

Appendix 2 ELR Update by District

Bolton Council's ELR (issued September 2008) appraised 44 sites (including 17 existing) and 11 town centre sites for mixed use. The quantitative demand projections involved using a variety of modelling techniques including projecting forward past take up rates; VOA statistics on Commercial and Industrial Floorspace trends; and econometric modelling utilising the GMFM 2007 update and Accelerated Growth Scenario (AGS). The demand projections factored in past losses of employment land to other uses; planning application details; business aspirations; a 20% margin of choice and capital substitution for labour in manufacturing.

Bury Council's ELR (published in March 2009) reviewed Bury's entire employment land portfolio of 315 sites and premises, a significant majority of which were located in Bury and Radcliffe with deficiencies elsewhere. The quantitative demand projections were based upon past take up rates, GMFM econometric modelling and VOA floorspace trends.

Manchester City Council's ELR is currently being undertaken by Nathaniel Lichfield and Partners and is due for completion in September 2009. It is anticipated that the final ELR will involve a review of existing sites and allocations, with demand modelling focusing upon past take up rates, GMFM econometric modelling and VOA floorspace trends. A particular focus of the ELR will be the issue of landless growth and how this impacts upon standard assumptions regarding the relationship between employment growth and associated land requirements.

Oldham Council's ELR is currently in draft, with Stage 1 and 2 completed. Oldham MBC is now starting work on Stage 3 (Review of Additional Sites). The ELR appraised 23 sites over 0.4ha, with demand modelling focusing upon past take up rates, GMFM econometric modelling and VOA floorspace trends.

Rochdale Council's ELR (completed July 2008) reviewed all allocated employment sites and areas. The demand analysis used 2006 GMFM forecasts to arrive at employment land requirements, alongside utilising past take up rates plus the RSS methodology (6% GVA growth plus 20% flexibility factor).

Salford Council's ELR (issued May 2009) involved a qualitative appraisal of 65 employment areas using a locally derived methodology. The demand requirements do not result from one specific method, but have been derived by taking a balanced view based on the available evidence. Along with more standard methods, this included rolling forward transactions and enquiries by use class using results from the Focus and Midas databases respectively.

Stockport Council are currently carrying out employment land forecasting work and have appointed consultants to undertake a study into office supply, which is expected to be published in May 2009. Whilst no ELR is currently available, the forecasting work will be used to inform the LDF and will incorporate GMFM forecasting and Evolutive information on recent demand, combined with consultation with the private sector over land requirements along with other studies such as MIER.

Tameside Council began work on an Employment Land SPD in 2007 in an attempt to address the pressure for housing and other non-employment redevelopment on existing employment land and sites. This focused upon an analysis of the current supply of sites (i.e. steps 1-4 of Stage 1 of the ODPM 2004 Guidance). The SPD was adopted in January 2009, and it is anticipated that the remainder of the ELR work will be completed during 2009. The methodology has been finalised and consultants have been appointed to complete the office and industrial market assessment in addition to the sectoral analysis outlined in the ODPM guidance. Demand modelling will be similar to many of the other Authorities. The quantity and quality review carried out for the evidence base of the Employment Land SPD looked at 217 sites.

Trafford Council's ELR (completed in May 2009) appraised 49 sites, including 15 from the call for sites process. Demand modelling focused upon past take up rates, GMFM econometric modelling and VOA floorspace trends. Whilst losses were factored into the demand projections, no flexibility allowance was included. Demand projections were also adjusted to take into account qualitative considerations emerging from a stakeholder workshop.

Wigan Council's ELR (December 2007) appraised 65 areas comprising 637 sites and undertook a range of demand forecasting techniques including past take up rates, VOA floorspace trends and GMFM econometric modelling (using data from 2005/06). Safeguarded Land sites were also included in the appraisal process to increase the forward supply of land.

Appendix 3 Economic and Planning Policy Context

Introduction

This chapter establishes the economic and planning policy context for the study by reviewing planning policy alongside current economic conditions and recent trends. This is important to help identify existing economic strengths and weaknesses, as well as those factors likely to influence the nature and level of future demand for employment space. The analysis focuses primarily upon the performance of Greater Manchester as a whole and this is benchmarked, where appropriate, against national and regional averages.

Policy Review

Planning Policy

The Regional Spatial Strategy, the adopted Unitary Development Plans and emerging Core Strategies for Greater Manchester have been reviewed, and can be summarised as follows:

- a RSS Policy RDF1 specifies that the Regional Centre (incorporating part of Manchester, Salford and Trafford) should be the first priority for growth, followed by the inner areas surrounding the Regional Centre, then towns and cities within the Manchester City Region such as Bolton, Burnley, Oldham, Rochdale, Stockport and Wigan;
- b In promoting opportunities for economic development, RSS Policy W1 specifies that in the Manchester City Region there should be an emphasis on growth sector opportunities comprising advanced manufacturing and engineering, financial and professional services, media, creative and cultural industries, biomedical and ICT and digital communications;
- c RSS Policy W2 specifies that regionally significant economic development should be located close to sustainable transport nodes within the urban areas;
- d The 2005 existing supply of employment land within Greater Manchester for the period to 2021 was 1,368 ha (RSS Policy W3). With a projected take-up rate of 112 ha per annum, an extra 917 ha of employment land is identified as being required, resulting in a total requirement of 2,285 ha;
- e The justification to RSS Policy W3 states that as the North West economy continues to restructure there will be a likely reduction in demand for B2 uses and a significant increase in demand for B1;
- f Manchester Airport is likely to act as key driver of economic growth, particularly in those local authority areas located close to the airport; and

- g RSS Policy MCR 1 seeks to achieve a significant improvement in the sub-region's economic performance by encouraging investment and sustainable development in the Regional Centre, surrounding inner areas and accessible suburban centres;
- h RSS Policy MCR2 relates to the Regional Centre and inner areas of the Manchester City Region and seeks to ensure that it continues to develop as the primary economic driver, providing the main focus for business, retail, leisure, cultural and tourism development in the City Region.
- i RSS Policy MCR3 relates to plans and strategies for the southern part of the City Region, which should sustain and promote economic prosperity, consistent with the environmental character of the area, by, for example focussing employment development in towns and on brownfield land; and
- j RSS Policy MCR5, which relates to the northern part of the City Region requires plans and strategies to support the transformation of the local economy, regenerate communities and enhance the environment; and
- k Detail relating to the specific amount of employment land allocated, and required, is not defined in a uniform manner across the 10 UDP's and emerging Core Strategies.

Policy W3 of the RSS explains in its supporting text that there exists a degree of uncertainty in establishing employment land requirements and there may be a need to provide additional land to take account of special circumstances such as the expansion requirements of a particular business. It is for that reason that policy W3 incorporates a flexibility factor of 20%, potentially adding to the sub-region's requirement.

Further accompanying text to policy W3 (para 6.12 of the RSS) suggests that employment land figures for each sub-region should be distributed in accordance with local labour market areas, broadly indicated by travel to work areas from the 2001 census. The steering group for this study all agreed that it was preferable to use district boundaries instead of travel to work areas (TTWAs) for the basis of disaggregating employment land requirements, not least due to the outdated data on which TTWAs are based (2001 census) and the fact that TTWAs cross administrative boundaries of the ten Districts.

Table 3.16 of the technical appendix published alongside the draft RSS in January 2006 explains that the policy response to the then existing employment land picture for Greater Manchester was to increase the amount of committed employment land. The supply for Greater Manchester was then 12 years and economic growth was anticipated and hence a need to identify additional employment land. There was concern that particularly strong growth in B1 uses may not be met by the allocations and together with the strength of the economy of Greater Manchester a 20% flexibility factor was considered sufficient to support future economic growth.

4 NW's employment land implementation note (April 2009) further expands on the flexibility factor and advises that the flexibility factor is not a given but needs to be considered by the Districts, based on what the evidence base reveals and set within the policy context of the RSS and emerging DPDs.

Economic Policy

A review of the Regional Economic Strategy, the Manchester City Region Development Programme and the Manchester Independent Economic Review (MIER) can be summarised thus:

- a Five key themes to achieve the vision for the region: business, skills & education, people & jobs, infrastructure and quality of life.
- b Priority sectors identified include biomedical, energy & environment technologies, advanced engineering, food & drink, digital & creative industries and business & professional services;
- c A need to encourage business start-ups, which in turn is likely to lead to an increased demand for incubator and managed workspace units;
- d Invest in the provision of quality business accommodation in HMR and URC areas in order to stimulate demand and enable growth;
- e Manchester Airport identified as critical to the development of an internationally competitive economy;
- f Up to 100,000 new jobs could be created in key growth sectors; and
- g MIER recommends that a unified regime for planning, regeneration and neighbourhood renewal be created in Greater Manchester.

