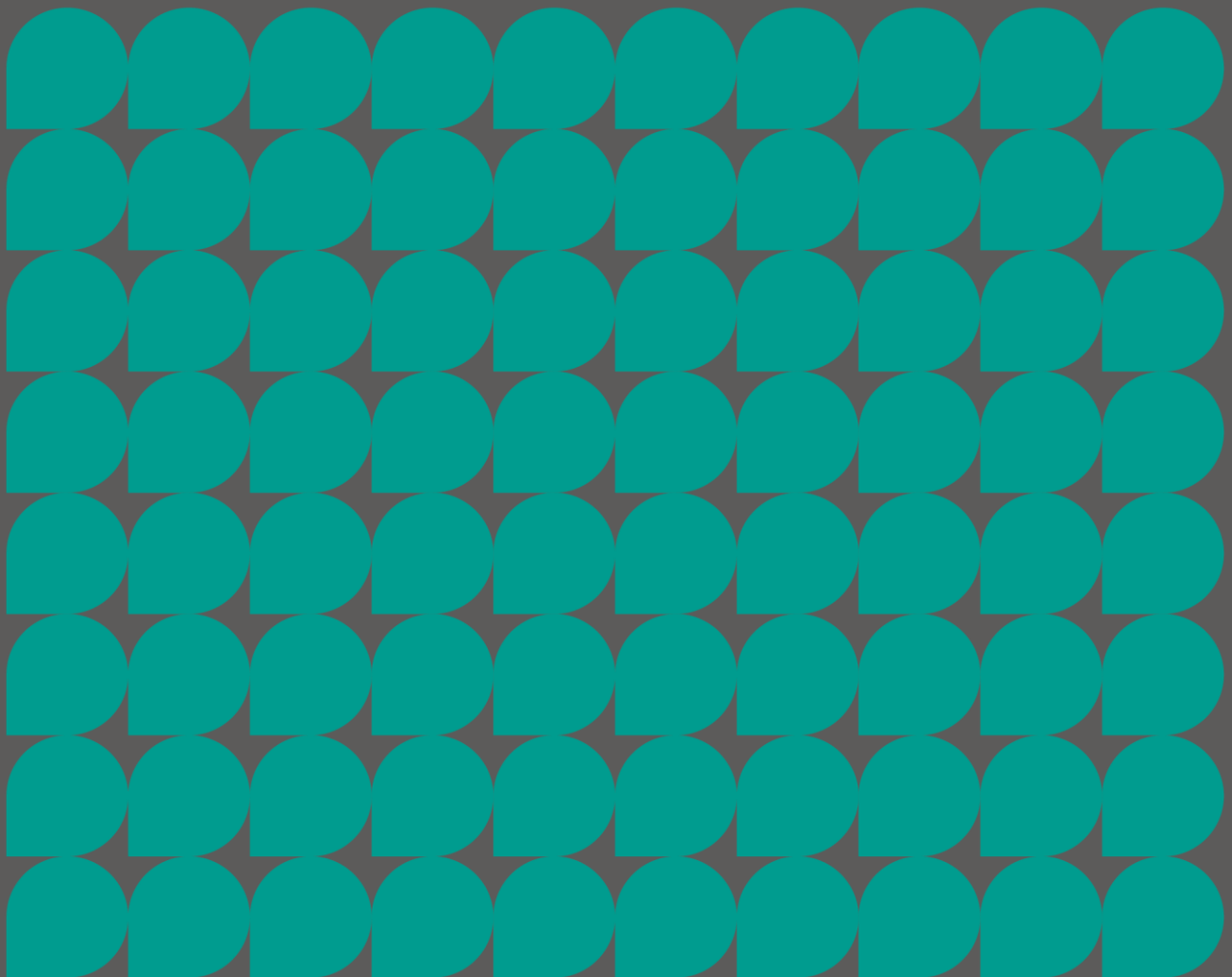


Places for Everyone

Employment Topic Paper

July 2021



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1 Background

- 1.1 In November 2014, the AGMA Executive Board recommended to the 10 Greater Manchester local authorities that they agree to prepare a joint Development Plan Document (“Joint DPD”), called the Greater Manchester Spatial Framework (“GMSF”) and that AGMA be appointed by the 10 authorities to prepare the GMSF on their behalf.
- 1.2 The first draft of the GMSF DPD was published for consultation on 31st October 2016, ending on 16th January 2017. Following substantial re-drafting, a further consultation on the Revised Draft GMSF took place between January and March 2019.
- 1.3 On the 30 October 2020 the AGMA Executive Board unanimously agreed to recommend GMSF 2020 to the 10 Greater Manchester Councils for approval for consultation at their Executives/Cabinets, and approval for submission to the Secretary of State following the period for representations at their Council meetings.
- 1.4 At its Council meeting on 3 December Stockport Council resolved not to submit the GMSF 2020 following the consultation period and at its Cabinet meeting on 4 December, it resolved not to publish the GMSF 2020 for consultation.
- 1.5 As a joint DPD of the 10 Greater Manchester authorities, the GMSF 2020 required the approval of all 10 local authorities to proceed. The decisions of Stockport Council/Cabinet therefore signalled the end of the GMSF as a joint plan of the 10.
- 1.6 Notwithstanding the decision of Stockport Council, the nine remaining districts considered that the rationale for the preparation of a Joint DPD remained.
- 1.7 Consequently, at its meeting on the 11th December 2020, Members of the AGMA Executive Committee agreed in principle to producing a joint DPD of the nine remaining Greater Manchester (GM) districts. Subsequent to this meeting, each district formally approved the establishment of a Joint Committee for the preparation of a joint Development Plan Document of the nine districts.
- 1.8 Section 28 of the Planning and Compulsory Purchase Act 2004 and Regulation 32 of the Town and Country Planning (Local Planning) (England) Regulations 2012 enable a joint plan to continue to progress in the event of one of the local

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authorities withdrawing, provided that the plan has ‘substantially the same effect’ on the remaining authorities as the original joint plan. The joint plan of the nine GM districts has been prepared on this basis.

- 1.9 In view of this, it follows that PfE should be considered as, in effect, the same Plan as the GMSF, albeit without one of the districts (Stockport). Therefore “the plan” and its proposals are in effect one and the same. Its content has changed over time through the iterative process of plan making, but its purpose has not. Consequently, the Plan is proceeding directly to Publication stage under Regulation 19 of the Town and Country Planning (Local Planning) England Regulations 2012.
- 1.10 Four consultations took place in relation to the GMSF. The first, in November 2014 was on the scope of the plan and the initial evidence base, the second in November 2015, was on the vision, strategy and strategic growth options, and the third, on a Draft Plan in October 2016.
- 1.11 The fourth and most recent consultation on The Greater Manchester Plan for Homes, Jobs and the Environment: the Greater Manchester Spatial Framework Revised Draft 2019 (GMSF 2019) took place in 2019. It received over 17,000 responses. The responses received informed the production of GMSF 2020. The withdrawal of Stockport Council in December 2020 prevented GMSF 2020 proceeding to Regulation 19 Publication stage and instead work was undertaken to prepare PfE 2021.
- 1.12 Where a local planning authority withdraws from a joint plan and that plan continues to have substantially the same effect as the original joint plan on the remaining authorities, s28(7) of the Planning and Compulsory Purchase Act 2004 provides that any step taken in relation to the plan must be treated as a step taken by the remaining authorities for the purposes of the joint plan. On this basis, it is proposed to proceed directly to Publication stage under Regulation 19 of the Town and Country Planning (Local Planning) England Regulations 2012.

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Introduction

2.1 As part of the development of Places for Everyone a series of topic papers have been prepared that aim to act as a guide to the background technical information that informs the plan. The topic papers are designed to:

- Explain the reasons for the policies in the plan;
- Summarise and cross-reference the relevant evidence and explain how this has informed the plan;
- Summarise the previous consultation comments that are relevant to the topic;
- Explain how the constituent policies and allocations within the plan have been derived based on the evidence, consultation comments and Integrated Assessment.

2.2 This topic paper focuses on employment and specifically the supply and demand for office and industry/warehousing land across the 16 years of the plan period.

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Policy Context

3.1 This section provides a summary of the key relevant policy documents relating to office and industry/warehousing development. This includes an analysis of:

- National Planning Policy Framework (2019)
- National Planning Practice Guidance
- Build Back Better: Our Plan for Growth
- GM Local Industrial Strategy
- Greater Manchester Strategy 2018

National Planning Policy Framework

3.2 The revised National Planning Policy Framework (NPPF) was updated on 19 February 2019 and sets out the government's planning policies for England and how these are expected to be applied.

Achieving Sustainable Development

3.3 The NPPF outlines that the purpose of the planning system is to contribute to the achievement of sustainable development. Achieving sustainable development means that the planning system has three overarching objectives - economic, social and environmental. Whilst it is recognised that the objectives are interdependent, the emphasis of this topic paper is on how Places for Everyone helps achieve the economic objective.

3.4 The economic objective is: 'to help build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure'.

Presumption in favour of sustainable development

3.5 The NPPF outlines that plans should apply a presumption in favour of sustainable development. This means that:

- Plans should positively seek opportunities to meet the development

needs of their area, and be sufficiently flexible to adapt to rapid change;

- Strategic policies should, as a minimum, provide for objectively assessed needs, as well as any needs that cannot be met within neighbouring areas, unless:
- the application of policies in the Framework that protect areas or assets of particular importance provides a strong reason for restricting the overall scale, type or distribution of development in the plan area; or
- any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in the Framework taken as a whole.

Strategic Policies

3.6 The NPPF outlines that strategic policies should:

- Set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for employment development.
- Provide a clear strategy for bringing sufficient land forward, and at a sufficient rate, to address objectively assessed needs over the plan period. This should include planning for and allocating sufficient sites to deliver the strategic priorities of the area.

Building a strong, competitive economy

3.7 The NPPF outlines that planning policies should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation, and in areas with high levels of productivity, which should be able to capitalise on their performance and potential.

3.8 The NPPF states that planning policies should:

- Set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to

Local Industrial Strategies and other local policies for economic development and regeneration;

- Set criteria or identify strategic sites for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- Seek to address potential barriers to investment, such as inadequate infrastructure, services or housing, or a poor environment; and
- Be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices, and to enable a rapid response to changes in economic circumstances.

3.9 The NPPF also states that planning policies should recognise and address the specific locational requirements of different sectors. This includes making provision for clusters or networks of knowledge and data-driven, creative or high technology industries; and for storage and distribution operations at a variety of scales and in suitably accessible locations.

Supporting a Prosperous Rural Economy

3.10 The NPPF states that planning policies should:

- Enable the sustainable growth and expansion of all types of business in rural areas.
- Recognise that sites to meet local business needs in rural areas may have to be found adjacent to or beyond existing settlements, and in locations that are not well served by public transport.
- Encourage the use of previously developed land, and sites that are physically well-related to existing settlements, where suitable opportunities exist.

Ensuring the vitality of town centres

3.11 The NPPF states that planning policies should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses

(including housing) and reflects their distinctive characters.

Making effective use of land

- 3.12 The NPPF states that strategic policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously-developed or “brownfield” land.
- 3.13 The NPPF also states that planning policies need to reflect changes in the demand for land. Where the local planning authority considers there to be no reasonable prospect of an application coming forward for the use allocated in a plan they should reallocate the land for a more deliverable use that can help to address identified needs (or, if appropriate, deallocate a site which is undeveloped).

National Planning Practice Guidance

- 3.14 The National Planning Practice Guidance (NPPG) states that economic land availability assessments should provide an assessment of land which is suitable, available and achievable for economic development use over the Local Plan period.
- 3.15 The NPPG outlines that economic land availability assessments should:
- Identify sites and broad locations with potential for development;
 - Assess their development potential; and
 - Assess their suitability for development and the likelihood of development coming forward.
- 3.16 The results of the assessment can then be used to:
- Help an authority to identify how much employment development can be delivered;
 - Show whether or not employment development targets can be delivered over the plan period;
 - Demonstrate that a continuous, flexible and responsive supply of employment land can be provided;
- 3.17 Each district has carried out their own assessment of employment land

availability and prepared their own Employment Land Availability Assessments. The Employment Land Supply Statement brings together this information to identify the total employment land supply across the Plan area.

- 3.18 In terms of employment demand the NPPG advises that plan makers should develop an idea of future needs based on a range of data which is current and robust, such as sectoral and employment forecasts and projections, current and future local labour supply, analyses based on the past development and take-up of employment land, current and/or future property requirements, studies of business trends, monitoring of business, economic and employment data and consultation with relevant organisations.

Build Back Better: Our Plan for Growth

- 3.19 In the 2017 Industrial Strategy the Government outlined a cross economy approach designed to boost productivity. Recognising that much had changed since 2017, in March 2021 the Government produced a revised overarching strategy. This new strategy, *Build Back Better: Our Plan for Growth*, is designed to better reflect the economic reality of Covid-19 and the UK's exit from the European Union. The plan included commitments against three 'core pillars of growth' – Infrastructure, Skills and Innovation - these are outlined below.
- 3.20 The Plan also included a range of commitments related to the nature of the growth the Government planned to create. These were aligned against three themes: levelling up the whole of the UK, supporting the transition to Net Zero and supporting the vision for a Global Britain. These are also outlined below.

Infrastructure

- 3.21 The Government committed to:

- Stimulate short-term economic activity and drive long-term productivity improvements via investment in broadband, roads, rail and cities, as part of capital spending plans worth £100 billion in the next year
- Connect people to opportunity via the UK-wide Levelling Up Fund and UK Shared Prosperity Fund, as well as the Towns Fund and High Street Fund, to invest in local areas.
- Help achieve net zero via £12 billion of funding for projects through the Ten Point Plan for a Green Industrial Revolution.

- Support investment through the new UK Infrastructure Bank

Skills

3.22 The Government committed to:

- Support productivity growth through high-quality skills and training: providing additional investment in Further Education and reforming technical education to align the post-16 technical education system with employer demand.
- Introduce the Lifetime Skills Guarantee to enable lifelong learning through free fully funded Level 3 courses, rolling out employer-led skills bootcamps, and introducing the Lifelong Loan Entitlement.
- Continue to focus on the quality of apprenticeships and take steps to improve the apprenticeship system for employers, through enabling the transfer of unspent levy funds and allowing employers to front load apprenticeship training.

Innovation

3.23 The Government committed to:

3.24 Support and incentivise the development of the creative ideas and technologies that will shape the UK's future high-growth, sustainable and secure economy.

3.25 Support access to finance to help enable innovation, including through reforms to address disincentives for pension funds to invest in high-growth companies, continued government support for start ups and scale ups through programmes such as British Patient Capital, and a new £375 million Future Fund

3.26 Develop the regulatory system in a way that supports innovation.

3.27 Attract the brightest and best people, boosting growth and driving the international competitiveness of the UK's high-growth, innovative businesses.

3.28 Support small and medium-sized enterprises (SMEs) to grow through two new schemes to boost productivity: Help to Grow: Management, a new management training offer, and Help to Grow: Digital, a new scheme to help 100,000 SMEs save time and money by adopting productivity-enhancing software, transforming the way they do business.

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Levelling up the whole of the UK

- 3.29 The Government committed to:
- 3.30 Regenerate struggling towns in all parts of the UK via the UK Shared Prosperity Fund and the UK-wide Levelling Up Fund.
- 3.31 Realise its long-term vision for every region and nation to have at least one globally competitive city at its heart to help drive prosperity. This includes City and Growth Deals, £4.2 billion in intra-city transport settlements from 2022-23, and continued Transforming Cities Fund investment to 2022-23.
- 3.32 Establish a new UK Infrastructure Bank in the North of England and relocate 22,000 Civil Service roles out of London.
- 3.33 Strengthen the Union, creating Freeports across the country – including in Scotland, Wales and Northern Ireland – and delivering the Union Connectivity Review, reviewing options to improve our sea, air and land-links across the four nations.

