

Bolton Council

**Bolton Employment
Land Study**

Executive Summary

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Executive Summary

Introduction

In January 2008 Arup and Keppie Massie were commissioned to undertake an Employment Land Study (ELS) for Bolton Council in order to analyse the future demand and future provision for employment land in Bolton to 2021 in line with the Northwest Regional Spatial Strategy, and beyond the RSS to 2026.

This study will form part of the evidence base of Bolton Council's Local Development Framework (LDF).

Bolton Council is required to assess the future demand for employment land, and evaluate the quality of existing and potential employment land within the Borough in order to create an up to date and balanced portfolio of sites for employment uses to be held within the LDF.

Methodology

The study has involved a comprehensive assessment of the future demand for employment land using a range of quantitative and qualitative methods.

The study has also carried out detailed site assessments on 44 existing and potential sites for employment development. The study has also included a detailed document and policy review and regular meetings between the consultant team and a Bolton Council Steering Group overseeing the work.

Quantitative analysis

An assessment of the demand for employment land has been carried out based on four main techniques:

- Analysis of historic take up rates;
- Analysis of trends in Commercial and Industrial Floorspace in Bolton using Valuations Office Agency data;
- Analysis of data provided through the Greater Manchester Forecasting Model using sectoral employment projections to derive floorspace and land requirements; and
- Analysis of loss of employment land in Bolton, in recent years.

Analysis has used assumptions on employment densities and plot ratios and a range of other factors to produce eight different scenarios for the amount of employment land that may be required in Bolton from 2007 to 2021 and from 2007 to 2026.

Qualitative Analysis

The quantitative analysis was bolstered by a comprehensive process of stakeholder engagement which has included face to face meetings and telephone conversations with a range of stakeholders.

Consultees have included:

- Local commercial agents;
- Local businesses;
- Bolton Strategic Economic Partnership;
- Bolton Council Officers;
- Key individuals in other Northwest organisations including North West Regional Assembly and MIDAS.

Site Assessments

Site assessments have been carried out on 44 sites across Bolton.

Each site was assessed through a combination of site visits and desktop assessments (utilising GIS). Each site was assessed against a number of defined criteria within an assessment matrix under categories, and scored according to a scale of 1-5 based on the strength of its compliance with that criterion.

Demand for Employment Land

The quantitative analysis work concludes that Bolton has a gross requirement for employment land of between 120ha and 160ha from 2007 to 2021 and a further 40ha to 50ha from 2021 to 2026 to produce an overall requirement of between 160ha and 210ha between 2007 and 2026.

Consultation with stakeholders suggests the upper end of this scale is still potentially too high as a major component of growth in demand for land is driven by a projected growth in office based employment that could be accommodated through Bolton's three major redevelopment sites at Loco Works, Church Wharf and Merchant's Quarter. However, the lower end of this scale was considered to present too negative a picture for the Borough and was unlikely to be an accurate reflection of Bolton's actual employment land requirements.

Information provided by Bolton Council regarding the demand from local businesses for additional land to expand or modernise provides further evidence that greater amounts of land may be required.

Overall then, and taking into account qualitative evidence provided by stakeholders and Bolton Council, the study concludes that demand for employment land in Bolton between 2007 and 2026 lies toward the middle of the range suggested by the quantitative demand work. Therefore we conclude that gross demand for employment land in Bolton between **2007 and 2021** is likely to be in the region of **130ha-150ha**. Demand between 2021 and 2026 would be around **45ha**.

Overall this results in a demand of between **175ha and 195ha between 2007 and 2026**, which is equates to **9.2ha to 10.3ha** of employment land take up per year.

Supply of Employment Land

In considering the supply of employment land required to meet the demand, the study carried out a detailed assessment of 44 potential employment sites across Bolton, comprising:

- 17 of the existing allocated employment sites from the Bolton UDP
- 17 sites identified by developers and landowners as potential locations for employment sites and;
- 10 sites identified by Bolton Council around Bolton Town Centre.

The 44 sites collectively add up to around 337 ha.

The site assessments indicate that while most of these sites are both attractive and deliverable from a commercial perspective, few could be considered to represent best practice in planning policy and sustainability terms.

The existing supply of employment land in Bolton as set out in the 2007 Employment Land Resource totalled some 62.37 hectares. However this figure includes:

- Four sites that are among the least commercially attractive in Bolton collectively adding up to around 13 hectares of land.
- Two sites that form part of larger proposals. Site 8E at Horwich Loco Works totals some 16.3 hectares and will form part of the wider development at this site. Site 38E at Cutacre is some 16.7 hectares and is part of the larger Suggested site S25.

Consequently, of the 62.37 hectares of land identified in the 2007 Annual Employment Land Resource, around 13 hectares is commercially unattractive.

A further 33 hectares, at Horwich Loco Works and Cutacre, form part of a larger set of proposals (and may therefore be unavailable while those larger proposals are debated and refined).

Assuming there is up to 49 hectares of commercially attractive employment land in Bolton, this demonstrates the importance of Horwich Loco Works and Cutacre in meeting Bolton's employment land requirements.

Matching Demand with Supply

The study concluded that Bolton Council should seek to ensure that between **175 ha** and **195 ha** of general employment land is provided for the period from 2007 to 2026.