Background Research

A review of the Demand for Employment Land in Greater Manchester by Arup and Donaldson's Assessment of Employment Land in Greater Manchester, was also undertaken. These documents concluded:

- a An additional **866,850 sqm of office space** is required in Greater Manchester over the period 2006 to 2021, with particular demand for small spaces under 464 sqm (5,000sqft);
- b Development **densities have increased** in recent years, currently reaching 8-12 storeys, compared to 4-6 storeys previously, with associated implications for landless growth;
- c **A move from high volume-low value to high value-low volume** manufacturing has resulted in smaller B2 units being required;
- d Over the ten years to 2001, whilst there was a net loss of just 2ha of employment land (excluding retail), this masked **a decline in B2 land (net 16 ha loss) but a strong growth in B1 office space** (net increase of 10 ha), and a net gain of 4ha of B8 land;

- e Between 2005 and 2021 the **economic growth of 7% is forecast but with a substantial decline in manufacturing sectors** and uneven growth across the area; and
- f A qualitative assessment by Donaldson’s **of 109 key employment sites; 27% were found to have poor or very poor prospects of being relevant to the identified growth sectors**, but the rest were either potentially or ideally suited to accommodating the growth sectors.

Employment Trends

Greater Manchester has experienced significant growth in employment during the past decade, with the total employee jobs in the sub-region rising from 1,061,500 in 1997 to 1,174,600 in 2007. This represents an increase of 10.6% which, although significant, is marginally lower than national (12.0%) and regional (12.4%) averages. Within the sub-region, the rates of growth observed across individual authorities during this period vary markedly. The number of jobs in Tameside remained almost static over the period (0.04%), whilst Manchester (16.5%) and Trafford (15.8%) recorded high increases.

Employment Structure

Figure 7 demonstrates how the structure of employment in Greater Manchester has altered during the period 1998 to 2007. This illustrates that the proportion of jobs accounted for by financial and business services increased from 17.6% to 22.5% over the period, whilst strong growth was also observed in public administration and health where the job share rose from 23.8% to 26.6%. In common with national trends, manufacturing jobs declined markedly, with the proportion of employment contracting from 18.2% to 10.9%. The relative representation of all other sectors remained reasonably stable.

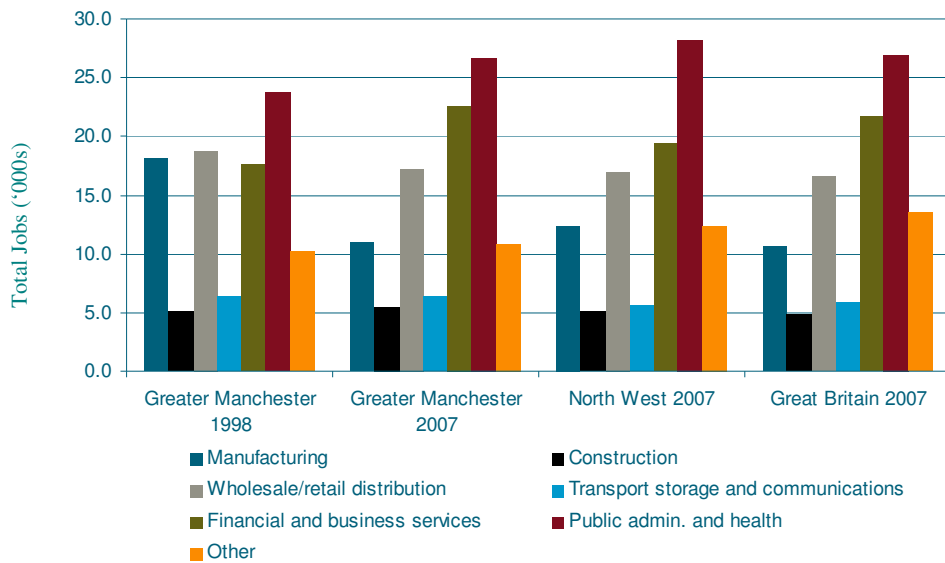


Fig 7 Employment Structure (Source: ABI)

Notwithstanding the significant decline in manufacturing jobs over the period, a corresponding reduction in the sector's economic output has not been observed. Indeed, ONS statistics show that manufacturing in Greater Manchester accounted for £6,089m in Gross Value Added (GVA) in 1998, increasing to £6,154m in 2006 in real terms.

This indicates that the loss of employment in manufacturing observed in Greater Manchester over the past decade tells only part of the story. Indeed, it would appear that many manufacturing businesses are continuing to operate successfully, albeit with fewer staff. It is likely that this is due in part to an increased automation of manufacturing, a process known as capital substitution for labour. Clearly, this has important implications for employment land requirements as although employment in the sector may fall in future, manufacturing businesses may remain and occupy the same land and buildings. This issue was highlighted by the Bolton Employment Land Review.

Figure 7 also illustrates how the current employment structure of Greater Manchester compares with the regional and national average. This shows that whilst it is broadly in alignment, there are some local differences. In particular, Greater Manchester includes a higher proportion of financial and business services (22.5%) than the North West (19.4%) or Great Britain (21.6%). This is underpinned by particularly high levels in Trafford (31.7%), Manchester (30.0%) and Salford (26.8%), reflecting the strength of the Regional Centre with respect to the sector.

Greater Manchester also contains a lower share of manufacturing jobs (10.9%) than the North West average (12.4%). There are still, however, a number of authorities with a high representation of manufacturing including Tameside (20.8%), Oldham (16.7%), Rochdale (16.6%) and Bolton (15.1%).

When considered alongside the over-representation of financial and business services outlined above, this indicates that the economy of Greater Manchester is more advanced than the North West as a whole with respect to the transition from an industrial to a service-based economy.

Job Density and Commuting Patterns

Job density is the ratio of total jobs to resident working-age population of an area and can be used to examine the relative strength of local jobs markets. Figure 8 illustrates that the job density of Greater Manchester (0.88) is the same as the national average, providing 88 jobs for every 100 residents of working age. Additionally, the graph clearly highlights the importance of Manchester and Trafford as key regional employment locations. In both authorities, there are more jobs than there are working age residents and as a consequence, these areas help to meet the employment needs of the surrounding authorities.

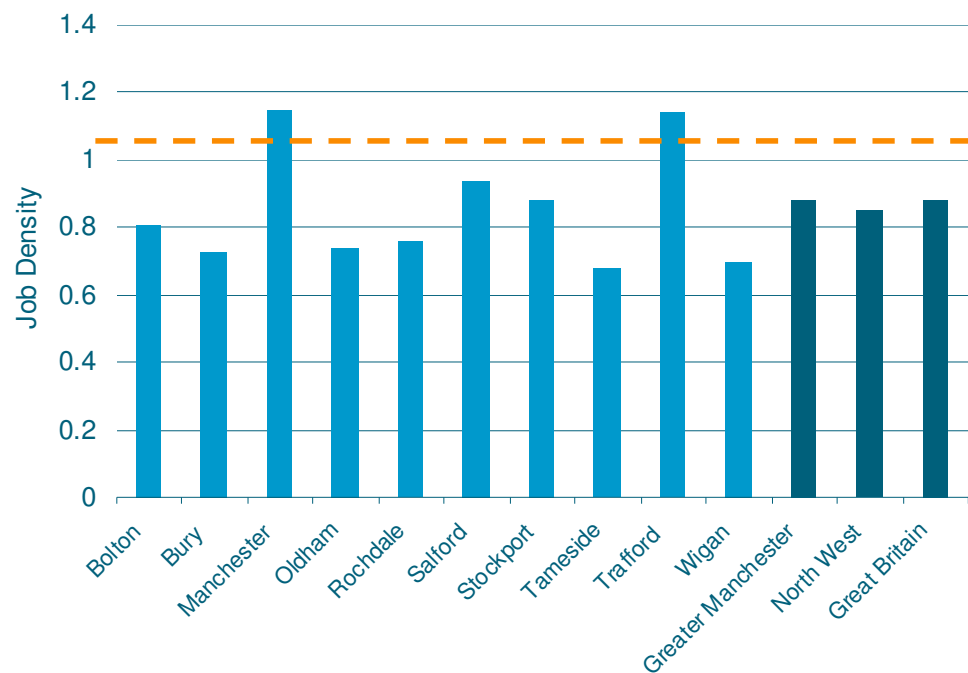


Figure 8 Job Density (Source: ONS / NLP Analysis)

An analysis of travel to work data, as set out in Figure 9, illustrates that Greater Manchester as a sub-region is a relatively self-contained employment market. It can be seen that there are very few major leakages of workers to jobs in authorities beyond the sub-region, whilst half of the Greater Manchester authorities have a containment rate¹⁴ of 60% or more.

The data again highlights the importance of those authorities comprising the Regional Centre as a major source of employment for the wider sub-region, with Manchester, Trafford and Salford experiencing a net inflow of commuters from the majority of adjacent authorities. Indeed, it is estimated that the three authorities experience a net inflow of more than 150,000 commuters, driven primarily by Manchester (with a net inflow of 125,000). This also reflects the job density data discussed above, which highlighted the important role played by Manchester and Trafford in providing a surplus of jobs relative to their working age populations.

¹⁴ NB – containment rate refers to the proportion of a local authority's resident population that are in employment and commute to jobs within the local authority area.