Support the transition to Net Zero

- 3.34 The Government committed to:
- 3.35 Invest in net zero to create new opportunities for economic growth and jobs across the country, including supporting up to 60,000 jobs in the offshore wind sector, 50,000 jobs in carbon capture, usage and storage (CCUS) and up to 8,000 in hydrogen in our industrial clusters.
- 3.36 Grow current net zero industries and encourage new ones to emerge. This includes working with industry, aiming to generate 5GW of low carbon hydrogen production capacity and capture 10Mt CO₂/year using CCUS by 2030, and ending the sale of new petrol and diesel cars and vans in 2030.

Support our vision for Global Britain

- 3.37 The Government committed to:
- 3.38 Cooperate with partners to inspire and shape international action on our domestic priorities, including through our G7 Presidency and COP26.
- 3.39 Role-model openness to free and fair trade, working internationally to strengthen the multilateral system and the World Trade Organization and using preferential

agreements and bilateral trade relationships to directly expand trading opportunities for UK businesses.

- 3.40 Develop a new export strategy to align support for exporters with plans for growth and sectoral priorities, opening UK Government trade hubs in Scotland, Wales and Northern Ireland and increasing UK Export Finance lending capacity.

Greater Manchester Local Industrial Strategy

- 3.41 In June 2019, the Greater Manchester Combined Authority (GMCA), the GM Local Enterprise Partnership (LEP) and the UK Government agreed and jointly published one of the country's first modern local industrial strategies "Good Jobs and Growth – Greater Manchester's Local Industrial Strategy".
- 3.42 The Greater Manchester Local Industrial Strategy outlines a set of long-term policy priorities to help guide industrial development and provides a plan for good jobs and growth in Greater Manchester. The Strategy was co-designed with business, the community, the voluntary and social enterprise sector and citizens. A comprehensive consultation exercise was undertaken, including a 6-week formal consultation.
- 3.43 It sets out how Greater Manchester will build on its unique strengths and opportunities and capitalise on the creativity of people to create a digitally-enabled, green city-region.
- 3.44 It also works to spread the benefits of this prosperity across the city region, delivering inclusive growth, and ensuring competitiveness and job quality in our high employment, low productivity sectors
- 3.45 The Strategy emphasises the city region's strengths which make Greater Manchester a great place to do business, and help to attract new business and new industries, as well as the challenges it faces particularly around skills, infrastructure and health where more focus and investment is needed. The Places for Everyone Joint Plan is one of the key mechanisms to support the delivery of the LIS

Greater Manchester Strategy

- 3.46 The Greater Manchester Strategy 2018 (GMS) sets out an ambition to make Greater Manchester one of the best places in the world. It involves growing the

economy and increases the focus on ensuring that the people of Greater Manchester can all benefit from economic growth.

- 3.47 The GMS 2018 provides the framework for the Greater Manchester's Local Industrial Strategy. It sets out how to build on core economic strengths, including:
 - 3.48 A globally-competitive manufacturing sector, with niche strengths in advanced materials, textiles, chemicals and food & drink.
 - 3.49 A vibrant digital sector, which through assets such as MediaCityUK and the associated tech cluster, make Greater Manchester and surrounding area the UK's second digital hub.
 - 3.50 The region's excellent air connectivity. Manchester Airport now serves over 200 destinations, more than any other UK airport.
 - 3.51 A dynamic regional centre driving growth, and town and district centres which are increasingly important for jobs across the conurbation.
 - 3.52 A significant workforce which includes one of the largest graduate pools in Europe and a strong concentration of STEM graduates.
 - 3.53 The GMS 2018 has specific ambitions to create strong employment locations in all parts of Greater Manchester, with good access from residential areas, in order to achieve a more inclusive and sustainable city region. The GMS 2018 highlights the importance of delivering a strong portfolio of industrial and warehousing locations to ensure that Greater Manchester remains competitive. This will include identifying and bringing forward new locations, bringing forward proposals to unlock stalled industrial developments on previously developed land, and protecting "medium grade" industrial sites.
 - 3.54 The GMS 2018 sets out to address underlying weak market conditions in parts of Greater Manchester and highlights that there are a small number of locations which make a disproportionate contribution to sub-regional economic growth. However, the strategy reinforces the importance of developing the regional centre as the primary driver of economic growth and ensuring that residents from all parts of Greater Manchester have quick, affordable and multi-modal options to access the jobs created. The Places for Everyone Joint Plan has a pivotal role in supporting delivery of many objectives of the GMS 2018, particularly in regard to ensuring that there are opportunities for all residents to access good quality

jobs, wherever they live.

Evidence

- 4.1 This section provides a summary of key evidence relating to office and industry/warehousing development in Greater Manchester. A comprehensive evidence base was assembled to support the policies and proposals in the GMSF 2020. Given the basis on which the Plan has been prepared, this evidence base remains the fundamental basis for the PfE 2021 and has remained available on the GMCA's website since October 2020. That said, this evidence base has been reviewed and updated in the light of the change from GMSF 2020 to the PfE2021 and, where appropriate, addendum reports have been produced and should be read in conjunction with evidence base made available in October 2020. The evidence documents which have informed the plan are available via the GMCA's website.
- 4.2 This section also includes discussion of previous evidence prepared for the Greater Manchester Spatial Framework. The documents summarised are:
- Note on Employment Land Need for Greater Manchester (2021)
 - Note on Covid-19, EU-Exit and the GM Economy (2020 and 2021)

Employment Land Need for Greater Manchester

- 4.3 Work has been undertaken to assess past employment land take-up (or 'completions') in order to consider the future employment land needs of the nine districts for business (offices) and industrial (i.e. manufacturing and distribution), for the 16 years up to 2037.

Method

Data Inputs

- 4.4 The analysis draws upon data provided by the nine local authorities on their completions in the period 2004/05 to 2019/20, a 16-year run of data. The subsequent analysis has focused on extrapolating past trends of employment land take-up from this historic data.

Applying a Margin (of flexibility) for demand

- 4.5 It is standard practice in assessing future needs to add a further figure to any base forecast of need derived from data.
- 4.6 The purpose of the “margin” for demand is to address a variety of factors including:
- Any unforeseen increase in demand for land (i.e. a margin of error linked to the inherent uncertainty of any forecasts of need);
 - Aspirations to increase the overall size and competitiveness of the GM economy; and
 - Accounting for demand which have been suppressed by a lack of supply.

Gross and Net Requirements

- 4.7 Gross additional employment floorspace is calculated as new floorspace completions, plus any gains through change of use and conversions. Net additional employment floorspace is calculated as new gross floorspace completions, minus demolitions, plus any gains or losses through change of use and conversions. Even when net demand is negative or declining, there will be a need for new employment land and floorspace for several reasons:
- As existing employment land/floorspace is lost to other uses
 - Some employment land/premises are underused and/or become unusable and need replacing by more usable land and premises.
 - There is a need for occupiers to find new buildings in more suitable locations.
- 4.8 The use of take-up rates, which are a measure of the gross need, avoids the need to explicitly deal with the gross/net land need issue. This is because past take-up is based on demand from all sources including “new” demand, relocations and the need for modern premises

Office: Justification for the method of assessing quantitative need

- 4.9 The GMCA has previously considered both past take-up and employment forecasting approaches to the assessment of employment land need. As discussed in the ‘Greater Manchester Forecasting Model’ section of this paper, time constraints meant that issuing revising forecasts was not possible in the

development of Places for Everyone.

- 4.10 As such, the analysis for this plan has focussed on past take-up/development rates as the main method of assessing future needs. Previous analysis has concluded that these create broadly similar forecasts of needs for office space as forecast methods. The implication is that past development rates include an allowance that takes into account the gross to net factors as well as vacancy rates in the office stock. By using past development rates, there is an expectation that these relationships will be broadly consistent in the future.

Industrial and Warehousing: Justification of the method for assessing quantitative need

- 4.11 Most employment land studies rely primarily on past take-up as the preferred approach to assessing future needs for Industrial and Warehousing land. Employment forecasting based approaches are generally not used, for the simple reason that such models tend to suggest low or even negative (net) need for employment land which is not a true reflection of actual need.
- 4.12 A further challenge with the use of employment forecasts for Industrial and Warehousing is that across employment land reviews one of most important factors in driving net need are employment forecasts for warehousing/logistics jobs. Any forecast for a single economic sector is inherently less reliable than a combination of several sectors. Furthermore, any forecast requirement is particularly sensitive to the assumptions about employment densities – i.e. standard calculations about how many workers correspond to a unit of floorspace. Whilst there are suggested guidelines, the range set out in these is wide 70 sqm per FTE job for a “Final Mile Distribution Centre” to 90 sqm per job for a “National Distribution Centre” and can significantly alter the results depending on choice of use.
- 4.13 The most common method used is therefore to take past take-up, worked out an annual average then extrapolated forward over the relevant plan period. This is the method used in Places for Everyone.

The process of identifying quantitative demand

- 4.14 In summary, there are three steps used to assess the quantum of future need/demand:
- Step 1: Assess the average historic take-up/development rate. The period

covered by the data is the 16 years from 2004/2005 to 2019/20.

- Step 2: Assess the implications of different weightings applied to the different parts of the time period to address the question of the appropriateness of the time period covered by past data;
- Step 3: Apply a demand margin

The Assessment of Office Needs

4.15 The following methodology has been developed for Office space:

- Step 1: The average actual historic take-up/development rates has been calculated based on past trends. The period covered by consistent data is from 2004/05 to 2019/20. The longer the time period chosen the more likely the average will be representative of typical historic annual needs.
- Step 2: A consideration of the appropriateness of the historic time period has been made due to past trends incorporating a once in a generation UK recession and a weighting applied to account for atypical years; this has resulted in a modest adjustment of 2.2%.
- Step 3: a margin of flexibility has been added to account for recent evidence of demand for office space; the inherent uncertainties in any forecasting exercise; and the aspiration to increase the overall size and competitiveness of the GM economy. This is 31% based on previous studies and advice provided.

4.16 Steps 1 to 3 give an office demand requirement of **1,910,000 sqm** (rounded), equivalent to around **119,000 sqm per annum** across the 16-year plan period.

4.17 The outputs from the three steps are summarised below:

Adjustments	Plan Period Floorspace (sqm)	Annual Floorspace (sqm)
Step 1: Past completions rate – unadjusted	1,452,000	88,000
Step 2: Reweighting (+2.2%)	1,453,000	90,800
Step 3: Demand uplift (+31%)	1,910,000	119,000

The Assessment of Industrial and Warehousing Needs

4.18 The following methodology has been developed for Industrial and Warehousing space.

- Step 1: The average actual historic take-up/development rates has been calculated based on past trends. The period covered by consistent data is from 2004/05 to 2019/20. The longer the time period chosen the more likely the average will be representative of typical historic annual needs.
- Step 2: An assessment of the appropriateness of the historic time period has been made due to past trends incorporating a once in a generation UK recession and a weighting applied to account for atypical years, this has resulted in a modest adjustment of 3.8%.
- Step 3: a margin of flexibility has been added to account for recent evidence of strong demand for Industrial and Warehousing space indicating demand may have been suppressed by a lack of supply; the inherent uncertainties in any forecasting exercise; and the aspiration to increase the overall size and competitiveness of the GM economy. This is set at 31% based on previous studies and external advice provided.

4.19 Steps 1 to 3 give an Industrial and Warehousing demand requirement of **3,330,000 sqm** (rounded), equivalent to **208,000 sqm** per annum across the 16 year plan period. The outputs from the three steps are summarised below:

Adjustments	Plan Period Floorspace (sqm)	Annual Floorspace (sqm)
Step 1: Past completions rate – unadjusted	2,444,000	152,600
Step 2: Reweighting (+3.8%)	2,534,000	158,400
Step 3: Demand uplift (+31%)	3,330,000	208,000

Covid-19, Brexit and the Greater Manchester Economy

4.20 Following the emergence of Covid-19 in early 2020, the Greater Manchester Combined Authority commissioned analysis on the impacts of the pandemic and

their effect on the evidence to be considered as part of the development of the GMSF 2020. This evidence was revisited and enhanced in March 2021 as part of the preparation of the PfE 2021 plan to bring it up to date with latest information on the Covid-19 pandemic and the impact of the agreement of the Trade and Co-operation Agreement with the European Union and the ending of transition arrangements at the end of December 2020. The revised analysis also focussed on any specific considerations associated with the movement to a plan for nine local authorities. The findings of the revised work are summarised below across four themes:

- The evidence on the economic impacts of Covid-19
- The evidence of the impact of the new trading and other arrangements for the UK and the EU under the December 2020 Trade and Co-operation Agreement (TCA)
- The evidence on the likely medium and longer term impacts of Covid-19 and EU-Exit; and
- The implications for economic growth in Greater Manchester over the term of the plan

4.21 The paper examines these impacts for the entire GM economy (rather than the nine PfE authorities) for two reasons:

- In many instances, monitoring data is only available at a Greater Manchester level and as such disaggregation of data below this is not possible
- Many of the economic effects of Brexit and Covid-19 (and the related support) have manifested on a national or regional basis making these a more appropriate scale for this analysis.

Economic impacts of Covid-19

4.22 The impact of Covid-19 has had an unprecedented impact on the UK economy over what is a particularly short period of time compared to other recessions. The main economic effects started emerging in March 2020. Although the full formal lockdown started on 23 March 2020, this had been preceded by earlier advice from government, the cancellation of many events and activities and changes in consumer and business behaviour. April and May 2020 were periods

of near total lockdown and severe contractions in economic activity. There were signs of recovery towards the end of May and June 2020 as the lockdown was loosened. The economy gradually recovered during the summer and early autumn, before a second national lockdown in England in November, and then the third one starting on 6th January 2021.

- 4.23 The economic effects of these lockdowns were severe. Economic activity contracted as businesses were forced to close or faced restrictions on their ability to trade. Confidence amongst both consumers and businesses was severely impacted. Government initiated large scale support programmes for employees unable to work (the Coronavirus Job Retention Scheme), for self-employed individuals facing lower income (the Self-Employment Income Support Scheme) and for businesses (Bounce Back Loan Scheme, Coronavirus Business Interruption Loan Scheme and a range of other loans grants and payment holidays).
- 4.24 Analysis of the effects of both the impact on the economy and the use of these support schemes suggests that the GM economy's size and diversity mean that it did not diverge too radically from the path of overall UK-level impacts from Covid-19.
- 4.25 The key conclusions are that:
- The labour market (in terms of claimant count) in GM has been slightly harder hit to date than the overall picture for the UK and this impact is on top of a labour market which, in parts, was slightly weaker than average.
 - The evidence from the number and share of workers supported by the furlough scheme is that this level of exposure in GM is in line with the national average.
 - The structure of the GM economy at a broad level means it, potentially, has been very slightly more susceptible to the economic shock of Covid-19 than the UK average. However, this conclusion needs to be treated cautiously as the actual impacts will depend on the detailed structure of the GM economy relative to the UK.
- 4.26 In summary the evidence to date suggests that GM has fared broadly in line with the UK economy so far and there are few "stand out" differences. In spite of the changes since August 2020, given the high degree of uncertainty that exists about future events and their implications for GM, there is not sufficient

certainty/evidence currently available as of March 2021, to inform a robust “reasonable alternative” growth option for purposes of the PfE.’