The assessment of supply concluded that there is currently as little as **16** and at most **49** hectares of commercially attractive allocated employment land in the Borough in Bolton's current UDP.

This suggests there is a shortfall of between **126** to **179** hectares of allocated employment land over the period to 2026 that Bolton Council may wish to address.

Other Factors

A number of other factors may impact on the demand for employment land in Bolton. These have been discussed in detail in the report and include:

- nature and disaggregation of the Greater Manchester's sub regional land requirements;
- the capacity of other Greater Manchester districts in terms of employment land availability;
- impact of the Greater Manchester Congestion Charge;
- proportions of mixed use development on employment sites;
- the ongoing extent of 'pent up' demand from potential inward investors; and
- increased employment land losses to non employment uses.

Recommendations

The study makes a number of recommendations:

Retention /De-allocation of Sites

The study recommends that Bolton consider retaining the majority of their Existing Allocated Employment sites but especially sites 38E at Cutacre and site 8E at Horwich Loco Works. These are both large sites and score well against availability and deliverability criteria. Should neither of the wider redevelopment schemes at Cutacre and Horwich come forward, that these sites are part of, these specific sites remain good sites for employment development in the future in terms of the criteria against which they were assessed.

We recommend that Bolton consider two sites as appropriate for de-allocation, Site 36E Singing Clough and Site 31E Gower Street. However it is noted that in the case of Singing Clough there is ongoing work being undertaken on the economic viability of the site which will help inform whether de - allocation should be considered.

The 17 Suggested Sites are the only locations that could provide the size of sites to meet the identified needs of existing employers within Bolton who are seeking to modernise or expand. In determining which, if any, of the Suggested Sites to allocate, Bolton Council will have to consider which of the planning policy and sustainability criteria to attach the most weight to. Therefore there will be merit in Bolton Council considering, as part of the issues and options stage of the Allocations DPD, presenting a series of options to stakeholders that

could both look at Suggested Sites in isolation and/ or options presenting combinations of these sites.

The 10 Town Centre Sites all score well against both availability and deliverability criteria and planning policy and sustainability, as does Suggested Site S02 Church Wharf. Consequently the study recommends that Bolton Council consider allocating all of the Town Centre Sites for employment led mixed use.

Rolling Provision and Phased Release of Land

The study recommends that there be a rolling review of employment land availability to ensure that five years worth of high quality, unconstrained land is readily available for development at any one time. In accordance with the sequential hierarchy, it would be necessary to ensure that the release of any greenfield land allocated for employment use is phased in order to avoid less sustainable sites from comprising the bulk of development.

Review of Greenbelt and Protected Open Land Boundaries

The impact on Bolton's Green Belt and Protected Open Land from development will be a key issue for the LDF. The majority of the Suggested Sites put forward by developers in Bolton lie in the Green Belt or on Protected Open Land in the West of Bolton and score poorly in planning policy and sustainability terms.

The results of the Employment Land Study, coupled with the outcomes of other evidence base studies for other land uses, in particular the Strategic Housing Land Availability Assessment (SHLAA) and other studies such as the Greater Manchester Strategic Flood Risk Assessment (SFRA) will be key considerations in determining the policy approaches adopted in the LDF.

Mixed Use Development

The study concludes that the majority of the sites do not require mixed use development to make them commercially viable. We therefore recommend that Bolton Council give careful consideration to the need for mixed use schemes on the sites identified in this study, and where mixed use is identified to be the most appropriate form of development that in principle they are 'employment led' mixed use schemes.

However, the redevelopment of Horwich Loco Works is predicated upon the comprehensive regeneration of the site to create a mixed residential and employment scheme. If the Council wishes to see this scheme come forward as proposed, and if the parallel Strategic Housing Land Availability Assessment being carried out concludes the site is a good location for housing, the study recommends that Bolton Council consider re-allocating this existing employment site as a comprehensively developed mixed use site.

Meeting Local, Sub-Regional and Regional Employment Land Needs

The issue of sub regional and regional demand for employment land is a key issue for Bolton's LDF to address.

Bolton has commercially attractive potential employment sites in excess of the anticipated local demand for employment land. These sites could contribute towards the employment land requirements of neighbouring local authorities, should they have a shortage of land. In addition Bolton could provide, in Cutacre, a site of potentially sub-regional or regional significance.

Bolton Council should continue working with and developing relationships with neighbouring local authorities to understand the nature of sub-regional and regional employment land requirements and how Cutacre compares to other potential sites of sub-regional or regional significance.

Local Employment Densities and Plot Ratios

As part of regular discussions with local employers, Bolton Council may wish to try and better understand local employment densities and plot ratios, to enable more accurate updates of this work in the future.

Approach to Monitoring

Monitoring is an integral part of plan production. Bolton Council already has good systems in place to monitor development of employment land, and the basis for a strong system to monitor loss of employment land to other uses. However, there are likely to be emerging areas that will identify the need for further development of the LDF monitoring framework in order to have a robust understanding of historic and future trends in the borough.

It is recommended that overall a wider view is taken to the monitoring of employment land and trends in Bolton, which provides a mix of additional contextual and output information to complement that required by CLG.