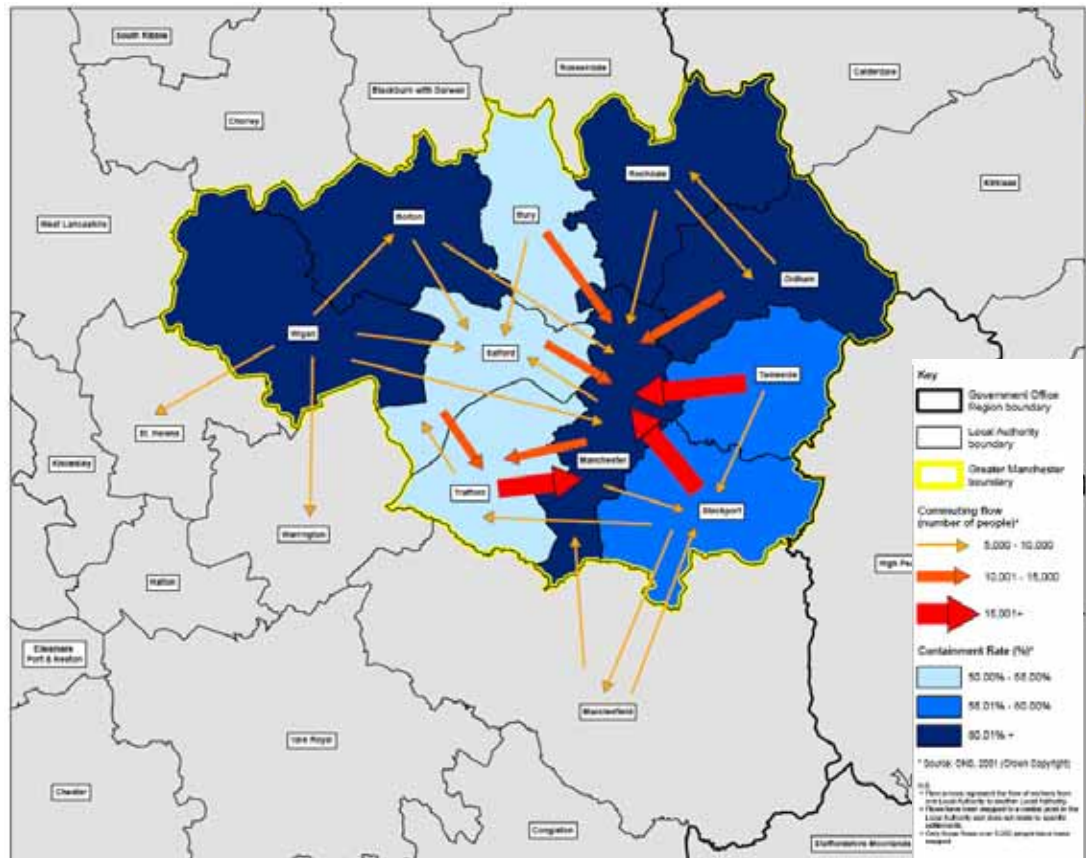


Figure 9 Travel to Work Patterns (Source: Census / NLP Analysis)

Business Base

Between 1997 and 2007, the number of VAT registered businesses in Greater Manchester increased from 60,100 to 70,800. This equates to an increase of 17.7%, below the levels of growth observed nationally (21.3%) and regionally (19.7%). The greatest increases were in Salford (28.5%), Trafford (25.5%) and Wigan (24.3%), with all three authorities experiencing levels of growth above the national average.

The size profile of the Greater Manchester’s business base is broadly in line with the national and regional average, as shown in Table 15. The stock of businesses is dominated by small firms, with 89.4% in the sub-region employing fewer than 20 people. At the other end of the size spectrum, just 0.6% of businesses in Greater Manchester employ 250 people or more. Clearly this has implications for the employment space needs of the area.

	Employees		
	0-19	20-249	250+
Greater Manchester	89.40%	10.00%	0.60%
North West	90.40%	9.10%	0.50%
Great Britain	91.20%	8.30%	0.50%

Table 15 Size Profile of Business Base (Source: UK Business: Activity, Size and Location)

Whilst the broad trend towards the dominance of small businesses is consistent throughout the sub-region, there are some fluctuations in the structure of the business base at the local authority level. The proportion of large businesses (250+ employees) is highest in Manchester (1.0%) and Salford (0.8%), reflecting the economic primacy of these locations, as well as the Regional Centre. Indeed, the UK Cities Index 2008 identified Manchester as the number one location for new business headquarters in the UK and clearly this places different demands on the area's property market, with a greater need for large headquarter premises.

Inward Investment

In recent years, Greater Manchester has performed well with respect to attracting inward investment. Data collected by MIDAS¹⁵ shows that over the period April 2004 to February 2008, 1,352 new investments were attracted to the sub-region, with a total value in excess of £490m. This level of investment is estimated to have created more than 19,000 new jobs over the period. A significant proportion of investment (25%) was made by SMEs.

The data recorded by MIDAS indicates that 45% of investors in Greater Manchester were seeking industrial premises and 34% offices. A further 10% were seeking managed workspace premises.

Additional data provided by MIDAS disaggregated to the local authority level demonstrates the strong economic role played by the authorities covering the Regional Centre. Indeed, more than 75% of inward investment projects in the last 5 years are estimated to have located within Manchester City, Salford and Trafford.

Impact of Recession

At present, the UK is in recession and it is important that this study takes account of the potential impact of the economic downturn upon the future demand for employment land and premises. One of the key impacts of the recession so far has been an increase in unemployment. This is highlighted in Figure 10.

¹⁵ Manchester Investment and Development Agency Service

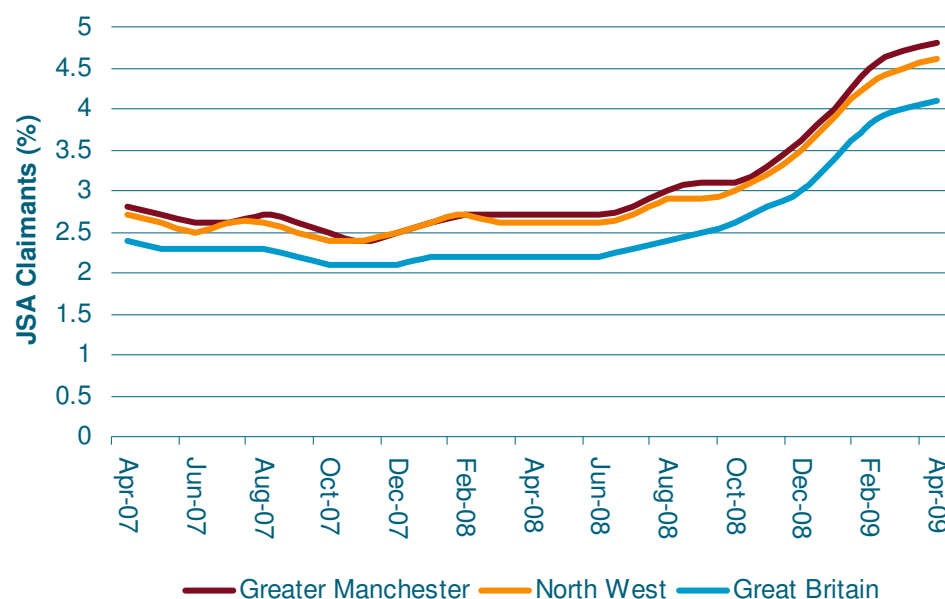


Figure 10 Claimant Unemployment (Source: NOMIS)

The graph indicates that the proportion of working age residents claiming Job Seekers Allowance (JSA) in Greater Manchester remained fairly stable over the period April 2007 to August 2008, fluctuating between 2.4% and 2.8%. Since then, however, the JSA claimant count has increased steadily, reaching 4.8% in April 2009. Throughout this period, levels of unemployment have remained broadly in line with the regional average (4.6% in April 2009) but slightly above the national average (4.1% in April 2009).

In addition to an increase in levels of unemployment, the number of job vacancies registered with Job Centre Plus has decreased significantly over the same period. In April 2007, there were 21,230 job vacancies registered across Greater Manchester, which had fallen to just 8,484 by April 2009. This represents a significant contraction of the local jobs market, meaning that it is currently far more difficult for those people out of work to find a new job.

The recession has resulted in economic growth forecasts for Greater Manchester being dampened down considerably, as discussed below.

It should also be noted that the Regional Economic Forecasting Panel recently produced a long-term baseline forecast for the North West on behalf of the Regional Intelligence Unit. The forecast is intended to provide a key input to the new Regional Strategy, RS2010, and draws upon projections developed by the three forecasting houses of Cambridge Econometrics, Experian and Oxford Economic Forecasting.

The Panel have used these inputs and other analysis to form a judgement on future growth, with the forecasts divided into two time periods:

- 2008-2015, to reflect the recession and the likely recovery period thereafter; and
- 2015-2030, by which time the UK and regional economies are expected to return to longer term growth trends.

Employment is projected to experience year-on-year decline between 2008 and 2011, before recovering and as a consequence, annual average growth to 2015 is forecast to be in the order of -0.1%. In the longer term, the underlying rate of employment growth is forecast to equate to 0.3% per annum. Overall, the forecast predicts that employment will increase by 150,000 over the period 2008-2030. It is understood that this work will be used as the platform to develop a set of sub-regional base forecasts. However, the sub-regional work will not be available until later in the year.

GMFM Projections

The Greater Manchester Forecast Model (GMFM) was developed by Oxford Economics to provide integrated economic, population and household forecasts for each of the Greater Manchester authorities. The GMFM provides robust and consistent information regarding current and projected future performance with respect to all three strands outlined above and is critical in underpinning the development of strategies and plans for Greater Manchester.