Impact of the new trading and other arrangements for the UK and the EU under the December 2020 Trade and Co-operation Agreement

- 4.27 The UK and EU Trade and Cooperation Agreement was agreed on 24th December 2020. As a result, the UK left the Single Market and the Customs Union at the end of 2020 after the end of the transition period. Rather than revert to WTO trading terms with the EU, the TCA sets out the parameters for the UK’s relationship with the EU in trade and a range of other matters.
- 4.28 In the short term, the TCA avoided the “cliff edge” that would have been the consequence of a no-deal Brexit (in effect reverting to trade on WTO terms). However, there has still been significant disruption to trade with the EU since the start of 2021. Surveys by The Growth Company in Greater Manchester conducted between 29 March and 26 April showed 19% of GM firms reporting a negative impact from EU-Exit, around 47% of firms reported a 'neutral' impact, with around 30% being 'unsure' and just 6% reporting a 'positive' impact.
- 4.29 Feedback from business representative organisations suggests a number of emergent issues related to duties, VAT, haulage costs, labelling and product regulations that are impeding export activity. Some businesses are reporting that they do not see the EU as a viable export market in the short-term. At this stage, quantitative data on the impact on the GM economy, and particularly on international trade, remains relatively sparse and so it is difficult to estimate the overall scale of these issues.
- 4.30 In conclusion, there have undoubtedly been significant early adjustment problems as a result of EU-Exit (and the late conclusion of the TCA) that have had an adverse impact on the UK economy in the first quarter of 2021 (on top of the impacts of Covid-19). The evidence from the Growth Company survey suggests as is to be expected this is highly likely to be the case for GM as well.

Medium and longer term impacts of Covid-19 and EU-Exit

- 4.31 The estimates of the longer-term effects of EU-Exit range from reductions of 2% to 3% in GDP up to reductions of 6% to 7% of GDP. These are not estimates of direct falls in GDP compared to now, but reductions in the future size of the UK economy and so the future rate of growth of UK GDP over a 5 to 10 year period compared to a no EU-Exit scenario.
- 4.32 There is limited analysis or information on the longer term impacts of EU-Exit as it might impact on the GM economy, or whether the effects will be greater or less than at a UK level. There is also still a degree of uncertainty about the period over which impacts will occur and their sectoral focus. Previous work by the GMCA in 2018 identified that exports of goods from GM to the EU were contributed a higher proportion than for the UK as a whole (58% of goods exports from Greater Manchester firms – compared with 42% England as a whole), suggesting that the GM economy may be somewhat more vulnerable than average although this conclusion cannot be definitively drawn.

The implications for economic growth over the term of the plan

- 4.33 Given the significant degree of uncertainty that exists about future events and their implications, there is not sufficient certainty/evidence currently available to inform a robust alternative economic projection for purposes of the plan.
- 4.34 This conclusion is reached due to the following factors:
- Events continue to unfold and data to emerge on how the UK and GM economy is performing and what health, social and economic consequences of Covid-19.
 - There is still an unusually wide range of uncertainty about the short to medium economic effects at a UK level and its recovery and growth path. There are a range of views, for instance as between the OBR and the Bank of England, as to the medium and longer term implications of Covid-19 on UK growth prospects.
 - There are also unfolding impacts on the relationship between the economy, consumer and business behaviour and property needs that will have land-use implications. However, it is not clear at present what the net effects will be and to what extent very recent effects will prove long lasting.

- The longer term implications of Covid-19 on future housing need are not clear.

Previous Evidence

The Greater Manchester Forecasting Model (2019)

- 4.35 Previous projections of employment land demand for the Greater Manchester Spatial Framework have included the preparation of external economic forecasts known as the Greater Manchester Forecasting Model. These were supplemented with a further set of projections setting out the nature of the economic change if GM's economy grew at an accelerated rate. This was known as the Accelerated Growth Scenario (AGS). The AGS was used to inform the estimates of employment land needs under GMSF.
- 4.36 Unlike the full GMFM, the AGS was developed only at a Greater Manchester level and did not provide a breakdown by individual districts. Consequently, it was not possible to identify and disaggregate the forecasts for the nine authorities as part of the preparation of Places for Everyone. Given the time constraints of preparing the plan it was also not possible to commission new external forecasts.
- 4.37 As such, the projections of employment land need in the plan are based on the past completions approach to assess future employment needs for the nine authorities. Previous projections developed for GMSF 2020 showed that both the forecast and the past completions methods created broadly similar estimates of employment land need. Therefore, it was considered reasonable to proceed using only the completions approach in order to maintain the momentum in the plan preparation process.
- 4.38 The previous projections from GMFM are still included as a supporting document to the plan for reference.

Northern Powerhouse Independent Economic Review (2016)

- 4.39 The Northern Powerhouse Independent Economic Review (NPIER) provides a rigorous assessment of the factors driving the North's economic performance and the industries and sectoral strengths that could lead the economic growth of the North to 2039. The NPIER shows that the North has four prime capabilities which can compete on the national and international stage (Advanced

Manufacturing, Energy, Health Innovation, and Digital), alongside three enabling capabilities (Financial & Professional Services, Education, and Logistics) that support the prime capabilities and combine to create a complementary and distinctive offer.

4.40 Whilst the ambitions of the review remain aligned to those of Greater Manchester, the time that has passed since its publication mean that it does not include specific consideration of the UK's exit-from the European Union or of Covid-19. As such it is not included as supporting evidence for the plan.

Summary of Consultation

- 5.1 The second draft of the GMSF was published for consultation between January and March 2019. 1,730 comments were made on the Prosperous Greater Manchester Chapter of the GMSF 2019. Concerns were raised that there was limited alignment between the Greater Manchester Economic Strategy and the location of employment sites. Many respondents questioned the approach used to calculate Greater Manchester's employment floorspace needs however there was no consensus on the implications of this as comments were received stating that the GMSF both under and overestimated the need for employment land.
- 5.2 It was highlighted that the GMSF does not explicitly identify the scale of economic growth that it is seeking to deliver (in terms of job numbers or GVA) and concerns expressed that employment growth is not supported by sufficient housing provision.
- 5.3 The responses received informed the production of GMSF 2020. The withdrawal of Stockport Council in December 2020 prevented GMSF 2020 proceeding to Regulation 19 Publication stage and, given the circumstances outlined at the beginning of this Topic Paper, these responses have informed PfE 2021.
- 5.4 The comments made and the responses to them are set out in the Statement of Consultation (October 2020), however a summary of the key issues raised in relation to employment matters is set out below.

Land requirement

- 5.5 Views that the need for employment land has been both over-estimated and under estimated.
- 5.6 There is adequate capacity to meet employment floorspace requirements on previously developed land.
- 5.7 Too much land is being released to meet the stated needs.
- 5.8 Uplifts in relation to past completion rates appear to be arbitrary and without justification.
- 5.9 Green Belt land is mainly being released for low skilled jobs.

Response

- 5.10 As explained elsewhere in this topic paper, further evidence has been produced in relation to the employment land demand over the life time of the plan period.
- 5.11 The evidence shows that the demand for Industry and Warehousing land is for around 3.3million sq m of land to be released for development up to 2037.
- 5.12 In terms of demand for office floorspace, the evidence shows a need for almost 2 million sq m of new office space up to 2037.
- 5.13 The land supply data set out in tables 6.1 and 6.2 (and on MappingGM) demonstrates that sufficient land has been identified over the course of the Plan to meet this need.

Distribution of employment land

- 5.14 There's limited alignment between the Greater Manchester Economic Strategy and the location of employment sites.
- 5.15 Identification of sites in the north is welcomed.
- 5.16 Growth in the south of the conurbation should not be constrained to enable growth in the north.
- 5.17 There is insufficient evidence to demonstrate deliverability of the strategic employment/mixed-use allocations.
- 5.18 Insufficient analysis of the market demand in identifying sites and distribution.

Response

- 5.19 The economic strategy in PfE complements that within the Local Industrial Strategy.
- 5.20 The strategy maximises the potential of key growth locations across the conurbation.
- 5.21 These locations range from core conurbation areas such as the City Centre, the Quays and Trafford Park to new areas that will boost the competitiveness of the north as well help to sustain the competitiveness of the south.

Employment projections

27

- 5.22 The approach used to calculate Greater Manchester's employment floorspace needs is challenged.
- 5.23 It is unclear as to what the employment land projections have been based on, for example on historic take-up rates and/or past completions.
- 5.24 It is unclear what assessment has been taken as to the impact of the availability of sites and premises on past take up rates.
- 5.25 GVA growth should be used to forecast future industrial.

Response

- 5.26 Unlike with calculating housing need, there is no standard methodology for calculating employment land demand. However, the approach followed in the employment land demand paper is not unique.
- 5.27 The evidence considers how past completions have been constrained by the lack of suitable sites.
- 5.28 The evidence looks at ways the city-region can respond to evolving business requirements and increasing globalisation.

Commensurate housing provision

- 5.29 Employment growth is not supported by sufficient housing provision and therefore could result in insufficient local labour being available.
- 5.30 Mismatch of skills for new jobs and resident population therefore houses need to be provided to attract the right skills.

Response

- 5.31 The housing need has been calculated using the standard methodology as anticipated by NPPF.
- 5.32 It is considered that the right level and mix of homes needed to support the economic growth has been identified in the plan.

Econometric forecasts

- 5.33 The GMSF does not explicitly identify the scale of economic growth that it is

seeking to deliver in terms of job numbers or GVA.

- 5.34 The GMSF is predicated upon a significant decline in job growth.
- 5.35 The GMSF should plan for an annual job growth of at least 0.8% to 1.0% per annum.
- 5.36 The employment forecasts suggest job losses in four of the northern GM authorities – Oldham, Rochdale, Tameside and Wigan, undermining the ambition of boosting northern competitiveness.

Response

- 5.37 Unlike for housing, there is no prescribed method for identifying the employment land need.
- 5.38 The employment land demand paper sets out the method used.

Employment land existing supply

- 5.39 It is not clear whether such sites are suitable, viable or attractive to the market.
- 5.40 The evidence suggests it is mainly poor quality and heavily constrained and there is no evidence to suggest that this has been taken into consideration.
- 5.41 No evidence as to what impact the housing strategy will have on the existing supply of employment land.

Response

- 5.42 The level of land supply identified is sufficient to meet the employment land demand up to 2037.
- 5.43 The existing employment land supply is that which is identified through the district employment land availability assessments in line with national guidance, including having taken into account whether or not it would be appropriate to reallocate any sites.
- 5.44 The level of existing land, it is considered and appropriate to supplement the land supply for industry and warehousing through the identification of sites within the GMSF.

Summary of Integrated Appraisal

- 6.1 The GMCA commissioned ARUP to complete an Integrated Assessment of the GMSF / PfE Joint Plan.
- 6.2 The IA is a key component of the GMSF evidence base, ensuring that sustainability, environmental quality and health issues are addressed during its preparation. The IA combines the requirements and processes of the Sustainability Appraisal, Strategic Environmental Assessment, Equality Impact Assessment, and the Health Impact Assessment into one document. The Habitat Regulation Assessment of the GMSF was completed separately by GMEU. The IA carries out an assessment of the draft GMSF policies by testing the potential impacts and consideration of alternatives against IA objectives. This ensures that any potential impacts on the aim of achieving sustainable development are considered and that adequate mitigation and monitoring mechanisms are implemented.
- 6.3 Each draft of the plan has been supported by an IA. The 2020 IA provides a narrative detailing how the recommendations from the 2019 IA were considered in the development of the policies in the GMSF Publication Plan 2020. In some cases the recommendations resulted in changes to the policy wording, but in many cases was considered that the recommendations are addressed by the Plan's thematic policies, because the Plan needs to be read as a whole. The GMSF 2020 IA highlights that the employment policies have many synergies in relation to the IA objectives and a large number of positive impacts are identified.
- 6.4 The employment policies in PfE 2021 will have substantially the same effect on the nine districts as those in GMSF 2020. This is reflected in the 2021 IA Addendum which does not alter the 2020 IA scoring of employment policies in relation to the IA Framework. The outcome of the 2020 assessment of the employment policies in the GMSF 2020 is summarised below.

GM-P 1 (now JP-J 1) – Supporting Long Term Economic Growth

Synergies with the IA framework

- 6.5 Policy GM-P 1 (now JP-J 1) is the overarching policy within the Economic

Development chapter. The policy generally has synergies with the housing, employment and transport objectives.

2019 IA – recommended enhancement and mitigation

- 6.6 The IA concluded that due to its strategic nature, many of the assessment criteria were not suitable for inclusion within policy wording. However, a number of recommendations were suggested. The policy is focused on more high value sectors and employment, but it should seek to create a sustainable economy and provide employment for all skill levels.
- 6.7 The policy could provide greater detail including making clearer the links between housing and employment land, employment and growth and supporting and providing education and training, making the most of transport assets and making the transport infrastructure fit for purpose and that growth is sensitive to existing wildlife and geological sites, and where possible enhancement is encouraged of existing assets. It should also ensure that growth and development is sensitive to climate change, utilising mitigation where necessary.

2020 updated position

- 6.8 The IA concluded that the policy had been strengthened in a number of places and as a result of amendments to the policy, a small number of the scores against some objectives have been improved. However, much of the mitigation proposed in 2019 is addressed in other policies of the GMSF, which needs to be read as a whole. For example, Policy GM-E 5 (now JP-P5) deals with employment and skills, Our Network (now Connected Places) covers transport policy and digital connectivity and Policy GM-E 6 (now JP-P6) covers health inequality.
- 6.9 Similarly, Greener GM (now Greener Places) covers biodiversity, geodiversity and green infrastructure and Sustainable and Resilient Greater Manchester (now Sustainable and Resilient Places) deals with matters of energy efficiency, low carbon and renewable energy and greenhouse gas emissions.
- 6.10 The 2020 IA did however consider that to strengthen the policy further, specific reference should be made to climate change and climate emergency within this policy or within the appropriate policies in the Sustainable and Resilient Chapter. It was also suggested that further links could be made here or elsewhere in the plan to deprivation & inequalities and matters of accessibility.

- 6.11 In response to the 2020 IA further amendments were made to the GMSF and as identified in the IA Addendum Report, it was considered that the changes to place greater emphasis on climate emergency, its impacts and net zero development, would result in the plan overall performing better against the IA Framework. For those policies that were not specifically amended in this regard (such as GMP1, now JP-J1), it is considered policy within the Sustainable and Resilient chapter primarily addresses the mitigation proposed. Additionally, more detail was added within the supporting text of the plan to explain how climate change ambitions can be met through policy, albeit with the need to give consideration as to how this will be delivered at the local level.
- 6.12 A similar conclusion was reached in relation to changes made to mitigate the impact in relation to deprivation and inequality and accessibility matters.
- 6.13 Following a review of the relevant policies against IA objectives, the 2020 IA Addendum Report considered that overall, the changes made would result in an improvement against the IA Framework.

GM-P 2 (now JP-J 2) – Employment sites and premises

Synergies with the IA framework

- 6.14 The IA concluded that the policy has strong correlations with IA objective 2 as it is focused on employment sites and premises.

2019 IA – recommended enhancement and mitigation

- 6.15 The 2019 IA recommended that the policy should make reference to linking new employment sites to existing housing areas, where this would be appropriate. It should also seek to maximise education and training in relation to the provision of jobs, although it acknowledges that there is a policy focused on education and training. The policy should make reference to employment sites near to existing transport infrastructure being prioritised and encourage the use of active modes of transport or public transport for access to the site. The policy should also refer to seeking opportunities for sustainable design and the creation of green spaces including "buffer" zones between housing and employment and linking sites through green and blue corridors.