The first iteration of GMFM was published in 2007 and forecast that total employment in Greater Manchester would increase to 1,316,900 by 2026. In response to the economic downturn, a revised set of projections were commissioned and published in Autumn 2008 to take account of the potential impact of the recession. The 2008 GMFM forecast was less bullish; projecting that total employment in Greater Manchester would fall in over the period 2008-10 before increasing from 2011 onward, reaching 1,301,400 by 2032.

Figure 11 considers how the projections generated by the two runs of the GMFM differ on a sector-by-sector basis. Projected employment growth over a period of 19 years from the base date has been considered in both instances, to ensure a comparable time frame for analysis.

This illustrates that the most dramatic change in the projections relates to the Financial Intermediation sector. Whilst the 2007 GMFM forecast employment growth of approximately 6,000, the 2008 run projected that the sector would contract, suffering a loss of 3,400 jobs. This is understandable given the impact of the recession upon the financial sector both nationally and globally. However, this sector share of jobs is quite small.

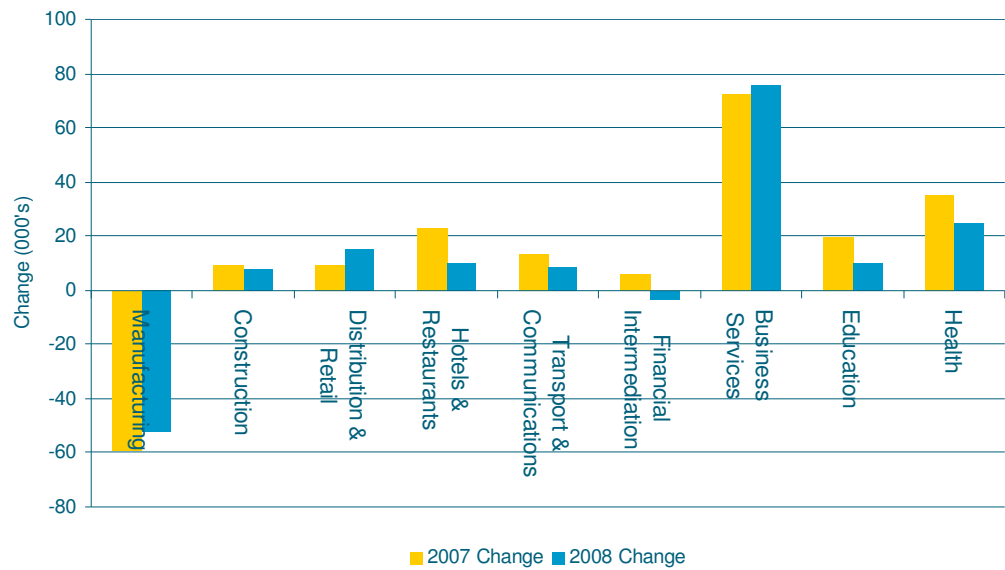


Figure 11 GMFM Forecast Employment Growth by Sector

The graph also shows that the growth forecasts for Education and Hotels & Restaurants were scaled back significantly by the 2008 GMFM; with the level of job growth reduced by approximately 50%. It can also be seen that both runs of the model forecast a significant decline in the level of employment in the manufacturing sector.

Additionally, Figure 12 considers the spatial distribution of the employment growth projected by the 2008 GMFM. This illustrates that, with the exception of Tameside, all of the authorities are expected to experience a net growth in employment. It can also be seen from the map that despite the economic downturn and the potential impact upon the financial services industry, Manchester City is still anticipated to be the key driver of growth in Greater Manchester. Indeed, the level of employment growth forecast for the city is more than four times higher than that projected for any other authority.



Figure 12 2008 GMFM Forecast Employment Growth (Source: GMFM / NLP Analysis)

Additionally, the map highlights that the majority of growth is expected to be clustered in the south of Greater Manchester, with the four authorities of Manchester City, Salford, Trafford and Stockport accounting for almost 90% of the projected job growth. This is reflected in the Manchester Independent Economic Review (MIER) which highlights that demand for employment sites is strongest in the south of Greater Manchester.

It should also be acknowledged that a partial run of the GMFM was commissioned in May 2009 to help inform the Manchester City Council Employment Land Review in light of the worsening recession. Whilst this does not provide a breakdown of employment change for each of the Greater Manchester authorities, it does provide some steer on how the position has shifted since the production of the 2008 GMFM discussed above.

In line with the 2008 GMFM, the 2009 work also projects that employment will decline over the period 2008-11, with the number of jobs beginning to increase thereafter. The 2009 GMFM does, however, indicate that the adverse impacts of the recession are likely to be more pronounced, with the level of employment across Greater Manchester projected to increase to 1,258,400 by 2032; a figure 43,000 lower than the 2008 GMFM.

Additionally, the 2009 GMFM provides employment projections for Manchester City, anticipating it to be the key driver of growth in Greater Manchester. Indeed. Over the period 2008-32, it is anticipated that Greater Manchester will

experience a net increase of 95,000 jobs, of which 55,800 will be in Manchester City. It can, therefore, be concluded that the remaining 9 authorities will see growth of 39,200 between them over the same period.

Clearly the extent to which the growth projections for Greater Manchester have been revised downward has major implications regarding the future demand for employment land. The forecasts produced in 2007 are likely to represent the top end of the market, whilst the 2008/9 work is likely to be close to the bottom and it is likely that actual future growth will lie somewhere between the two. It is therefore important for this study to consider the land use implications of a range of scenarios.

Economic Growth Opportunities

This sub-section assesses the future economic role of each District, the key drivers for each, and the types of sectors for which the sub-region would appear to have a competitive advantage.

All ten local authorities exhibit a number of common economic development aspirations as outlined in their respective Sustainable Community Strategies, emerging LDF documents and other Economic Strategy documents. These include the need to increase economic prosperity generally; to improve skill levels; to restructure the local economy so that it is better positioned to meet future challenges; and to target higher value growth industries, particularly knowledge-based businesses.

As regards the latter point, Table 16 shows that the relative representation of knowledge-based businesses varies significantly across Greater Manchester. It is particularly high in Trafford (27.0%), Manchester (24.9%) and Stockport (23.5%), all of which exceed the national average. The high concentrations in Manchester and Trafford are likely to reflect the Regional Centre's strengths in sectors such as financial and professional services, life science industries and a range of other knowledge intensive sectors. In Stockport, the high representation of knowledge-based businesses is likely to be a result of availability of a skilled labour force and proximity to Manchester International Airport.

It is important to understand the relative representation of knowledge-based businesses; that is, businesses operating in those sectors of the economy where added value is derived from the intensity and accumulation of knowledge. Firms operating within such sectors tend to grow faster than other firms and have greater future potential. Consequently, knowledge-based businesses represent an important indicator of an economy's competitiveness and future growth prospects.

	Proportion of Knowledge-Based Businesses ¹⁶		
	1997	2005	Change 1997-2005
Bolton	14.4%	17.0%	18.1%
Bury	15.4%	17.7%	14.9%
Manchester	19.3%	24.9%	29.0%
Oldham	13.3%	14.1%	6.0%
Rochdale	11.0%	13.4%	21.8%
Salford	15.0%	18.6%	24.0%
Stockport	20.8%	23.5%	13.0%
Tameside	13.1%	14.9%	13.7%
Trafford	24.2%	27.0%	11.6%
Wigan	13.7%	15.4%	12.4%
Great Britain	18.6%	20.5%	10.2%

Table 16 Proportion of Knowledge Based Businesses (Source: UK Competitiveness Index)

In addition, the likely suitable locations for new economic development, in the context of the existing portfolio of employment land, have been reviewed. Maps taken from Arup's Demand for Employment Land in Greater Manchester report are reproduced in Appendix 1. These indicate that, in general, Manchester City is suitable for most forms of industrial development, with the exception of food and drink, followed by Trafford and Salford. The greatest number of available sites are located within Wigan (which is identified as being suitable for construction, engineering and manufacturing, food and drink and logistics) followed by Bolton and Trafford. In summary, the Arup/Donaldsons reports indicate that:

- **Bury** is particularly well suited to healthcare and ICT/ digital industries and food and has sites available for such development;
- **Bolton** is well suited for engineering & manufacturing and financial & professional services;
- As noted above, **Manchester**, at the heart of the Regional Centre, is suitable for most forms of industrial cluster development, with an emphasis on the financial and professional services sector and education, healthcare/biotechnology (focussed in particular on the Oxford Road corridor).
- **Oldham** has sites available for industrial development, although the Arup report considered that the sectors for which Oldham is most suited (i.e. engineering and manufacturing) could not be accommodated on these sites;
- **Rochdale** has considerable potential for growth in the logistics sector with sites identified as being suitable for this form of development; Kingsway is also highlighted as an excellent opportunity to develop customer contact and shared service centres as a business function;

¹⁶ NB – The UK Competitiveness Index categorises the following as knowledge-based businesses: high-technology manufacturing and knowledge-based services such as telecommunications, IT services, and research and development activities.

- Along with the creative industries and media sector arising from the Media City development at Salford Quays, **Salford** is also appropriate for the logistics sector, having sites available and suitable for this.
- **Stockport** is identified as being particularly suitable for ICT / digital cluster development and financial and professional services, particularly within the town centre, and has sites suitable for this use. Stockport is also an advantageous location for shared service centres (back office and HQ facilities) due to the local skills base and relatively cheaper office accommodation in highly accessible locations. Stockport also has the potential to attract the emerging/growing Data Centre sector on former manufacturing sites.
- **Tameside** has several industrial sites suitable for engineering and manufacturing. Food and drink are established clusters in the district and are likely to remain so;
- **Trafford** is particularly suited to financial and professional services and ICT / digital and has sites available and suitable for these uses; and
- **Wigan** is particularly well suited for logistics, engineering & manufacturing and food and drink

It is also important to understand the relative roles, strengths and weaknesses of different areas within Greater Manchester. A brief overview is provided below:

- **The Regional Centre:** underpinned by strong concentrations of high value industries. Financial and professional services are currently well represented within the Regional Centre, with particular concentrations in Manchester City Centre, Salford Quays and Trafford Park. Media and creative industries are currently focused in regional centre fringe locations such as the Northern Quarter. The development of MediaCity UK in Salford is expected to serve as a further catalyst to growth in the sector. Health and life sciences are well represented in this area, particularly focussed along the Oxford Road Corridor, in close proximity to the teaching specialisms of the universities, as well as Manchester Science Park.
- **Southern Areas:** MIER acknowledges that parts of Trafford outside of the Regional Centre retain strengths in a diverse range of manufacturing subsectors. This includes food and drink, and high value niche specialisms linked to the automotive supply chain. Additionally, there are concentrations of logistics activity focussed around Manchester Airport, as well as in Trafford around the M6 and in Stockport close to the M60 and M62. MIER also projects that Stockport will experience a growth in creative and digital industries in future, to complement the existing concentrations of financial and professional services satellite operations and ICT/communications businesses operating from out of town locations in the Borough.

- **Northern Areas:** as highlighted by MIER, the authorities in the north of Greater Manchester also retain a strength in a range of manufacturing subsectors, including: mechanical and electrical engineering in Oldham, Rochdale and Wigan; electronics/communications in Bolton and high value niche specialisms such as those linked to the automotive supply chain in Bolton. In addition it is understood that there is a growing satellite of financial and business services located in and around Bolton, whilst Bury has been successful in attracting a number of ICT/communications businesses. There is also a concentration of logistics activity focused around Wigan, capitalising upon the accessibility of the area.

Transport Infrastructure

In May 2009, a new £1.5bn transport strategy was announced for Manchester following the demise of the Transport Innovation Fund bid. The Association of Greater Manchester Authorities submitted a new £1.5bn transport strategy to Secretary of State for Transport for approval. The transport secretary subsequently agreed to plans to fast-track £244m of projects included on this list - including Metrolink extensions to East Didsbury and Ashton-under-Lyne.

There are a number of accelerated schemes with provisional funding identified, which include:

- Metrolink: work proceeding on new tram line to Chorlton. East Didsbury line with stops at Withington, Burton Road, West Didsbury, Didsbury Village and East Didsbury
- Metrolink: Construction is continuing on a tram line to Droylsden. A new Metrolink line will run between Droylsden and Ashton under Lyne, calling at Audenshaw, Ashton Moss, Ashton West and Ashton-under-Lyne.
- Elements of Cross City bus package include introducing more bus priority measures to make journeys to the universities and hospitals on Oxford Road quicker and more reliable. This will include new links from north and west Greater Manchester and improve the quality of buses serving the area.
- Park and ride sites throughout Greater Manchester serving a mix of rail and Metrolink routes

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There are also a number of priority schemes with funding identified, including:

- Metrolink: new line to Manchester Airport, calling at Barlow Moor Road, Hardy Farm, Sale Water Park, Northern Moor, Wythenshawe Park, Moor Road, Baguley, Roundthorn, Martinscroft, Haveley, Benchill, Crossacres, Wythenshawe town centre, Robinswood Road, Peel Hall, Shadowmoss, Woodhouse Park and the airport.
- Second City tram crossing
- Metrolink: Metrolink is already being constructed through Oldham town centre and funding has now been earmarked to build a new loop line to Oldham town centre, from Werneth to Oldham Mumps
- Metrolink: to extend the line serving Rochdale railway station, down Drake Street to a new transport interchange in Rochdale town centre

- SEMMMS relief road - new dual carriageway linking the airport roundabout at the end of the M56 spur to the A555 at Bramhall, and from the A555 at Bramhall to the A6 at Hazel Grove
- Mottram Bypass and Glossop Spur
- Ashton Northern Bypass stage 2 - which will complete the ring of relief roads around Tameside town centre by extending the Ashton northern bypass (stage 1) through to the Arlington Street link in the north of the town.
- Wigan inner relief road - new route between the A49 Saddle junction and Frog Lane and would complete the inner relief road.
- Leigh-Salford-Manchester rapid transit busway, with buses guided on a 7km path along a former rail route between Leigh and Ellenbrook
- Contributions to station upgrades
- Altrincham new transport interchange
- Bolton new transport interchange, adjacent to rail station, involving relocation of bus station

Other priority schemes with funding awaited include:

- Metrolink: new line connecting Pomona with Trafford Park
- Manchester Rail Hub
- Metrolink Wythenshawe Loop
- Stockport new transport interchange
- Stockport town centre access scheme – various highways and public transport improvements to reduce congestion, improve bus journey times and reliability, and improve walking and cycling opportunities around the town centre.
- Options for reducing congestion between Ramsbottom, Bury and Heywood including the development of the East Lancashire Railway

The new transport strategy involves securing £1 billion through contributions from local transport programmes, future GMITA levies and regional allocations which have been earmarked for Greater Manchester. The schemes in the £1.5bn transport plan are in addition to the £600m investment currently underway to expand the Metrolink network with new lines to Oldham and Rochdale, Droylsden in Tameside, Chorlton in South Manchester and MediaCity in Salford.

Appendix 4 Consultation

NLP met with the following bodies during the preparation of the Statement:

- 1 Employment SPIGlet - 17th June 2009
- 2 Planning officers Group – 19th June 2009
- 3 MIDAS – 29th June 2009
- 4 4NW and NWDA – 2nd July 2009
- 5 Manchester City Council
- 6 Bolton MBC
- 7 Wigan MBC
- 8 Salford City Council
- 9 Rochdale MBC
- 10 Bury MBC
- 11 Stockport MBC
- 12 Tameside MBC
- 13 Trafford MBC
- 14 Oldham MBC

In addition NLP undertook telephone interviews with the following organisations:

- 15 Ask Developments
- 16 Peel Holdings
- 17 EC Harris
- 18 CB Richard Ellis

Appendix 5 District Summary Tables

BOLTON	Comment
Strengths/weaknesses/ aims/potential	<p>Retains strength in a range of manufacturing subsectors, including electronics/communications and high value niche specialisms such as those linked to the automotive supply chain. Also a growing satellite of financial and business services located in and around the district.</p> <p>Stated aim to increase economic prosperity generally across the Borough and to narrow the gap between the haves and the have nots. Previously allowed considerable out-of-centre development, although future focus is likely to be on offices in the town centre, which is receiving public sector body support. There is potential for further B2/B8 development along the motorway network.</p> <p>Key Implication: Potential for growth in key sectors supported by public sector funding.</p>
Potential growth sector impacts	Bolton is well suited for engineering & manufacturing and financial & professional services.
Summary conclusions of ELR	<p>Identified a shortfall of between 126 to 179 hectares of allocated employment land over the period to 2026.</p> <p>The study recommended that Bolton should consider retaining the majority of its existing allocated employment sites (with 2 exceptions), and allocating 11 suggested town centre sites for employment-led mixed use.</p>
Summary of ELR Demand Projections (2007-26)	<p>175-195ha</p> <p>Key implication: Qualitative considerations resulted in consultants using the lower end of the demand range projected.</p>
Use of the Flexibility Factor?	YES – 20% to ensure consistency with the regional levels and other ELRs produced by Arup in the North West region.
Summary of District's existing/potential supply of sites	<p>103.41/220.71ha</p> <p>Key implication: Potentially a sufficient supply of good quality sites to meet forecast ELR demand.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>233ha rising to 247ha incorporating 6% growth factor.</p> <p>Key implication: High rate of past take up in excess of ELR demand projections.</p>
Job growth (GMFM) 2007-27	<p>-35ha / -17ha (net)</p> <p>Key implication: One of the lower demand projections due to considerable forecast losses in B2 industries.</p>
Implications of landless growth for District	<p>Aside from high density office growth in Bolton town centre, other landless growth opportunities are expected to be limited with continued strong demand for B2/B8.</p> <p>Key implication: Lower future prospects for landless growth, in the GM context.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> Bolton has reasonable prospects for growth in higher value engineering / manufacturing specialisms and to a lesser extent FBS. The 175-195ha ELR demand projections incorporated the 20% flexibility factor, but were toward the bottom end of the forecasts used. The district has 103ha of employment land, potentially rising to 221ha.