- 6.16 The policy has been strengthened to reference employment land being well connected to residential areas. However, much of the mitigation proposed in 2019 is addressed in other policies of the GMSF, which needs to be read as a whole. For example, education and training is addressed by Policy GM-E 5 (now JP-P5), tackling inequalities is covered within Policy GM-E 1,(now JP-P1). Policies in relation to green and blue infrastructure are contained within Greener Greater Manchester (now Greener Places).
- 6.17 No amendments have been included to reference accessible design standards within employment spaces. Policies in Our Network (now Connected Places) and Our Strategy (now Strategy) set out the expectation in relation to public transport, active travel and the transport network.
- 6.18 Sustainability issues are addressed in the Sustainable and Resilient Chapter, whilst design is addressed in Greater Manchester for Everyone (now Places for People).
- 6.19 However, it was considered that whilst Policy GM-E 1 (now JP-P1) references social inclusivity, Policy GM-P 2 (now JP-J2) or Policy GM-E 1 (now JP-P1) could be more explicit in terms of tackling inequality. The Policy could also be more explicit in terms of accessible standards, enabling access for all.
- 6.20 In response to the 2020 IA further amendments were made to the GMSF and as identified in the IA Addendum Report, Policy GM-P 2 (now JP-J2) now makes it clear that employment opportunities will help to tackle inequalities. Similarly, the IA Addendum Report acknowledges that Policy GM-P 2 (now JP-J2) now includes reference to 'accessible' premises or improving accessibility where necessary.
- 6.21 Where no changes to the individual policies have been made against recommended IA mitigation, other policies within the 2020 draft GMSF which primarily address the mitigation have been noted in the 2020 IA Addendum report. The report concludes that this demonstrates the overall improvement of the 2020 draft GMSF in relation to the IA Framework.

GM-P 3 (now JP-J 3) – Office Development

Synergies with the IA framework

6.22 The policy is focused on the provision of office space in Greater Manchester which will increase and expand the employment offer. The key locations outlined (City Centre, The Quays, Manchester Airport Enterprise Zone and town centres) should ensure that office space is located near to housing. Equally, these locations are considered to be the most likely areas that are well connected and well served by infrastructure due to their location and the existing provisions that are located within them. The policy is therefore well aligned with IA objectives 2, 3 and 9.

2019 IA – recommended enhancement and mitigation

6.23 The policy is focused entirely on the provision of office space and as this correlates to employment, it may be desirable to link to aims associated with deprivation. As development near to deprived areas is not a guarantee that there will be a positive impact the policy should consider how to ensure economic benefits flow into the local area.

6.24 Equally, policy should seek to maximise education and skills potential from new development (although it is noted this may be more appropriate for the education, skills and knowledge policy).

6.25 The policy should highlight potential for negative air quality effects from new employment land use. Similarly, there are tensions between new development and objectives to reduce carbon emissions. This could be linked to the air quality and sustainable transport objectives, by promoting walking, cycling and the use of public transport as methods to access office space.

6.26 The developments discussed have potential to affect local landscape, townscape and specific views. Linked to this, the policy should encourage opportunities for green space creation in new development, including creation of multifunctional green infrastructure.

2020 updated position

6.27 The 2020 IA acknowledged that much of the mitigation proposed in 2019 is addressed in other policies of the GMSF, which needs to be read as a whole. For example, the role of the economy in reducing deprivation and social inclusion, is covered by Policy GM-E 1 (now JP-P1) which addresses social inclusivity; education is addressed by Policy GM-E 5;(now JP-P5); sustainable travel modes and active travel is covered in policies within the “Our Network”

(now Connected Places) Chapter and; appraising wildlife, ecological and geological sites is addressed by policies in “Greener Greater Manchester” (now Greener Places) and “Our Strategy” (now Strategy) as is the seeking of opportunities for new and existing green space, blue networks or ecological networks.

- 6.28 The 2020 IA did conclude however, that whilst Policy GM-E 1 (now JP-P1) references social inclusivity, it is considered that Policy GM-P 3 (now JP-J3) or Policy GM-E 1 (now JP-P1) could be strengthened further by explicitly referencing accessibility standards within employment spaces.
- 6.29 In response to the 2020 IA, further amendments were made to the GMSF and as identified in the IA Addendum Report, GM-P 3 (now JP-J 3) supporting text has been amended to highlight reducing deprivation through inclusive growth. Policy GM-P 3 (now JP-J3) has also been amended to make provision for improving standards of accessibility.
- 6.30 Where no changes to the individual policies have been made against recommended IA mitigation, other policies within the 2020 draft GMSF which primarily address the mitigation have been noted in the 2020 IA Addendum report. The report concludes that this demonstrates the overall improvement of the 2020 draft GMSF in relation to the IA Framework.

GM-P 4 (now JP-J4) – Industrial and Warehousing Development

Synergies with the IA framework

- 6.31 Links between this policy and housing predominantly relate to connectivity between housing and employment. This policy performs well against the IA employment assessment criteria as it contributes to employment land across Greater Manchester. The policy states that “a high level of choice and flexibility will be provided in the supply of sites” and highlights that there will be a focus on offering a range of opportunities, making the most of the key locations and increasing the supply of high-quality sites across the northern areas.

2019 IA – recommended enhancement and mitigation

- 6.32 There is no explicit mention of how development might support education and

training or deprivation. There is also no reference to the transport and transport infrastructure (including public transport and active travel) that may be needed. The policy should also seek mitigation for negative air quality effects from new industrial and warehousing land use, including freight and other associated trips from staff and commercial trips that may have health implications. Similarly, there are tensions between new development and objectives to reduce carbon emissions and accessibility should also be considered, e.g., for disabled people in design.

- 6.33 The policy makes no reference to protection of landscape, townscape or heritage assets. The policy should also encourage opportunities for habitat enhancement and connectivity relating to existing and proposed green spaces. This will have a range of benefits including biodiversity, amenity and health.
- 6.34 Particularly on the larger sites, there is potential for improvements to the utilities and digital network, which should in turn contribute to the success of the sites.

2020 updated position

- 6.35 The policy has been strengthened to reference the promotion and support of sustainable travel modes. However, as the 2020 IA acknowledged much of the mitigation proposed in 2019 is addressed in other policies of the GMSF, which needs to be read as a whole. For example, education facilities and links to enhancing skill levels is covered by Policy GM-E 5 (now JP-P5) which covers skills, education and knowledge. Similarly, digital connectivity and utilities infrastructure is addressed by Policies GM-N 2 (now JP-C2) and GM-N 4 (now JP-C4). Policy GM-E 1 (now JP-P1) ensures development is connected across GM and beyond by transport and digital infrastructure. Opportunities for new and existing green spaces is addressed in the Greener Chapter.
- 6.36 As a result of amendments to the policy, a small number of the scores against the IA Objectives have been improved. It is however considered that the policy could be further strengthened through specific reference to accessible design standards or within an appropriate thematic policy.
- 6.37 In response to the 2020 IA, further amendments were made to the GMSF and as identified in the IA Addendum Report, new supporting text in GMP 4 references continued provision to reduce inequalities. Policy GM-P 4 (now JP-J4) also now includes reference to 'accessible' premises or improving accessibility where necessary. Additionally the supporting text for GM-P 4 (now JP-J4) has been

updated to promote and support access to sites and premises by sustainable modes of transport.

- 6.38 Where no changes to the individual policies have been made against recommended IA mitigation, other policies within the 2020 draft GMSF which primarily address the mitigation have been noted in the 2020 IA Addendum report. The report concludes that this demonstrates the overall improvement of the 2020 draft GMSF in relation to the IA Framework.

Employment Land Supply

- 7.1 The Places for Everyone Employment Land Supply (PfE ELS) forms a key component of the evidence base to support the delivery of employment to meet adopted employment floorspace targets set through the Places for Everyone plan and assesses the supply of employment land against employment floorspace requirements.
- 7.2 Each of the nine districts has carried out their own assessment of employment land availability. The PfE ELS brings together information from each of the nine districts to identify the total employment land supply across the plan area.
- 7.3 The districts have compiled their baseline supply with a base date of 1 April 2020. In order to reflect the start of the plan period moving to 1 April 2021 and to avoid delays in plan preparation which would be required for all districts to produce a 2021 employment land supply assessment, a deduction has been made from the April 2020 land supply to account for employment completions in 2020/21. This is based on the target proposed for 2020/21 in the October 2020 Publication GMSF.
- 7.4 The tables below summarises the existing employment land supply position as at 1 April 2021. Note that this excludes the allocations proposed through the Places for Everyone plan.

Office Land Supply

District	Brownfield	Greenfield	Mix	Total 2020 - 37	Estimated completions 2020-21	Total 2021-37 (sq m)
Bolton	79,984	3,447	10,512	93,943	-3,364	90,579
Bury	11,721	28,485	-	40,206	-519	39,686
Manchester	2,225,961	102,514	-	2,328,475	-116,061	2,212,414
Oldham	59,272	-	11,554	70,826	-9,207	61,619
Rochdale	18,462	81,249	-	99,711	-4,676	95,036
Salford	348,611	-	-	348,611	-11,035	337,576
Tameside	26,432	-	-	26,432	-530	25,902
Trafford	243,428	15,000	-	258,428	-1,327	257,101
Wigan	-	2,055	7,294	9,349	-	9,349
Total	3,013,871	232,750	29,360	3,275,981	-146,718	3,129,263

Industry and Warehousing Land Supply

District	Brownfield	Greenfield	Mix	Existing Supply 2020-37	Estimated Completions 2020-21	Existing Supply 2021-37 (sq m)
Bolton	252,156	15,673	8,653	276,482	8274	268,208
Bury	3,731	6,500	-	10,231	750	9,481
Manchester	13,745	64,004	-	77,749	10107	67,641
Oldham	66,269	-	65,252	131,521	17098	114,423
Rochdale	148,690	203,311	-	352,001	21085	330,916
Salford	171,531	32,396	-	203,927	6414	197,513
Tameside	52,340	62,415	1,716	116,471	4659	111,812
Trafford	397,599	-	46,450	444,049	29220	414,829
Wigan	65,592	207,143	22,512	295,247	4563	290,685
Total	1,171,653	591,442	144,583	1,907,678	102169	1,805,509

Land Supply Position (Bringing Supply and Demand Together)

7.5 The total need figures for Greater Manchester (2021-2037) have been identified as:

- Offices: 1,900,000 sq m
- Industry and Warehousing: 3,300,000 sq m

7.6 The existing land supply for Greater Manchester (2021-2037) is:

- Offices: 3,129,263 sq m
- Industry/Warehousing: just over 1,805,509 sq m

Introducing 'Flexibility of Choice' into the Supply

Determining an employment land demand figure is not an exact science as unlike local housing need, there is no prescribed methodology, it is therefore subject to a degree of subjectivity. This topic paper summarises the approach taken in the plan area, which includes the application of a degree of 'flexibility of choice'. The key reasons for such an approach are summarised below:

- Enough land must be provided to allow companies and employers a 'margin of choice'. There must be flexibility and choice in the supply to allow occupier and developer needs to be fully met.
- Occupier requirements are likely to evolve over time, sometimes very considerably, and the site portfolio in our districts needs to be able to adapt and respond to this.
- To ensure the continuation of supply after the end of the plan period.
- To make sure the identified demand can be delivered as not all sites will come forward as anticipated.
- Post Brexit and Covid-19 there may be a need for an even more attractive and diverse supply of employment sites if it is to compete.
- Some existing employment areas may be utilised for employment generating uses other than industrial and warehousing floorspace, which, while making an important contribution to economic growth, may mean they are no longer available for industry and/or warehousing purposes.
- Anecdotal evidence suggests that a proportion of existing floorspace is poor quality. The supply 'flexibility of choice' will help raise the overall quality of employment land and allow occupiers of poor-quality premises to move to better quality premises.

Offices

7.8 The total office floorspace requirement for the plan period is approximately 1,900,000 sq m. As outlined in this topic paper, Greater Manchester's existing office land supply for 2021-2037, as at 31 March 2020, is 3,129,263 sq m. The vast majority of this land is in the key locations identified in Policy JP-J 3 'Office Development' and is on previously-developed land. This represents an oversupply of 1,229,263 sq m.

7.9 Although this supply is sufficient in numerical terms to meet the minimum office floorspace requirement up to 2037, it is considered that the very limited release of some existing Green Belt land within the Manchester Airport Enterprise Zone key location is required to maximise the competitive advantages of Greater Manchester. The land supply details of this allocation are summarised below:

PfE Office Allocation up to 2037

District	Allocation Name	Allocation Ref	Floorspace (sq m)
Manchester	Medipark	Policy JP Allocation 3.1	21,500

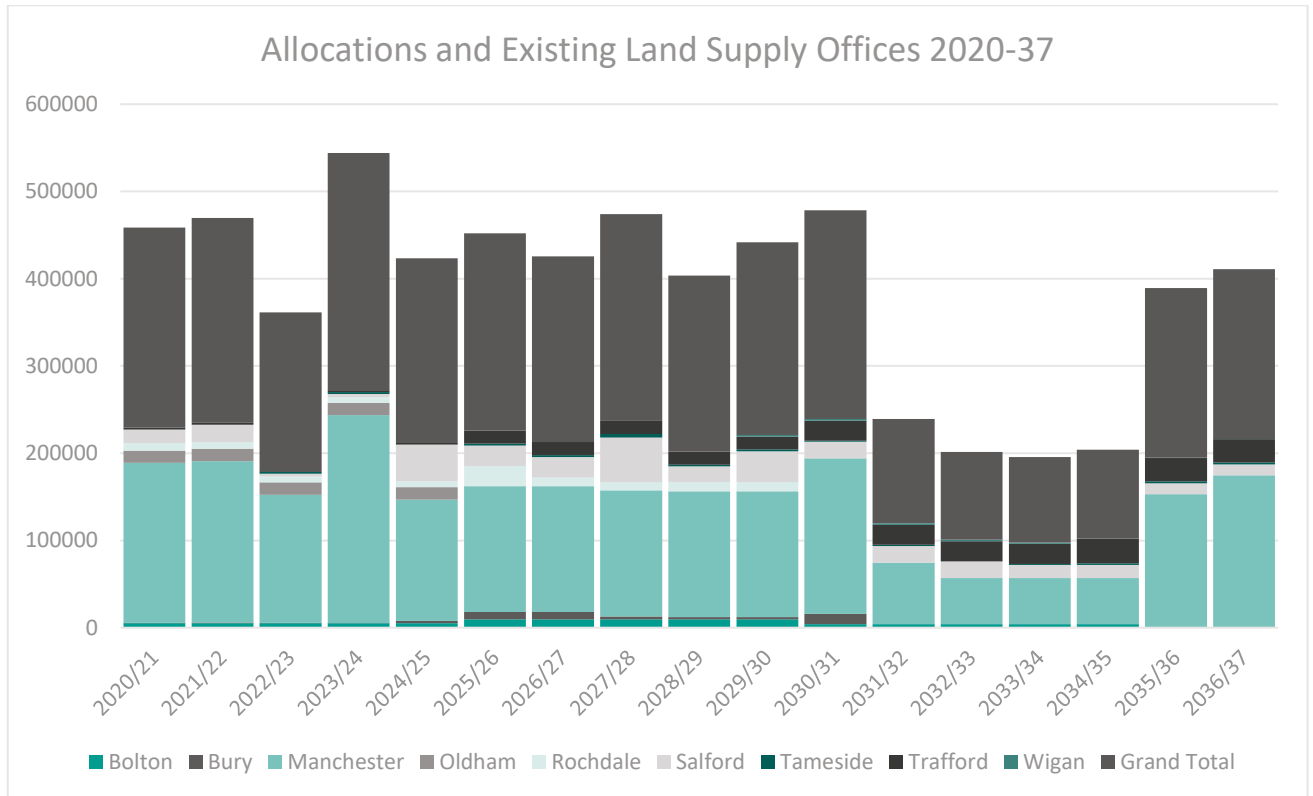
7.10 The impact of this on the supply position is illustrated below:

Combined existing and PfE office land supply 2021-2037

Office Supply Requirement 2020-2037	Supply Type 2021-2037	Supply Position 2021-2037
1,900,000 sq m	Existing land Supply: 3,129,263 sq m PfE Allocation 21,500 sqm	1,250,000 sq m surplus

7.11 Information on the exceptional circumstances for the release of the Green Belt can be found in Green Belt Topic Paper (July 2021).

7.12 The trajectory for total office land supply (existing plus PfE 2021 office allocations) is shown below:



Industry and Warehousing

7.13 The total industrial and warehousing floorspace requirement for the plan period is 3,300,000 sq m. As outlined in this topic paper, Greater Manchester’s existing Industry and warehousing land supply for 2021-2037, as at 1 April 2020, is 1,805,509 sq m. This represents a shortfall of 1,494,491 sq m.

7.14 To identify sites to meet this shortfall a site selection process was undertaken in line with the plan objectives and spatial strategy. Following this process allocations were derived that identified land for an additional 2,154,880 sq m of industrial and warehousing floorspace, as outlined below.

PfE Industry and Warehousing Allocations – 2021-2037

Update 28/09/2021: Additional row added to PfE Industry and Warehousing Allocations – 2021-2037 table as follows: District, Trafford; Allocation Name, New Carrington; Allocation Ref, Policy JP Allocation 33; Industry/Warehousing Floorspace (sq m) 2020-2037, 92,160.

District	Allocation Name	Allocation Ref	Industry/Warehousing Floorspace (sq m) 2020-2037
Bury / Rochdale	Northern Gateway	Policy JP Allocation 1	700,000
Bolton	Bewshill Farm	Policy JP Allocation 4	21,000
Bolton	Chequerbent North	Policy JP Allocation 5	25,000
Bolton	West of Wingates/M61 Junction 6	Policy JP Allocation 6	440,000
Manchester	Global Logistics	Policy JP Allocation 10	25,000
Oldham	Broadbent Moss	Policy JP Allocation 14	21,720
Oldham / Rochdale	Stakehill	Policy JP Allocation 2	150,000
Salford	Port Salford Extension	Policy JP Allocation 29	320,000
Tameside	Ashton Moss West	Policy JP Allocation 30	160,000
Trafford	New Carrington	Policy JP Allocation 33	92,160
Wigan	M6, Junction 25	Policy JP Allocation 34	140,000
Wigan	Pocket Nook	Policy GM Allocation 36	15,000
Wigan	West of Gibfield	Policy JP Allocation 37	45,000

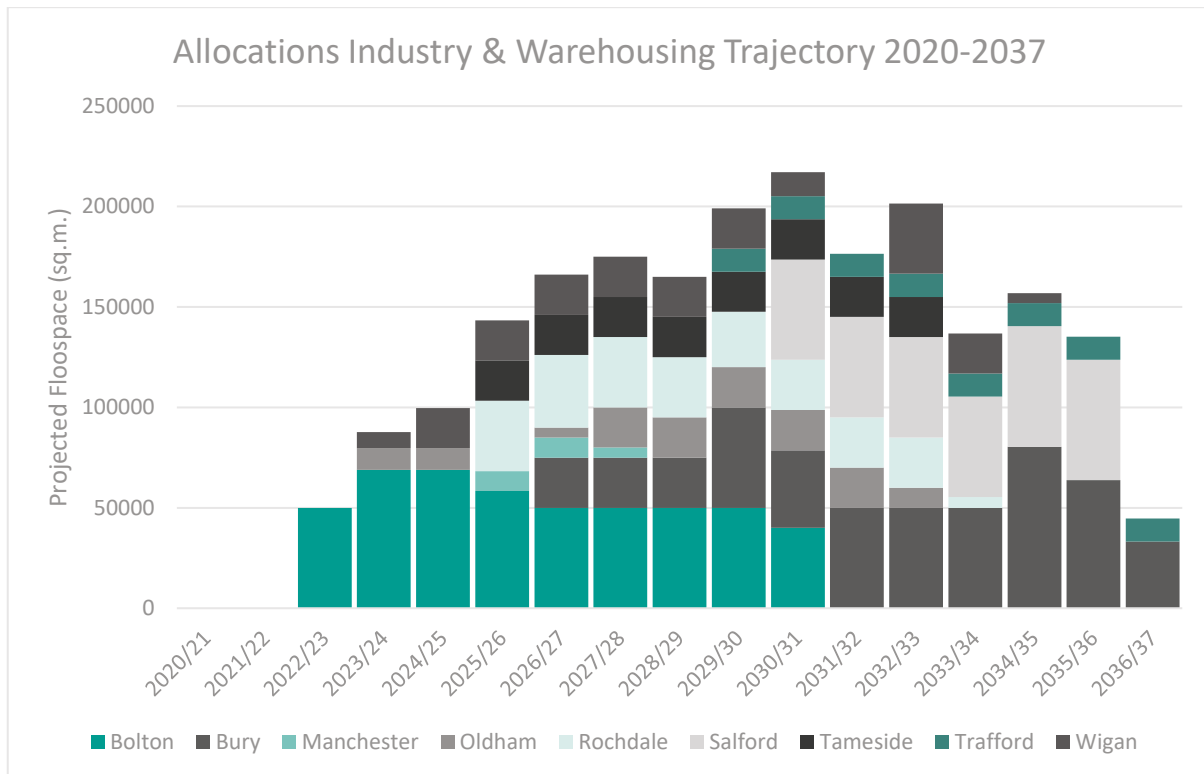
District	Allocation Name	Allocation Ref	Industry/Warehousing Floorspace (sq m) 2020-2037
PFE TOTAL			2,154,880

7.15 The impact of this on the supply position is illustrated below:

I&W Supply Requirement 2020-2037	Supply Type 2021-2037	Supply Position 2021-2037
3,300,000 sq m	Existing land Supply: 1,805,509 sq m PfE Allocations 2,154,880 sqm	660,389 sq m surplus

7.16 Information on the exceptional circumstances for the release of the Green Belt can be found in the Green Belt Topic Paper (July 2021).

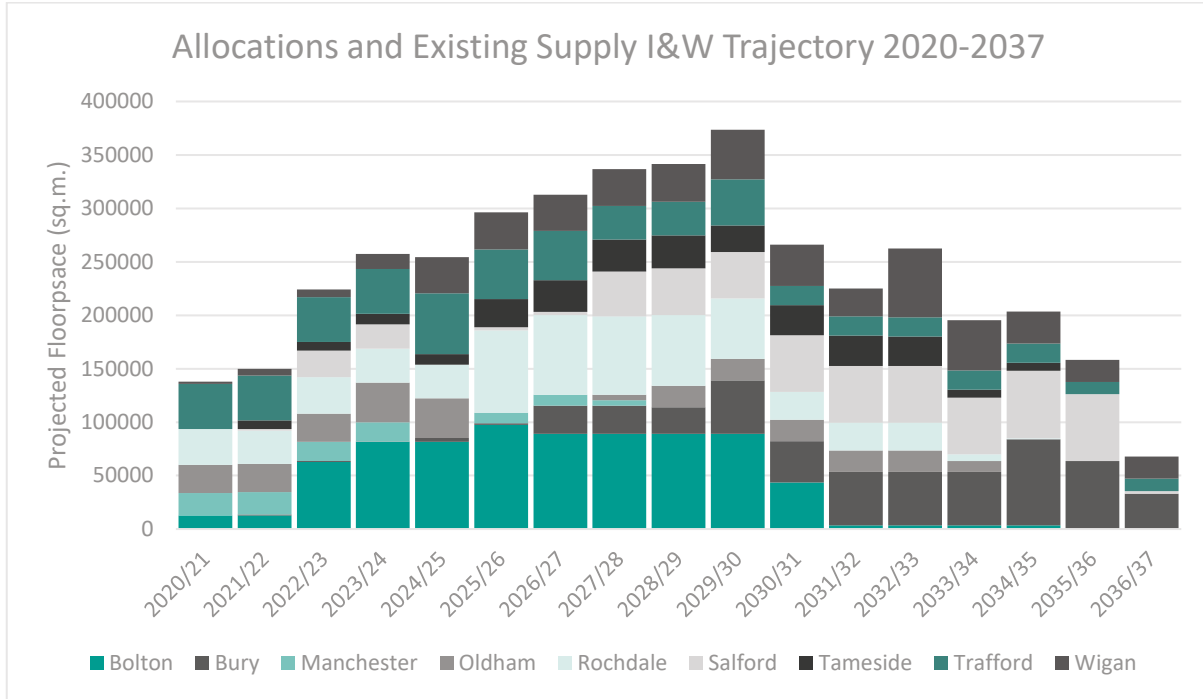
7.17 The trajectory for PfE 2021 industrial and warehousing allocations is displayed below:



7.18 Note:

- 1. The floorspace arising at Policy GM Allocation 1.1 'Heywood / Pilsworth (Northern Gateway)', has been split between Bury and Rochdale based on illustrative plans and may be subject to change following comprehensive masterplanning.

- 2. The floorspace arising at Policy GM Allocation 2 'Stakehill', has been split between Oldham and Rochdale based on illustrative plans and may be subject to change following comprehensive masterplanning.
- The trajectory for the total industrial and warehousing land supply (existing industrial and warehousing land supply plus 2021 PfE Industrial and Warehousing allocations) is shown below:



7.19 Note:

- The floorspace arising at Policy GM Allocation 1.1 'Heywood / Pilsworth (Northern Gateway)', has been split between Bury and Rochdale based on illustrative plans and may be subject to change following comprehensive masterplanning.
- The floorspace arising at Policy GM Allocation 2 'Stakehill', has been split between Oldham and Rochdale based on illustrative plans and may be subject to change following comprehensive masterplanning.

7.20 In addition, land for 477,793 sq m of industry and warehousing floorspace will be allocated to be delivered beyond the plan period i.e. after 2037. This is outlined in the table below:

Industrial and Warehousing land supply capacity beyond 2037

District	Allocation Name	Allocation Ref	Industry/Warehousing Floorspace (sq m)
Bury / Rochdale	Northern Gateway	Policy JP Allocation 1.1	365,000
Trafford	New Carrington	Policy JP Allocation 41	11,205
Wigan	Existing Supply	n/a	101,588
Total			477,793

Strategy, Policies and Allocations

8.1 This section of the Topic Paper follows the following structure:

- An analysis of the PfE 2021 Strategic Objectives relevant to employment and the economy
- Explaining the approach to supporting long term economic growth
- Explaining the Spatial Strategy for employment development in Greater Manchester: this includes making the most of key locations and assets, boosting northern competitiveness and sustaining southern competitiveness.
- The approach to addressing disparities
- An analysis of the Greater Manchester Land Supply Position: bringing supply and demand together
- The approach to maximising the use of previously developed land and, where necessary, the development of green belt for employment use
- The approach to maximising skills in Greater Manchester

Strategic Objectives

8.2 Objective 3 of the PfE 2021 is to 'ensure a thriving and productive economy in all parts of Greater Manchester'. It goes on to state that to do this we will:

- Ensure there is adequate development land to meet our employment needs;
- Prioritise the use of brownfield land;
- Ensure there is a diverse range of employment sites and premises;
- Facilitate the development of high value clusters in prime sectors such as:
- Advanced manufacturing;
- Business, financial and professional services;
- Creative and digital;

- Health innovation;
- Logistics.

8.3 Objective 4 of the PfE 2021 is to ‘maximise the potential arising from our national and international assets’. It goes on to state that to do this we will:

- Focus development in the Core Growth Area, Manchester Airport and key economic locations;
- Improve visitor facilities in the City Centre, Quays and Manchester Airport and our international and national sporting assets;
- Enhance our cultural, heritage and educational assets;
- Improve sustainable transport and active travel access to these locations;
- Improve access for local people to jobs in these locations;
- Ensure infrastructure provision supports growth in these locations;
- Increase graduates staying in Greater Manchester.

8.4 Objective 5 of the PfE 2021 is to ‘reduce inequalities and improve prosperity’. It goes on to state that to do this we will:

- Ensure people in all of our neighbourhoods have access to skills training and employment opportunities;
- Prioritise development in well-connected locations;
- Deliver an inclusive and accessible transport network;
- Strengthen the competitiveness of north Greater Manchester;
- Reduce the number of Greater Manchester's wards in the 10% most deprived nationally.

Supporting Long Term Economic Growth

Policy JP-J 1 ‘Supporting Long Term Economic Growth’

8.5 Economic growth is central to the overall strategy for Greater Manchester. It will be essential to raising incomes, improving health and quality of life, and

providing the finances to deliver better infrastructure, services and facilities.

- 8.6 Two of our key economic strengths are the size and diversity of our economy. This helps to provide a broad range of opportunities for businesses and varied jobs for residents. It also means that it is well-placed to take advantage of new economic possibilities, and should be more resilient to change. The transport network provides good connections to other major city regions, global markets and supply chains making it an attractive place to invest.
- 8.7 This plan supports high levels of economic growth across Greater Manchester and seeks to put in place the measures that will enable such growth to continue in the even longer-term.
- 8.8 However, delivering these high levels of growth will become increasingly challenging. Beyond the slowdown in productivity growth seen across the UK economy, and increasing international competition for trade and capital, Greater Manchester also faces the challenges of accommodating rapid technological change, and political risks and economic shocks such as Brexit and Covid-19. Greater Manchester will therefore need to continue to invest in the sites that will make it an even more attractive place for businesses to invest, bringing high-value, well paid jobs, to the city region, and supporting the continued progress towards a low-carbon economy.

Policy JP-J 2 'Employment Sites and Premises'

- 8.9 It will be important to ensure that there is an excellent supply of employment sites and premises across Greater Manchester, with sufficient variety in terms of quality, cost and location to maximise the ability to attract and retain jobs and investment. This will help to deliver high levels of economic growth and tackle inequalities by improving access to employment opportunities for existing and new residents.
- 8.10 If economic growth is to be sustainable in the long-term then it will be necessary for the supply of employment sites and premises to adapt to changing circumstances, technological advancements, and new working practices. The need to be able to compete for investment is constantly increasing and will become even more imperative after Brexit and Covid 19. A lot of businesses are currently doing fantastic things from poor premises, and there is the potential to improve productivity and support growth with modern buildings in better

locations. However, there will continue to be demand for cheaper accommodation from start-ups and businesses working on tight margins. A good combination of existing and new sites and premises will therefore be required.

- 8.11 Consequently Policy JP-J 2 states that a diverse range of employment sites and accessible premises, both new and second-hand, will be made available across Greater Manchester in terms of location, scale, type and cost. This will offer opportunities for all kinds and sizes of businesses, including start-ups, firms seeking to expand, and large-scale inward investment, which will help to tackle inequalities.

Policy JP-J 3 ‘Office Development’

- 8.12 Greater Manchester is generally acknowledged as having one of the strongest office markets in the country. The scale and quality of the offer is vital to supporting strong and productive sectors such as digital/creative, and business, financial and professional services. The offer within the City Centre is complemented by two other primary office markets and the town centres.

- 8.13 This policy states that at least 1,900,000 sq m of accessible new office floorspace will be provided in Greater Manchester over the period 2021-2037, with a focus on the City Centre, The Quays, Manchester Airport Enterprise Zone and its environs, and town centres.