BURY	Comment
Strengths/weaknesses/aims/potential	<p>Bury retains its strength in a range of manufacturing subsectors, and has been successful in attracting a number of ICT/communications businesses. The Borough is taking an optimistic view on growth, aspiring to move away from traditional manufacturing toward more office-based research and development employment opportunities to introduce better quality and higher paid employment opportunities for residents.</p> <p>Key Implication: Growth in Business Service sectors to compensate for continued restructuring in the traditional manufacturing industries.</p>
Potential growth sector impacts	Bury is particularly well suited to healthcare and ICT/ digital industries and food sectors.
Summary conclusions of ELR	ELR identified a requirement for 76.9ha and an initial deficit of 45.34ha. 14 potential new sites were identified (equal to 52.78ha), resulting in a total portfolio of 84.34ha, although as a result of the consultation draft 'Bury but Better' Study, an additional 7 B1 office sites (7.25ha) have been identified which would take the overall portfolio to 92ha. These additional sites will be considered as part of a review of Bury's ELR.
Summary of ELR Demand Projections (2007-26)	<p>76.9ha</p> <p>Key implication: Figure in excess of committed supply – this resulted in a requirement for an additional 52.78ha.</p>
Use of the 20% Flexibility Factor?	NO – the ELR identifies an additional 7.44ha on top of the demand requirement of 76.9ha. However, the potential addition of 7.25ha that have been identified in the consultation draft 'Bury but Better' study would effectively represent an allowance for an additional 20%.
Summary of District's existing/potential supply of sites	<p>48.12 / 92ha</p> <p>Key implication: Potentially a sufficient supply of good quality sites to meet forecast demand if 14 potential new sites are allocated as recommended in the ELR together with the additional sites that have been identified in the consultation draft 'Bury but Better' study.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>101ha rising to 108ha incorporating 6% growth factor.</p> <p>Key implication: Past take up slightly in excess of ELR demand projections.</p>
Job growth (GMFM) 2007-27	<p>-27.3ha / -19.2ha (net)</p> <p>Key implication: One of the lowest growth projections in the sub-region, with particularly low rates forecast for Business Services and other B1-type uses despite Council aspirations.</p>
Implications of landless growth for District	<p>Landless growth has not been observed in the District in recent years, although that may change in the future as there are 7 potential sites in Bury Town Centre which could accommodate higher density office uses, whilst an additional 50,000sqm of unspecified B1 floorspace has also been identified to come forward.</p> <p>Key implication: Moderate future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> Bury has reasonable prospects for growth in health care, food and ICT/digital clusters. Council aspirations for growth in Business Services sectors not reflected in GMFM growth projections. The 76.9HA ELR demand projections did not incorporate the 20% flexibility factor. Factoring in the allocation of 14 new sites and the 7 sites identified in the consultation draft 'Bury but Better' study, the district potentially has 92ha of employment land.

MANCHESTER	Comment
Strengths/weaknesses/aims/potential	<p>The Regional Centre is underpinned by strong concentrations of high value industries. FBS is currently well represented in the City, whilst media and creative industries are currently focused in fringe locations such as the Northern Quarter. Health and life sciences are well represented, particularly along the Oxford Road Corridor.</p> <p>The City Centre has high concentrations of knowledge based businesses, reflecting the Regional Centre's strengths in FBS, life science industries and other knowledge intensive industries. The 2008 GMFM model run forecasts continued strong growth in the Business Services sector in Manchester City, with the area accounting for 58% of net job growth in the sub-region.</p> <p>Key Implication: strong growth in high value professional services sectors driving the sub-regional economy for the foreseeable future.</p>
Potential growth sector impacts	Manchester is suitable for most forms of industrial cluster development, with an emphasis on the financial and professional services sector and education, healthcare/biotechnology.
Summary conclusions of ELR	Demand requirements likely to be in the range of 187-236ha 2008-26. Considerable potential supply of sites, although Central Park dominates the current portfolio.
Summary of ELR Demand Projections (2007-26)	<p>197-249ha</p> <p>Key implication: likely to be higher than actual land requirement, given high density office development.</p>
Use of the Flexibility Factor?	YES – given strong growth projections, although considerable evidence of landless growth in recent years, a trend expected to continue.
Summary of District's existing/potential supply of sites	<p>164.2ha in AMR, although this does not allow for the inclusion of a much larger area at Central Park which they now consider to be designated for employment land - (163.20ha now compared to around 25.98ha previously that informed the AMR.</p> <p>Key implication: potential under-supply of land in absolute quantitative terms, although evidence of landless growth may justify lower levels of provision. Substantial potential supply of 551.4ha.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>207ha rising to 220ha incorporating 6% growth factor.</p> <p>Key implication: Rate of past take up in broad compliance with ELR demand projections.</p>
Job growth (GMFM) 2007-27	<p>155.3ha / 207.5ha (net)</p> <p>Key implication: By far the strongest growth forecasts of all the districts in the sub-region, with a particularly strong growth forecast for B1-type industries (192-231ha net), although even here growth forecasts in traditional B2 manufacturing are projected to decline markedly to 2027.</p>
Implications of landless growth for District	<p>Apparent that although the number of jobs based in the Regional Centre has increased dramatically, this has not led to a commensurate take up of employment land. The Business Services sector is likely to be the prime driver for economic growth in the period to 2026 and it seems realistic to assume that job densities and 'landless growth' will remain high.</p> <p>Key implication: Very High future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> Manchester City has very strong future growth prospects for all forms of industrial cluster development, particularly in high value professional services and knowledge based industries. The 197-249ha ELR demand projections incorporated the 20% flexibility factor. The district has 164.2ha of employment land, rising to 260ha including a larger area of Central Park.

OLDHAM	Comment
Strengths/weaknesses/aims/potential	<p>The district is seeking economic transformation through diversification of the economy and improving its skills base. Oldham retains its strength in a range of manufacturing subsectors, particularly mechanical and electrical engineering. It is understood that future target sectors include ICT, digital engineering and cultural industries. Considerable investment is underway constructing Metrolink through Oldham town centre, with further funding earmarked.</p> <p>Key Implication: strong representation in declining industries, although substantial transport investment may improve attractiveness of the district to new industrial users.</p>
Potential growth sector impacts	Engineering and manufacturing
Summary conclusions of ELR	<p>Identified a shortfall of between 92.05ha and 96.85ha. ELR concluded that providing new sites to cover this 'gap' in the portfolio was unachievable, given the topographical constraints and the Green Belt restrictions. Concluded that opportunities should be taken to increase the development of offices in the district and hence employment densities. Alternative recommendations included the allocation of new sites from Land Reserved for Future Development, as well as identifying new allocations from within masterplan areas.</p>
Summary of ELR Demand Projections (2007-26)	<p>132.8-137.6ha</p> <p>Key implication: unachievable level of demand, given restrictions.</p>
Use of the Flexibility Factor?	<p>NO – not for the Preferred Methodology, which is based on past take up rates that have then been moderated by factoring in the proportional change in B-use employment from the GMFM.</p>
Summary of District's existing/potential supply of sites	<p>79.58/69ha</p> <p>Key implication: significant under supply of land with few viable opportunities for new allocations.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>165ha rising to 175ha incorporating 6% growth factor.</p> <p>Key implication: High rate of past take up well above ELR demand projections.</p>
Job growth (GMFM) 2007-27	<p>-34.6ha / -22.8ha (net)</p> <p>Key implication: Similar overall growth forecasts as for Bolton, although growth in B1 employment forecast to be weaker, whilst B2 decline likely to be less precipitous.</p>
Implications of landless growth for District	<p>Whilst landless growth has not been witnessed to a significant extent in the recent past, the redevelopment of brownfield sites at higher densities is likely to be a pre-requisite given the district's development restrictions and aspirations.</p> <p>Key implication: Lower future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> • Oldham has reasonable prospects for growth in engineering and manufacturing, although it is recognised that these are declining industries as a whole. • The 133-138ha ELR demand projections incorporated the 20% flexibility factor, despite the restricted availability of sites. • The district potentially has 69ha of employment land.

ROCHDALE	Comment
Strengths/weaknesses/aims/potential	<p>Retains its strength in a range of manufacturing subsectors, including mechanical and electrical engineering. Considerable investment in a new Metrolink link to extend the line serving Rochdale railway station, down Drake Street to a new transport interchange in Rochdale Town Centre. The district's aspirations include a desire to retain a balanced economy with higher quality jobs contributing to an increase in GVA.</p> <p>Key Implication: development of Kingsway should make a major contribution to providing higher skilled jobs in the district.</p>
Potential growth sector impacts	<p>Considerable potential for growth in the logistics sector; Kingsway also represents an excellent opportunity to develop customer contact and shared service centres as a business function.</p>
Summary conclusions of ELR	<p>Rochdale has one of the largest employment land portfolios in the sub-region. A smaller, more focussed, and higher quality portfolio of employment sites would give developers greater certainty and therefore confidence to develop speculatively. The average of the five demand variations used in the ELR equates to an additional requirement of 26.4ha, which ties in closely to RSS figure using the mid-range Kingsway allowance of 29.2ha. On this basis, the ELR concluded that the provision of a further 25-30ha, over and above the proposed new supply of 185ha identified, would seem appropriate.</p>
Summary of ELR Demand Projections (2007-26)	<p>ELR stipulated 210-215ha 2005-21 – Council officers consider that this should remain the figure for 2007-26 given the ongoing recession.</p> <p>Key implication: additional allocation required of 25-30ha; over half of the total demand likely to be taken up by the Kingsway site.</p>
Use of the Flexibility Factor?	<p>YES – 20% has been used, based on previous studies and DTZ's market knowledge.</p>
Summary of District's existing/potential supply of sites	<p>175.2/205.2ha</p> <p>Key implication: moderate additional allocations required – windfalls not included, but expected to form a significant part of forward supply in future.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>184ha rising to 195ha incorporating 6% growth factor.</p> <p>Key implication: Past take up broadly in accordance with ELR demand projections.</p>
Job growth (GMFM) 2007-27	<p>-19.2ha / -3.7ha (net)</p> <p>Key implication: Slight negative net requirements (with flexibility factor) primarily due to reasonably strong growth forecasts for B1 employment, one of the highest of the northern districts.</p>
Implications of landless growth for District	<p>Little evidence of landless growth occurring in recent years, with strong demand in the recent past for lower density B2/B8 use. Kingsway will provide office opportunities but there are opportunities for higher density office development in Rochdale and Middleton Town Centres also.</p> <p>Key implication: Moderate future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> • Rochdale has considerable potential for growth in the logistics sector • Kingsway provides the largest allocation • The 210-215ha ELR demand projections incorporated the 20% flexibility factor. • The district has 175ha of employment land, potentially rising to 205ha.