Policy JP-J 4 ‘Industry and Warehousing Development’

- 8.14 Industrial and warehousing accommodation is essential to a wide range of businesses across many economic sectors. It is particularly important to the key sectors of advanced manufacturing and logistics, but is also crucial to supporting other parts of the economy and its continued provision will help to reduce inequalities.

- 8.15 There is evidence that past industrial and warehousing completions have been constrained by a lack of suitable sites within the plan area, resulting in the city-region being unable to compete for some major occupiers.

- 8.16 Therefore this policy states that at least 3,300,000 sq m of new industrial and warehousing floorspace will be provided in Greater Manchester in the period 2021-2037. The policy explains that a high level of choice and flexibility will be provided in the supply of sites, with a focus on offering a range of opportunities across Greater Manchester, making the most of key locations and significantly

increasing the supply of high quality sites across the northern parts of Greater Manchester.

Spatial Strategy for Employment Development

8.17 The central theme of the spatial strategy for Greater Manchester is to deliver inclusive growth across the city region, with everyone sharing in the benefits of rising prosperity. There are two main aspects to this:

- Making the most of the key locations and assets best-placed to support economic growth;
- Creating more favourable conditions for growth by providing high quality investment opportunities across Greater Manchester that help to address disparities.

8.18 The PfE 2021 Spatial Strategy is illustrated below and outlined in the following sections.

SPATIAL STRATEGY



Making the Most of Key Locations and Assets

8.19 If Greater Manchester is to flourish in the long run then it will need to make the most of its key assets and advantages, which can differentiate it from other places. The growth potential of a small number of locations that can boost international competitiveness will need to be maximised in order to support the prosperity of Greater Manchester as a whole.

8.20 Key Locations and assets include:

- The huge agglomeration of economic activity at the centre of Greater Manchester
- Manchester Airport
- Connections to the post-Panamax facilities at the Port of Liverpool
- The universities and knowledge economy

8.21 Key policies in the PfE 2021 plan are:

Policy GM-Strat 1 ‘Core Growth Area’

8.22 In summary, the economic role of the Core Growth Area will be protected and enhanced, with development supporting major growth in the number of jobs provided across the area.

Policy GM-Strat 2 ‘City Centre’:

8.23 In summary: the role of the City Centre as the most significant economic location in the country outside London will be strengthened considerably. The city centre will continue to provide the primary focus for business activity in Greater Manchester and will be a priority for investment. Over the plan period, 2021-2037, land to accommodate around 2,200,000 sq m of office floorspace has been identified within the City Centre.

8.24 Improvements in the public realm, walking and cycling facilities, and green infrastructure will help to enhance the environmental quality of the City Centre so that it can rival city centres across the globe, enabling it to compete effectively at the international level for investment, businesses, skilled workers, residents and tourists.

Policy GM-Strat 3 ‘The Quays’:

8.25 The Quays will continue to develop as an economic location of national significance, characterised by a wide mix of uses.

8.26 Over the plan period 2021-2037, land to accommodate around 192,000 sq m of office floorspace has been identified within the Quays with minimal industry and warehousing floorspace.

Policy GM-Strat 4 'Port Salford':

8.27 Port Salford will be developed as an integrated tri-modal facility, with on-site canal berths, rail spur and container terminal as essential elements of the scheme. The overall facility will provide around 500,000 sq m of employment floorspace.

Addressing Disparities

8.28 In broad terms:

- The central areas of Greater Manchester have a combination of a high concentration of key growth assets and large levels of past and forecast growth, but considerable deprivation.
- The southern areas have significant forecast growth, but with typically higher levels of prosperity and lower levels of deprivation. Manchester Airport is a key economic asset.
- The northern areas typically have lower recent and forecast growth, extensive areas of deprivation and, although there are some important infrastructure assets and significant levels of manufacturing activity, the growth opportunities are currently more limited than the rest of Greater Manchester.

8.29 If the forecast patterns of growth continue unchecked, reinforcing past trends, then Greater Manchester will become increasingly southward focused, with greater disparities between its northern and southern areas. This is not considered to be consistent with delivering inclusive growth, and would adversely impact on the long-term prospects for Greater Manchester. Hence, the PfE 2021 plan seeks to boost significantly the competitiveness of the northern parts of Greater Manchester, whilst ensuring that the southern areas continue to make a considerable contribution to growth and the most is made of key assets such as Manchester Airport.

Boosting Northern Competitiveness

8.30 Some significant interventions will be required to address the extensive deprivation and the relatively low levels of growth, economic activity and

prosperity across northern areas of Greater Manchester. Investment will be required across the northern areas, with the provision of a good supply of high quality development sites and major transport improvements across all districts to support greater competitiveness.

Policy JP-Strat 6 'Northern Areas'

8.31 This policy states that a significant increase in the competitiveness of the northern areas will be sought. There will be a strong focus on enhancing the role of the town centres, complemented by the selective release of Green Belt in key locations that can help to boost economic opportunities.

8.32 Investment in the town centres of the northern districts will be vital and it will be important to increase the attractiveness of the northern areas to a wider range of people. In particular, there is the potential to increase the number of higher income households who choose to live in the north.

8.33 Two locations have been identified as being especially important, having the potential to deliver significant benefits over a wider area and make a major contribution to raising the competitiveness of the northern areas as a whole: the North-East Growth Corridor; and the Wigan-Bolton Growth Corridor.

Policy JP-Strat 7 'North- East Growth Corridor'

8.34 The most significant proposed intervention in the northern areas is focused on the M62 corridor from junction 18 (the confluence with the M60 and M66) to junction 21 (Milnrow), extending across parts of Bury, Rochdale and Oldham. The scale of this initiative is considered necessary in order to transform perceptions of, and opportunities within, the north of Greater Manchester. It involves two major sites that require land to be removed from the Green Belt, as well as significant development on land outside the Green Belt such as the completion of the Kingsway Business Park.

8.35 This location has been selected for large-scale intervention for three main reasons:

- The M62 is a key piece of transport infrastructure connecting Greater Manchester with Liverpool and Leeds, and beyond, and this part of its corridor already has well-known established employment locations such

as Heywood, Pilsworth, Kingsway and Stakehill. As such, it has the scale, connectivity and profile required to attract a broad range of high quality occupiers and major inward investment.

- The corridor is close to a substantial residential population, many of whom live in deprived wards with poor connectivity to existing employment opportunities.
- It includes opportunities for large-scale development which together will have the critical mass to enable major investment in infrastructure and attract high quality businesses.

8.36 The M62 North-East Corridor will deliver a nationally significant area of economic activity and growth.

8.37 Over the plan period 2021-2037, land to accommodate around 1,000,000 sq m of new employment floorspace has been identified within the area.

8.38 The PfE 2021 allocates two major sites within the area, and proposes associated changes to the Green Belt boundaries, to support this growth: Allocation 1 'Northern Gateway' and, Allocation 2 'Stakehill'.

Policy JP Strat-8 Wigan-Bolton Growth Corridor

8.39 The Wigan-Bolton Growth Corridor will complement the North-East Growth Corridor to ensure that there are significant investment opportunities across the northern areas, helping to boost the competitiveness of all parts of the north. The Wigan-Bolton Growth Corridor proposals are smaller in scale than the North-East Growth Corridor, but are nevertheless important in supporting long-term economic prosperity.

8.40 There are numerous development sites already identified along this corridor, including some major previously developed sites. However, in order to maximise the contribution of this corridor to boosting the competitiveness of the northern areas, supporting the economic prospects of Wigan and Bolton and enable the construction of the new road and Rapid Bus Transit it is considered appropriate to release some land from the Green Belt.

8.41 The Wigan-Bolton Growth Corridor will deliver a regionally-significant area of economic and residential development.

- 8.42 Over the plan period 2021-2037, land to accommodate around 1,000,000 sq m of new employment floorspace has been identified within the area.
- 8.43 A large proportion of this new development will be on previously-developed land. In addition, the 2019 2020 Draft GMSF allocates the following sites within the area, and makes associated changes to the Green Belt:
- JP Allocation 5 'Chequerbent North',
 - JP Allocation 6 'West of Wingates/M61 Junction 6',
 - JP Allocation 34 'M6, Junction 25'
 - JP Allocation 37 'West of Gibfield'

Sustaining Southern Competitiveness

- 8.44 The overall spatial strategy for Greater Manchester seeks to spread prosperity to all parts of the city region. However, this must be balanced with the need to ensure that the competitiveness of the southern areas is sustained, and the potential of key assets such as Manchester Airport is realised.
- 8.45 A significant amount of investment in development will be focused around Manchester Airport; this will include the selective release of Green Belt for new employment. The other major proposal in the southern areas is the creation of a new settlement at Carrington in Trafford.

Policy JP-Strat 9 'Southern Areas'

- 8.46 The economic competitiveness of the southern areas will be protected and enhanced. There will be a strong emphasis on maximising the economic potential of, and benefits of investment in, Manchester Airport, which will be complemented by the selective release of Green Belt.

Policy JP-Strat 10 'Manchester Airport'

- 8.47 Manchester Airport provides a major opportunity to boost the competitiveness and prosperity of Greater Manchester, and the wider UK, and support higher levels of economic growth.

8.48 The benefits of the exceptional connections will be maximised including by:

- completing the development of Airport City immediately around the airport, providing a total of around 500,000 sq m of office, logistics, hotel and advanced manufacturing space
- continuing to develop Medipark and Roundthorn Industrial Estate as a health and biotech cluster
- delivering approximately 60,000 sq m of office floorspace around the new HS2 station

8.49 The Plan allocates three sites near the airport and makes associated changes to the Green Belt boundaries to support these developments:

- JP Allocation 3.1 Medipark
- JP Allocation 3.2 Timperley Wedge
- JP Allocation 10 Global Logistics

JP-Strat 11 'New Carrington

8.50 New Carrington provides the only opportunity in the plan area to deliver a new settlement of significant size. The inclusion of a large amount of employment development and local facilities, as well as a diverse range of housing, will enable New Carrington to function as a sustainable neighbourhood within Greater Manchester rather than an isolated community.

8.51 Over the plan period 2021-2037 land to accommodate around 350,000 sq m of employment floorspace has been identified.

Previously Developed Land Priority and Green Belt Development

8.52 A key role of the PfE 2021 plan is to manage the conflicting demands on the finite land resources of Greater Manchester. The need for new employment and associated infrastructure has to be accommodated, whilst at the same time protecting the environment, urban greenspaces, the countryside and the identity of different places. The 2019 GMSF consultation responses expressed a view that there was too much Green Belt development for employment use and not enough focus on previously developed land.

- 8.53 Strategic Objective 3 of the PfE 2021 plan prioritises the use of previously developed land in ‘ensuring a thriving and productive economy in all parts of Greater Manchester’ and Policy JP-S 1 ‘Sustainable Development’ states that ‘preference will be given to using previously-developed land to meet development needs’.
- 8.54 As explained in the Greater Manchester Employment Land Supply Statement in meeting employment need Greater Manchester districts have undertaken work to make the most of previously developed land. However, the baseline supply of sites for offices and industry/warehousing is insufficient to meet the total supply requirement. The approach to the release of Green Belt is explained in the Green Belt Topic Paper.

Skills

- 8.55 Economic growth and the success of cities are increasingly reliant on the creation and application of knowledge. It is the places with an excellent supply and broad range of skills that will be best-placed to attract investment and jobs, and which will be most able to cope with the long-term challenges of growing automation and globalisation.
- 8.56 The huge extent of university activity is one of the greatest strengths of Greater Manchester. With over 100,000 students attending its universities. Greater Manchester has one of the largest concentrations of students in Europe and an enormous supply of graduates who can help drive economic growth.
- 8.57 However, many residents find it difficult to access the opportunities available within Greater Manchester due to poor levels of educational attainment and skills development. Responses to the 2019 consultation included concern at the number of poorly paid, unskilled jobs, particularly in warehousing and concern that employment sites were primarily for low density, low value warehousing.
- 8.58 The Greater Manchester Strategy sets out ambitions to deliver good quality, high- skilled jobs. Ongoing work on the Local Industrial Strategy will develop this further. The PfE 2021 plan seeks to provide land to meet the widest range of employment opportunities to ensure Greater Manchester remains as competitive as possible and provides sites for advanced manufacturing, digital and tech jobs, for example, at Heywood/Pilsworth (Northern Gateway).

Policy JP-P 4 'Education, Skills and Knowledge'

8.59 This policy states that significant enhancements in education, skills and knowledge will be promoted throughout Greater Manchester, including by:

- Enabling the delivery of new and improved facilities for all ages, such as early years, schools, further and higher education, and adult training;
- Supporting the continued growth and success of the university sector.

8.60 Other parts of the PfE 2021 plan will also contribute to the development and application of the sub-region's knowledge base, including by:

- Increasing the supply of high quality housing in a more diverse range of locations to attract and retain greater numbers of skilled worker
- Improving transport links to locations across the North of England in order to maximise the ability to draw on skills from outside Greater Manchester
- Facilitating the delivery of high quality digital infrastructure across Greater Manchester, thereby enabling residents and businesses to access knowledge and skills.

Appendix 2 Places for Everyone

Employment Land Supply Statement

Executive Summary

- 1.1 This report sets out the employment land supply position for the nine constituent local authorities of the Places for Everyone Joint Development Plan as of 1 April 2020. It has been prepared jointly by the nine constituent Local Authorities and in accordance with national planning guidance.
- 1.2 The Employment Land Supply position as of 1 April 2020 is summarised in the tables below.

Table 1: Office Land Supply Summary

District	Number of sites	Total site area	2020 to 2025	2025 to 2030	2030 to 2035	2035 to 2037	Total 2020 to 2037	Post-2037
Bolton	10	86.80	25,875	48,624	19,444	0	93,943	0
Bury	8	7.92	3,994	24,292	11,920	0	40,206	0
Manchester	120	357.25	892,775	721,900	407,600	306,200	2,328,475	0
Oldham	33	96.42	70,826	0	0	0	70,826	0
Rochdale	14	19.48	35,968	63,743	0	0	99,711	0
Salford	24	39.18	84,882	151,178	87,551	25,000	348,611	0
Tameside	7	2.18	4,075	12,433	5,716	4,208	26,432	4,208
Trafford	34	206.64	10,206	74,614	120,074	53,534	258,428	45,000
Wigan	2	14.14	0	1,716	7,120	514	9,349	0
PFE	252	830.02	1,128,601	1,098,500	659,425	389,456	3,275,981	49,208

Table 2: Industry and warehousing land supply summary

District	Number of sites	Total site area	2020 to 2025	2025 to 2030	2030 to 2035	2035 to 2037	Total 2020 to 2037	Post-2037
Bolton	39	267.74	63,643	194,958	17,881	0	276,482	0
Bury	5	5.56	5,769	4,462	0	0	10,231	0
Manchester	32	30.48	77,749	0	0	0	77,749	0
Oldham	39	100.86	131,521	0	0	0	131,521	0
Rochdale	33	350.03	162,191	184,450	5,360	0	352,001	0
Salford	16	57.46	49,335	134,937	15,000	4,655	203,927	0
Tameside	18	32.67	35,841	41,891	38,739	0	116,471	0
Trafford	39	240.74	224,772	187,148	32,130	0	444,049	0
Wigan	29	127.95	35,097	84,440	134,418	41,293	295,247	101,588
PFE	250	1213.49	785,917	832,285	243,528	45,948	1,907,678	101,588

1.3 Some sites will feature in both the office land supply and the industry and warehousing land supply as they are suitable for a mix of both uses. Summing the site area and number of sites will result in double counting of these sites, but the floorspace capacities are not double counted.

Important Notice – Disclaimer

2.1 In relation to the information contained within this report (and any other report relating to the findings of the Places for Everyone Employment Land Supply Statement (ELSS)), please note the following disclaimer, without prejudice:

- The identification of potential employment sites, buildings or areas within the ELSS does not imply that the relevant Local Planning Authority (LPA) would necessarily grant planning permission for employment development. All planning applications incorporating employment development will continue to be treated against the appropriate development plan and material planning consideration.
- The inclusion of potential employment sites, buildings or areas within the study does not preclude them from being developed for other purposes.
- The boundaries that are attached to sites, buildings and areas are based on the information available at the time. The GM ELSS does not limit an extension or contraction of these boundaries for the purposes of a planning application.
- The exclusion of sites, buildings or areas from the study does not preclude the possibility of planning permission for employment development being granted on them or for these sites to be allocated. It is acknowledged that sites will continue to come forward (particularly small sites) that will be suitable for employment development that have not been specifically identified in the ELSS
- The categorisation of sites in terms of when they may come forward (short, medium or long term) is based on information held at the base date of the study (1 April 2020). Circumstances or assumptions may change which may mean that sites could come forward sooner or later than originally envisaged. The ELSS does not prevent planning applications being submitted on any sites identified or excluded within it at any time.
- The information that accompanies the ELSS is based on information that was available at the time of the study and there may be some omissions and/or factual inaccuracies which GMCA does not take liability for. Therefore, users of the ELSS findings will need to appreciate that there may be additional constraints on some sites that were not identified at the time of the survey and that planning applications will continue to be treated on their

own merits at the time of the planning application rather than on the information contained within this assessment. Likewise, some of the identified constraints may have been removed since the information was compiled. Issues may arise during the course of a detailed planning application that could not / were not foreseen at the time of the study. Applicants are therefore advised to carry out their own analysis of sites to identify any constraints or other information for the purposes of a planning application and not rely solely on the findings of the ELS.

- The capacity identified on the sites either relates to the floorspace granted within a planning permission (where applicable) or is an estimate based on an appropriate plot ratio for the site in question. In arriving at these plot ratios, Officers have taken into account locational and sustainability factors along with issues around local character and general views on the site. However, the capacities identified do not preclude floorspace being increased on sites, subject to details. Nor does it mean that the plot ratios envisaged within the assessment would be appropriate and these would need to be assessed through the normal planning process when submitting a planning application.
- The study has a base date of 1st April 2020 and the findings are only a 'snap-shot' of information held at that time. Therefore, some of the information held on the database will be subject to change over time. For example, sites that are identified as not having planning permission may have secured permission since the information was compiled, whilst planning permissions may have lapsed on other sites. The ELSS will be updated annually and/or at key stages of the preparation of the Places for Everyone Joint Development Plan as necessary.

Introduction and Methodology

Introduction

- 3.1 The National Planning Policy Framework (NPPF) sets out the national policy direction for the delivery of economic growth through the planning system. One key objective of the NPPF is to ensure that there is sufficient provision for employment development, looking over a minimum of 15 years from adoption. It seeks to make effective use of land by making as much use as possible of land that has been previously developed, including land and buildings that are vacant or derelict.
- 3.2 The National Planning Practice Guidance (PPG) states that an assessment of land availability should identify a future supply of land which is suitable, available and achievable for economic development uses over the plan period. This employment land supply statement has focused on an assessment of the potential supply of sites for:
- offices (B1a/b uses)
 - industry and warehousing (B1c/B2/B8 uses).
- 3.3 Assessments of the supply of land for economic development are expected to form a key component of the evidence base to support the delivery of employment development targets, which for the nine constituent local authorities will be set through the Places for Everyone Joint Development framework.
- 3.4 Each of the nine authorities has carried out their own assessment of employment land availability and prepared their own Employment Land Availability Assessments (ELAAs). This ELSS brings together information from each of the nine districts to identify the total employment land supply for the Joint Development Framework.
- 3.5 It is important to note that whilst this ELSS is an important evidence source to help inform the plan-making process, it will not in itself determine whether a site should be allocated for employment development or whether planning permission would be granted for employment development.

This summary report sets out how the Employment Land Supply Statement has been prepared and brings together the findings of the district assessments.

Background

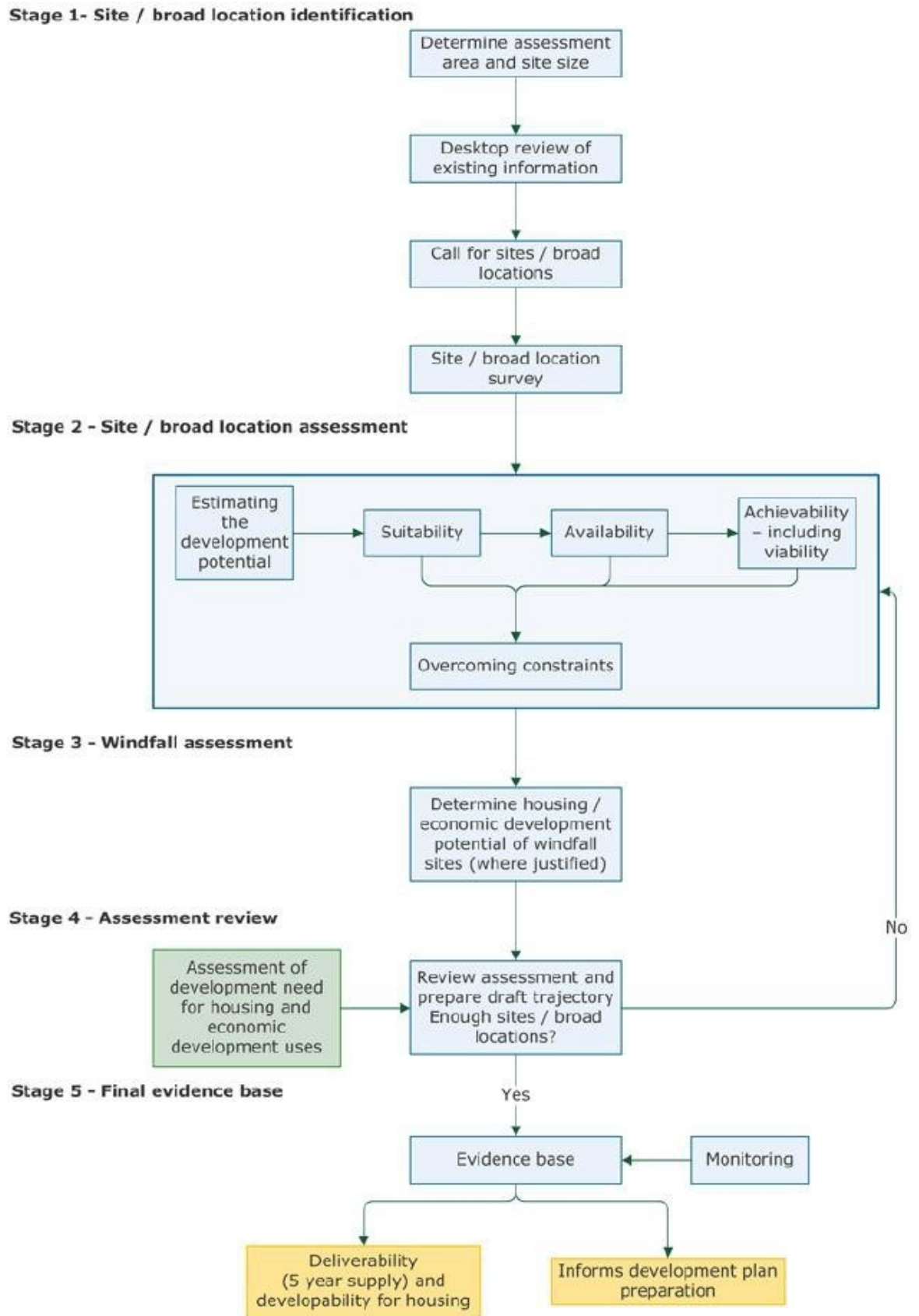
- 3.6 The ELSS forms part of the evidence base to assess the supply of employment land against the employment requirements for the nine local authority areas during the lifetime of the plan. Each district has carried out their own assessment of land available for economic development in accordance with the NPPG.
- 3.7 In line with the NPPG, economic land availability assessments should:
- Identify sites and broad locations with potential for development
 - Assess their development potential; and
 - Assess their suitability for development and the likelihood of development coming forward (the availability and achievability).
- 3.8 The results of the assessment can then be used to:
- Help an authority to identify how much employment development can be delivered within an area
 - Show whether or not employment development targets can be delivered over the plan period (or at least in the short to medium term);
 - Demonstrate a continuous, flexible and responsive supply of employment land can be provided; and
 - Provide an evidence base for the decision-making process

Methodology

Economic Land Availability Assessments

- 3.9 Each district has undertaken an assessment of land available for economic development which identifies sites that are considered to potentially be suitable and deliverable for economic development. This statement collates the information from each district to provide a summary of the Employment Land Supply for the nine districts, as at 1 April 2020. The national Planning Practice Guidance (PPG) sets out the methodology for the assessment of land availability as shown in Figure 1:

Figure 1: Land Availability Assessment methodology



3.10 Whilst all nine districts apply the above methodology, there are some differences in approach, as set out in relation to each of the stages below.

A note of caution should be applied to the ELSS data in that inclusion in an ELSS does not automatically imply that the site will be made available for economic development or guarantee that planning permission will be granted. The districts' Employment Land Availability Assessments are technical studies and not policy documents. They identify possible employment sites and assess the overall potential but ultimately decisions on which sites would be brought forward for development will be determined through either the local plan process or the planning application process. However, that said, it is considered that this ELSS represents a realistic position in relation to the current supply of sites across the nine local authority areas.

Stage 1: Site / broad location identification

3.11 Districts generally identify sites for inclusion from a combination of some or all of the following:

- Extant planning permissions
- Allocations
- Lapsed planning permissions
- Pre-application discussions
- Other known developer interest
- Officer knowledge
- Regeneration work and masterplanning
- Clearance sites and derelict land surveys
- Urban potential studies
- Council assets
- Aerial photographs
- Map analysis
- Call for sites
- Original ELAA produced by consultants
- Assessments by other parties.

3.12 In addition, as part of the Places for Everyone preparation process, in order to maximise the amount of brownfield development and minimise the need for Green Belt release each district has, as a minimum, undertaken a search for potential sites for each of the following:

- Extant planning permissions
- Allocations
- Lapsed planning permissions
- Developer proposals

- Main town centres
 - Sites in close proximity to public transport nodes, such as train stations and Metrolink stops
 - Safeguarded land
 - Protected open land
 - Other greenfield land around the edge of the urban area, informed by the latest open space assessment where available
 - Council-owned land
 - Sites previously discounted due to policy non-compliance but would nevertheless be preferable to Green Belt development.
- 3.13 The PPG advises that Economic Land Availability Assessments (ELAAs) should consider all sites and broad locations capable of delivering economic development of 0.25 hectares (or 500 square metres of floorspace) and above, and that alternative site size thresholds can be considered where appropriate.

Stage 2: Site / broad location assessment

- 3.14 For sites without planning permission, it is necessary to make assumptions about the development potential and capacity that the site could accommodate. This can be based on existing or emerging plan policy, or where plan policy is out of date or does not provide a sufficient basis to make a judgement then relevant existing development schemes can be used as the basis for assessment, adjusted for any individual site characteristics and physical constraints. The use of floor space densities for certain industries may also provide a useful guide. For sites with existing permissions, it is assumed that the site yield will not change, unless information from the developer suggests otherwise.

Stage 3: Windfall assessment

- 3.15 A windfall allowance may be justified in relation to housing but is not commonly used in relation to employment development.

Stage 4: Assessment review

- 3.16 The PPG states that once the sites have been assessed the development potential of all sites can be collected to produce an indicative trajectory. This should set out how much economic development land can be provided and

at what point in the future. An overall risk assessment should be made as to whether sites will come forward as anticipated.

- 3.17 Built out rates and lead in times have been determined by each district for their own sites, based on information available and past experience.

Stage 5: Final evidence base

- 3.18 Although the PPG no longer sets out standard outputs that should be produced from the land availability assessment, the following outputs were previously identified to ensure consistency, accessibility and transparency:
- a list of all sites or broad locations considered, cross-referenced to their locations on maps;
 - an assessment of each site or broad location, in terms of its suitability for development, availability and achievability including whether the site/broad location is viable to determine whether a site is realistically expected to be developed and when;
 - contain more detail for those sites which are considered to be realistic candidates for development, where others have been discounted for clearly evidenced and justified reasons
 - the potential type and quantity of development that could be delivered on each site/broad location, including a reasonable estimate of build out rates, setting out how any barriers to delivery could be overcome and when;
 - an indicative trajectory of anticipated development and consideration of associated risks.
- 3.19 The assessment should also be made publicly available in an accessible form. The baseline supply of sites is published on MappingGM (<https://mappinggm.org.uk>) with summary information presented in this report and full details prepared by each district.

Employment Land Supply

Offices

4.1 This section includes sites that have been assessed as suitable for the delivery of offices (use class B1a). This information provided is based on the position at 1 April 2020 and some of these sites may have been completed since then, secured permission for alternative uses or additional sites may have come forward. These changes will be picked up in any future updates of the ELSS.

Sites under construction

Table 3: Office sites under construction

District	Number of sites	Total site area	Office floorspace (sq m) 2020 to 2037
Bolton	2	0.11	795
Bury	0	0	0
Manchester	36	17.66	224,682
Oldham	1	47.66	6,689
Rochdale	2	5.81	86,285
Salford	5	8.20	104,005
Tameside	0	0	0
Trafford	10	6.30	7,249
Wigan	0	0	0
PFE	56	85.73	429,705

Sites with planning permission

Table 4: Office sites with planning permission, not commenced

District	Number of sites	Total site area	Office floorspace (sq m) 2020 to 2037
Bolton	5	82.37	55,856
Bury	5	4.269	6,048
Manchester	63	42.58	371,943
Oldham	17	20.69	26,617
Rochdale	10	11.33	4,026
Salford	15	10.47	117,384
Tameside	0	0	0
Trafford	17	32.717	82,957
Wigan	1	13.56	7,294
PFE	133	217.97	672,125

Other sites

Table 5: Other office sites

District	Number of sites	Total site area	Office floorspace (sq m) 2020 to 2037
Bolton	3	4.33	37,292
Bury	3	3.653	34,158
Manchester	21	297.02	1,731,850
Oldham	15	28.07	37,520
Rochdale	2	2.35	9,400

Salford	4	20.51	127,222
Tameside	7	2.181	26,432
Trafford	7	167.629	168,222
Wigan	1	0.59	2,055
PFE	63	526.33	2,174,151

Summary of office land supply

Table 6: Office land supply

District	Number of sites	Total site area	Office floorspace (sq m) 2020/21 to 2037	Post-2037
Bolton	10	86.80	93,943	0
Bury	8	7.922	40,206	0
Manchester	120	357.25	2,328,475	0
Oldham	33	96.42	70,826	0
Rochdale	14	19.48	99,711	0
Salford	24	39.18	348,611	0
Tameside	7	2.181	26,432	4,208
Trafford	34	206.641	258,428	45,000
Wigan	2	14.14	9,349	0
PFE	252	830.02	3,275,981	49,208

Industry and Warehousing

- 4.2 This section includes sites that have been assessed as suitable for the delivery of industry and warehousing (use class B1b/c, B2 and B8).
- 4.3 This information provided is based on the position at 1 April 2020 and some of these sites may have been completed since then, secured permission for

alternative uses or additional sites may have come forward. These changes will be picked up in any future updates of the ELSS.