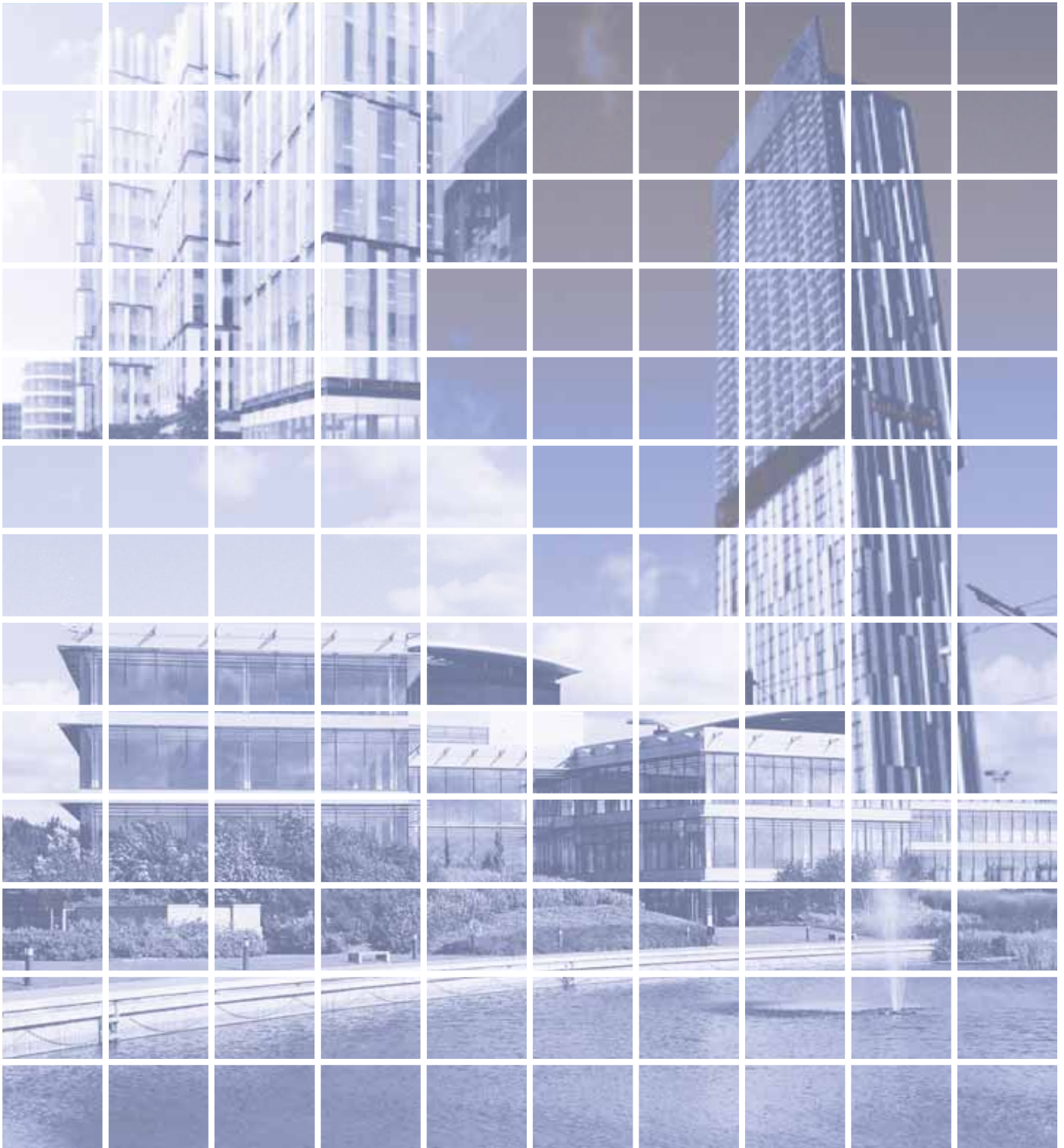
SALFORD	Comment
Strengths/weaknesses/aims/potential	<p>The Regional Centre is underpinned by strong concentrations of high value industries. Financial and professional services are currently well represented within Salford Quays whilst the development of MediaCity UK is expected to serve as a further catalyst to growth in the sector.</p> <p>Key Implication: High growth potential – major concentration of media-related and other knowledge-based industries, with the Council keen to maximise the benefits of the BBC and other investment in key creative/digital/new media growth sectors.</p>
Potential growth sector impacts	<p>Along with the creative industries and media sector arising from the MediaCity development at Salford Quays, Salford is also appropriate for the logistics sector.</p>
Summary conclusions of ELR	<p>The ELR noted that the decline in traditional manufacturing and the growth in the service sector indicated a need for a reduction in the overall stock of industrial floorspace and an increase in office accommodation. There is currently an under supply of good quality sites. Attention should be focused on identifying new sites for logistics users on the M60 corridor. The ELR also recognised the need to realise the potential of Salford Quays and locations on the edge of the Regional Core.</p>
Summary of ELR Demand Projections (2007-26)	<p>124-243.5ha</p> <p>Key implication: Substantial range in figures. Potential requirement biased towards B2 – maximum of 152ha compared to 28.5ha for B1 and 63ha for B8. As this is considerably higher than the current supply, much of this demand will need to take place on windfall sites if no new allocations are forthcoming.</p>
Use of the Flexibility Factor?	<p>NO –although the consultants undertaking the ELR did acknowledge the need for it in their analysis of GMFM forecasts.</p>
Summary of District's existing/potential supply of sites	<p>123.25/198.25ha</p> <p>Key implication: figures include 50ha Barton site, a modal freight allocation. Generally an under-supply of land, although recycling of existing sites anticipated to be a major source of land in the future.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>157ha rising to 166ha incorporating 6% growth factor.</p> <p>Key implication: Past take up rates considerably below top end of ELR demand projections.</p>
Job growth (GMFM) 2007-27	<p>8.5ha / 25.2ha (net)</p> <p>Key implication: strongest growth forecasts in the sub-region behind Manchester City and Trafford. Has the second lowest forecast decline in B2 employment in the sub-region.</p>
Implications of landless growth for District	<p>High density office development in recent years has resulted in higher employment densities and landless growth. This trend is likely to continue in future with developments at Media City in Salford Quays and the recycling of land.</p> <p>Key implication: Higher future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> • Salford has high growth potential particularly in media-related and other knowledge-based industries. • The 124-243.5ha ELR demand projections incorporated the 20% flexibility factor. • The district has 123ha of employment land, potentially rising to 198ha.

STOCKPORT	Comment
Strengths/weaknesses/ aims/potential	<p>Council has aspirations to boost professional services, in order to reduce the outflow of highly skilled commuters into the Regional Centre. Major drive for office accommodation in Stockport Town Centre, targeting education and science sectors.</p> <p>Concentrations of logistics activity focussed in Stockport around the M60 and A6 and/or town centre. MIER projects that Stockport will experience a growth in creative and digital industries in future, to complement the existing concentrations of financial and professional services satellite operations and ICT/communications businesses operating from out-of-town locations in the district.</p> <p>Key Implication: Aspirations to retain highly skilled residents from commuting elsewhere supported by positive growth forecasts in key sectors and push for high density, in-centre, office development.</p>
Potential growth sector impacts	<p>Stockport is identified as being particularly suitable for ICT/digital cluster development and financial and professional services, particularly within the town centre. Stockport is also an advantageous location for shared service centres (back office and HQ facilities) due to the local skills base and relatively cheaper office accommodation in highly accessible locations. Stockport also has the potential to attract the emerging/growing Data Centre sector on former manufacturing sites.</p>
Summary conclusions of ELR	No ELR available at present.
Summary of ELR Demand Projections (2007-26)	<p>138.13ha</p> <p>Key implication: Demand forecasts are considerably in excess of potential supply even without applying the 20% flexibility factor – may require landless growth/high density office use in the future.</p>
Use of the Flexibility Factor?	NO – Given the limited supply of available sites; drive for office development in Stockport Town Centre and the Green Belt land use restrictions.
Summary of District's existing/potential supply of sites	<p>60.62/100.62ha</p> <p>Key implication: Under supply of land. Officers keen to develop high density offices in Stockport Town Centre in future, which may reduce overall land requirements. Few greenfield opportunities for new allocations.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>152ha rising to 161ha incorporating 6% growth factor.</p> <p>Key implication: past take up rate considerably in excess of future projections and available supply – however, nature of take up changing with increasing amounts of B1 at higher densities than before, hence past take up not necessarily a reliable guide for future requirements.</p>
Job growth (GMFM) 2007-27	<p>-18.3ha / -1.9ha (net)</p> <p>Key implication: Continued B2 decline balanced somewhat by moderate forecast growth in B1 and one of the higher growth forecasts for B8-related industries.</p>
Implications of landless growth for District	<p>Traditionally experienced high levels of B2/B8 industrial development coming forward, at relatively low densities; however, given restrictions on greenfield land release in future and the drive for town centre development, it is likely that the recycling of existing sites and higher density office development will take place on an increasing scale.</p> <p>Key implication: Moderate future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> • Stockport has strong growth potential in creative and digital industries and is seeking to stimulate the office market in Stockport Town Centre. • The 138ha demand projections did not incorporate the 20% flexibility factor. • The district has 60.6ha of employment land, potentially rising to 100.6ha.

TAMESIDE	Comment
Strengths/weaknesses/aims/potential	<p>Potential growth sectors seek to build on established clusters, including major engineering and food sectors, although these are currently contracting rapidly. The council is seeking to balance growth evenly throughout the District. Tameside is the only GM district with negative net overall employment growth forecasts in the 2008 GMFM.</p> <p>Key Implication: Contracting established sectors and considerable pressure on existing employment sites for alternative higher value uses.</p>
Potential growth sector impacts	<p>Food and drink are established clusters in the district and are likely to remain so in the future.</p>
Summary conclusions of ELR	<p>SPD focussed predominantly upon the supply implications – the second and third stages of the ELR have yet to be undertaken. Limited supply of sites due to constraints; a high number of employment sites have been lost to alternative uses in recent years. Initial forecasting based on the RSS methodology indicated a potential shortfall of 91.6ha.</p>
Summary of ELR Demand Projections (2007-26)	<p>249.2ha (209.9ha 2005-21)</p> <p>Key implication: Considerable potential shortfall of employment sites given demand projections. NOTE – this is not the official ELR demand projection, as work is still underway, but represents a calculation made using the RSS W3 methodology.</p>
Use of the Flexibility Factor?	<p>YES – in accordance with North West RSS methodology.</p>
Summary of District's existing/potential supply of sites	<p>74.19/94.19ha</p> <p>Key implication: Sites remain limited and under pressure for alternative uses. Potential supply figure incorporates an additional 20ha site at Mottram.</p> <p>Generally an under supply of sites and an imbalance across the Borough, with a need for new greenfield releases in places such as Hattersley.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>123ha rising to 130ha incorporating 6% growth factor.</p> <p>Key implication: past take up lower than ELR demand projections but still considerably in excess of supply.</p>
Job growth (GMFM) 2007-27	<p>-46.4ha / -33.3ha (net)</p> <p>Key implication: highest projected net decline overall of all the GM districts, with steep decline in B2-related industries and only a very minor growth in B1 employment.</p>
Implications of landless growth for District	<p>Little evidence of landless growth at present. The main opportunity for high quality office development is likely to comprise Ashton Moss Strategic Site, with an opportunity for high quality office development in the St Petersfield area (approx 20,000sqm of outstanding pp), although landless growth opportunities as a whole are likely to remain limited.</p> <p>Key implication: Lower future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> • Tameside has limited prospects for future growth, with reliance on established but vulnerable clusters such as engineering and manufacturing. • The 249ha ELR demand projections incorporated the 20% flexibility factor. This figure is considered to be excessively ambitious as the calculation was made before the full ELR has been completed and bears no relation to the current availability of land in the district. • The district has 74ha of employment land, potentially rising to 94ha.

TRAFFORD	Comment
Strengths/weaknesses/aims/potential	<p>MIER acknowledges that parts of Trafford outside of the Regional Centre retain strengths in a diverse range of manufacturing subsectors. This includes food and drink, and high value niche specialisms linked to the automotive supply chain. Additionally, there are concentrations of logistics activity focussed around the M60.</p> <p>There are further opportunities to develop the capacity of the Trafford Park Core Industrial area as a sub-regional resource providing sustainable long-term employment growth opportunities to support economic regeneration, improved skills levels and development within and beyond the Borough. The Metrolink extension through Trafford Park will further boost growth in this established area.</p> <p>Key Implication: Strong prospects for continued growth in established industrial areas.</p>
Potential growth sector impacts	Trafford is particularly suited to financial and professional services and ICT / digital.
Summary conclusions of ELR	<p>Based on the scenarios modelled the ELR concluded that Trafford had sufficient land supply to meet its project employment land demand requirements up to 2026.</p> <p>The ELR also recognised that there would be additional employment land that is currently in use that could contribute to the future supply of land and could help meet the Council's objectives to focus new employment development on sites that are in previous or current employment use.</p>
Summary of ELR Demand Projections (2007-26)	<p>100-170ha</p> <p>Key implication: slight oversupply of land, based on ELR conclusions; range does not include a margin of choice and therefore the ELR recognises the need for the Council to monitor its land throughout the plan period to ensure that supply meets demand.</p>
Use of the Flexibility Factor?	<p>NO –a 'margin of choice' was not applied in the ELR based on discussions and agreement with Trafford Council. It was viewed that a 20% margin of choice was too high as most criteria for location by sector are the same. In addition, it was considered that at 20% other uses such as leisure development (which is an aspiration for the Council) could potentially be restricted from developing.</p>
Summary of District's existing/potential supply of sites	<p>131.9/283.76ha</p> <p>Key implication: Supply concentrated in Trafford Park and Carrington, with modest amounts of office space in Old Trafford and Altrincham Town Centre.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>337ha rising to 357ha incorporating 6% growth factor.</p> <p>Key implication: very high recent levels of past take up rates (17.7ha) distort the Trafford picture, as the highest 3 years of supply occurred within the last 5 years of this data. The 10 year average supply works out at 13.2 hectares per year.</p>
Job growth (GMFM) 2007-27	<p>9.2ha / 27.7ha (net)</p> <p>Key implication: highest growth forecasts behind Manchester City. Particularly strong growth forecast in the B8 industries.</p>
Implications of landless growth for District	<p>Strong role in providing B2/B8 land for development, although it is likely that Trafford Park may accommodate more high density office uses in future along with Altrincham Town Centre.</p> <p>Key implication: Moderate future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> • Trafford has strong prospects for growth in financial and professional services, in IT and a diverse range of manufacturing sub-sectors. • The 100-170ha ELR demand projections did not incorporate the 20% flexibility factor. • The district has 132ha of employment land, potentially rising to 284ha.

WIGAN	Comment
Strengths/weaknesses/aims/potential	<p>The council are keen to turn around the Borough's negative image through improving the infrastructure and opening up the Borough east/west. Wigan retains a range of manufacturing subsectors, particularly mechanical and electrical engineering. Also a concentration of logistics activity, capitalising upon the north/south accessibility of the area. Considerable areas of brownfield land suitable for economic development, although many sites remain constrained due to a variety of historical factors.</p> <p>Key Implication: Considerable transport infrastructure investment (such as the completion of Wigan's inner relief road) likely to improve already established demand for logistics.</p>
Potential growth sector impacts	Wigan is particularly well suited for logistics, engineering & manufacturing and food and drink.
Summary conclusions of ELR	The ELR identified a potential shortfall of 168.04ha of employment land if the top end of the demand projections (335.59ha) were targeted. The ELR recommended including the top-rated Safeguarded Land sites to add a further 84.76ha to the forward supply.
Summary of ELR Demand Projections (2007-26)	<p>265-304ha (ELR recommended 293-336ha 2005-26)</p> <p>Key implication: Potential shortfall of land even if Safeguarded Land sites are included.</p>
Use of the Flexibility Factor?	YES – 20% 'margin of choice' applied in accordance with North West Employment Land Study recommendations.
Summary of District's existing/potential supply of sites	<p>212.22/275ha</p> <p>Key implication: The Core Strategy is seeking to provide around 275ha of employment land, comprising 150ha of existing allocations; over 100ha on proposed key 'strategic' sites (most of which comprise existing Safeguarded Land), plus windfall town centre sites. This figure is below the ELR forecast demand projections.</p>
Revised RSS Policy W3 Demand projections (take-up in past 5 years, excluding 20% flexibility)	<p>234ha rising to 248ha incorporating 6% growth factor.</p> <p>Key implication: past take up rates have lowered in recent years although still relatively high in the sub-regional context.</p>
Job growth (GMFM) 2007-27	<p>-23.1ha / -7.3ha (net)</p> <p>Key implication: Similar growth forecasts to Rochdale, with ongoing declines in B2 manufacturing offset to an extent by relatively strong growth in B1.</p>
Implications of landless growth for District	<p>Limited evidence of landless growth in the recent past; it is considered likely that, given the size and likely uses of the available employment land sites and the ongoing industrial legacy of the area, landless growth will not be a strong determinant for the foreseeable future.</p> <p>Key implication: Lower future prospects for landless growth.</p>
Conclusions re: demand v. supply	<ul style="list-style-type: none"> Wigan has reasonable prospects for growth in logistics, engineering, manufacturing and food and drink. The 265-304ha ELR demand projections incorporated the 20% flexibility factor. The district has 212.2ha of employment land, potentially rising to 275ha. Wigan is weak on readily available quality sites suitable for under-represented sectors such as knowledge base industry to take advantage of its strategic location.



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