Sites under construction

Table 7: Industry and Warehousing sites under construction

District	Number of sites	Total site area	I&W floorspace (sq m) 2020-2037	Post-2037
Bolton	5	111.89	88,806	0
Bury	0	0	0	0
Manchester	5	5.67	14,609	0
Oldham	7	52.64	65,224	0
Rochdale	2	175.81	58,211	0
Salford	0	0	0	0
Tameside	0	0	0	0
Trafford	8	57.28	87,856	0
Wigan	1	3.39	8,942	0
PFE	28	406.67	323,648	0

Sites with planning permission

Table 8: Industry and Warehousing sites with planning permission, not commenced

District	Number of sites	Total site area	I&W floorspace (sq m) 2020-2037	Post-2037
Bolton	17	96.42	38,585	0
Bury	2	3.982	6665.75	0
Manchester	27	24.81	63,140	0
Oldham	18	21.08	30,637	0
Rochdale	17	163.08	236,347	0
Salford	12	43.949	165896	0
Tameside	6	14.189	51841	0
Trafford	9	43.83	14,637	0

Wigan	12	39.26	84,560	7,175
PFE	120	450.61	692,308	7,175

Other sites

Table 9: Other Industry and Warehousing sites

District	Number of sites	Total site area	I&W floorspace (sq m) 2020-2037	Post-2037
Bolton	17	59.43	149,091	0
Bury	3	1.579	3,565	0
Manchester	0	0.00	0	0
Oldham	14	27.15	35,660	0
Rochdale	14	11.14	57,443	0
Salford	4	13.51	38,031	0
Tameside	12	18.48	64,630	0
Trafford	22	139.627	341,557	0
Wigan	16	85.30	201,746	94,413
PFE	102	356.22	891,722	94,413

Summary of industry and warehousing land supply

Table 10: Industry and warehousing land supply

District	Number of sites	Total site area	I&W floorspace (sq m) 2020-2037	Post-2037
Bolton	39	267.74	276,482	0
Bury	5	5.561	10,231	0
Manchester	32	30.48	77,749	0
Oldham	39	100.86	131,521	0
Rochdale	33	350.03	352,001	0
Salford	16	57.46	203,927	0
Tameside	18	32.669	116,471	0

Trafford	39	240.737	444,049	0
Wigan	29	127.95	295,247	101,588
PFE	250	1213.49	1,907,678	101,588

Risk assessment

4.4 As stated previously, inclusion in an ELAA does not automatically imply that the site will be made available for employment development or guarantee that planning permission will be granted. Through the ELAA process the districts have identified possible sites and assessed the overall potential but ultimately decisions on which sites would be brought forward for development will be determined through either the local plan process or the planning application process. There is also the potential for additional sites to come forward for economic development that have not specifically been included in the supply. However, that said, it is considered that this ELSS represents a realistic position in relation to the current supply of sites across the nine local authority areas.

Analysis of findings

Brownfield / Greenfield

5.1 As part of the preparation of their ELAAs the districts have undertaken work to identify any potential to increase yields and seek to make the most of brownfield sites.

Office land supply

Table 11: Office land supply by land type: Number of sites

District	Brownfield	Greenfield	Mixed
Bolton	8	1	1
Bury	6	2	
Manchester	117	3	

Oldham	31		2
Rochdale	13	1	
Salford	24		
Tameside	7		
Trafford	33	1	
Wigan		1	1
PFE	239	9	4

Table 12: Office land supply by land type: Site area (hectares)

District	Brownfield	Greenfield	Mixed
Bolton	12.90	0.99	72.92
Bury	1.04	6.88	
Manchester	323.49	33.76	
Oldham	42.40		54.01
Rochdale	17.07	2.41	
Salford	39.18		
Tameside	2.18		
Trafford	170.17	36.47	
Wigan		0.59	13.56
PFE	608.43	81.10	140.49

Table 13: Office land supply by land type: Capacity 2020-2037 (sq m)

District	Brownfield	Greenfield	Mixed
Bolton	79,984	3,447	10,512
Bury	11,721	28,485	
Manchester	2,225,961	102,514	
Oldham	59,272		11,554
Rochdale	18,462	81,249	
Salford	348,611		
Tameside	26,432		
Trafford	243,428	15,000	
Wigan		2,055	7,294
PFE	3,013,871	232,750	29,360

5.2 Overall, 95% of sites, 73% of site area and 92% of the baseline office floorspace is on brownfield sites.

Industry and warehousing land supply

5.3 Table 14, 15 and 16 identify the breakdown of the industry and warehousing land supply by brownfield, greenfield and mixed sites.

Table 14: Industry and warehousing land supply by land type: Number of sites

District	Brownfield	Greenfield	Mixed
Bolton	33	4	2
Bury	4	1	0
Manchester	29	3	0
Oldham	37	0	2
Rochdale	29	4	0
Salford	13	3	0
Tameside	11	6	1
Trafford	38	0	1
Wigan	17	10	2
PFE	211	31	8

Table 15: Industry and warehousing land supply by land type: Site area (hectares)

District	Brownfield	Greenfield	Mixed
Bolton	185.16	5.34	77.24
Bury	1.66	3.90	0.00
Manchester	19.87	10.61	0.00
Oldham	49.32	0.00	51.55
Rochdale	41.74	308.28	0.00
Salford	46.32	11.14	0.00
Tameside	15.18	17.00	0.49
Trafford	190.04	0.00	50.70
Wigan	47.34	73.08	7.53

PFE	596.61	429.36	187.51

Table 16: Industry and warehousing land supply by land type: Capacity 2020-2037 (sq m)

District	Brownfield	Greenfield	Mixed
Bolton	252,156	15,673	8,653
Bury	3,731	6,500	0
Manchester	13,745	64,004	0
Oldham	66,269	0	65,252
Rochdale	148,690	203,311	0
Salford	171,531	32,396	0
Tameside	52,340	62,415	1,716
Trafford	397,599	0	46,450
Wigan	65,592	207,143	22,512
PFE	1,171,653	591,442	144,583

5.4 Overall, 84% of sites, 49% of site area and 61% of the baseline industry and warehousing floorspace is on brownfield sites.

Employment land trajectory

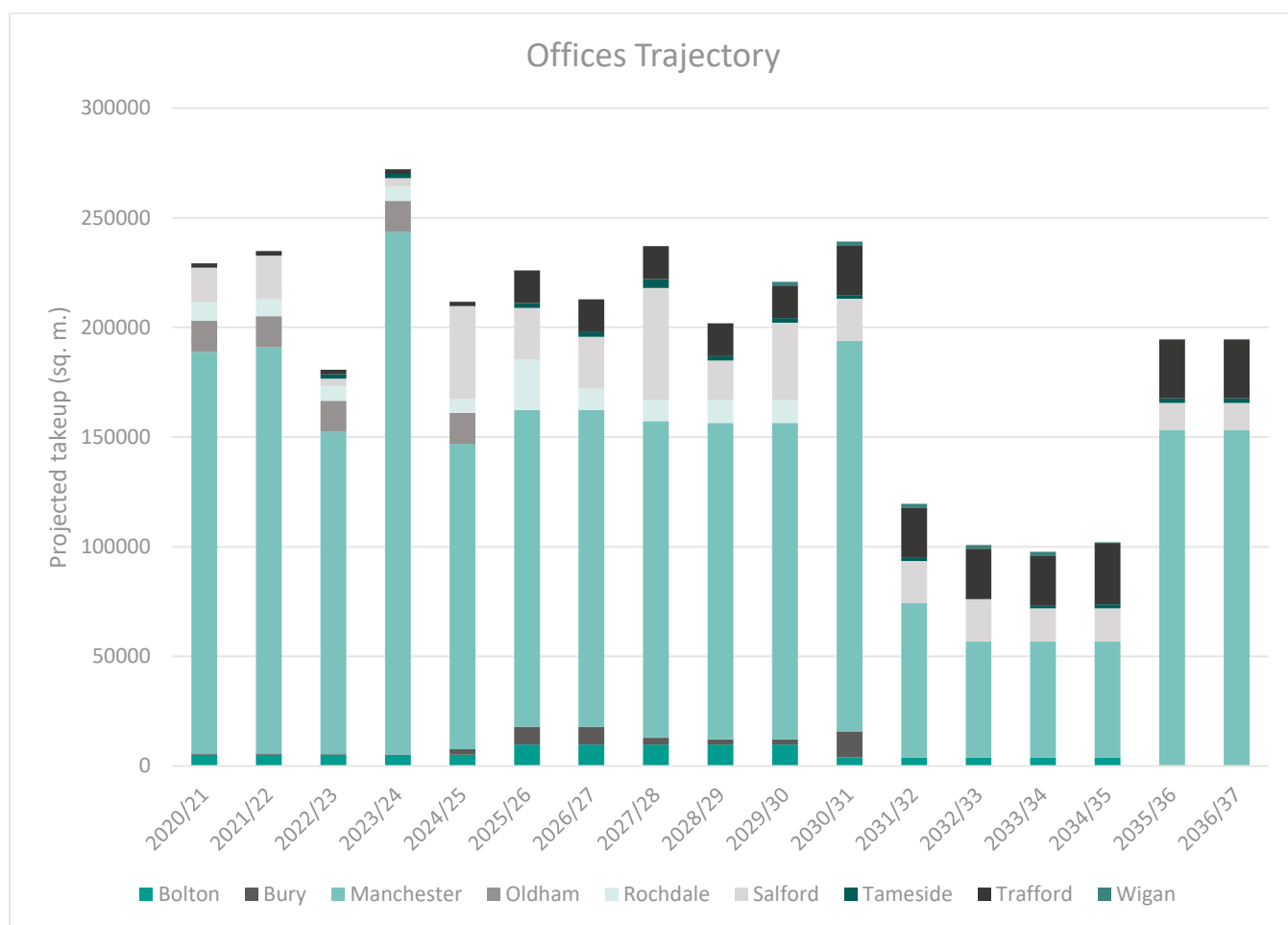
5.5 The PPG states that once the sites have been assessed the development potential of all sites can be collected to produce an indicative trajectory. This should set out how much economic development can be provided and at what point in the future. Figure 2 sets out this detail for offices and Figure 3 sets it out for industry and warehousing.

Office trajectory

Table 17: Office land Supply Summary

District	Number of sites	Total site area	2020 to 2025	2025 to 2030	2030 to 2035	2035 to 2037	Total 2020 to 2037	Post-2037
Bolton	10	86.80	25,875	48,624	19,444	0	93,943	0
Bury	8	7.92	3,994	24,292	11,920	0	40,206	0
Manchester	120	357.25	892,775	721,900	407,600	306,200	2,328,475	0
Oldham	33	96.42	70,826	0	0	0	70,826	0
Rochdale	14	19.48	35,968	63,743	0	0	99,711	0
Salford	24	39.18	84,882	151,178	87,551	25,000	348,611	0
Tameside	7	2.18	4,075	12,433	5,716	4,208	26,432	4,208
Trafford	34	206.64	10,206	74,614	120,074	53,534	258,428	45,000
Wigan	2	14.14	0	1,716	7,120	514	9,349	0
PFE	252	830.02	1,128,601	1,098,500	659,425	389,456	3,275,981	49,208

Figure 2: Offices Trajectory



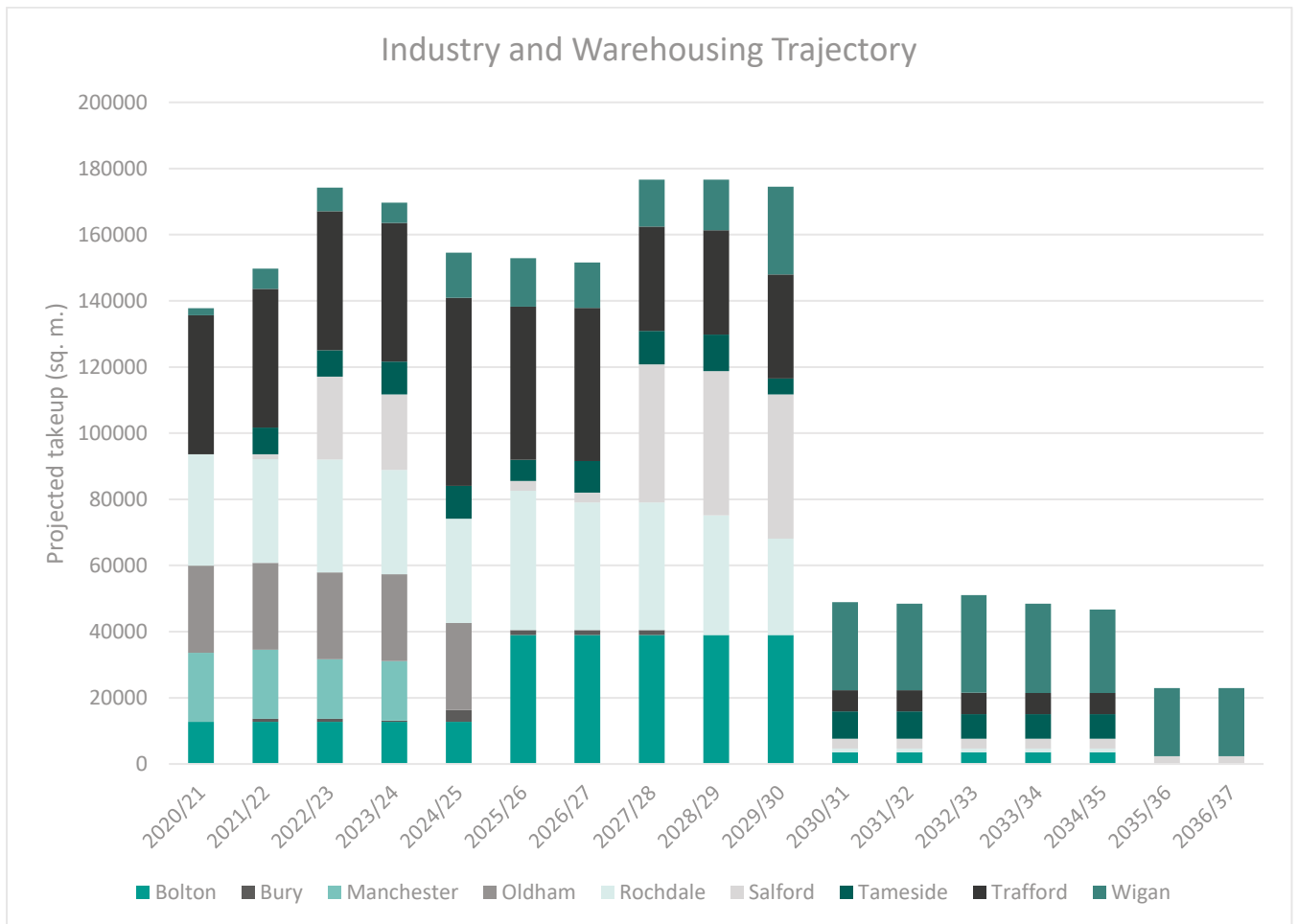
Industry and warehousing trajectory

Table 18: Industry and warehousing land supply summary

District	Number of sites	Total site area	2020 to 2025	2025 to 2030	2030 to 2035	2035 to 2037	Total 2020 to 2037	Post-2037
Bolton	39	267.74	63,643	194,958	17,881	0	276,482	0
Bury	5	5.56	5,769	4,462	0	0	10,231	0
Manchester	32	30.48	77,749	0	0	0	77,749	0
Oldham	39	100.86	131,521	0	0	0	131,521	0

Rochdale	33	350.03	162,191	184,450	5,360	0	352,001	0
Salford	16	57.46	49,335	134,937	15,000	4,655	203,927	0
Tameside	18	32.67	35,841	41,891	38,739	0	116,471	0
Trafford	39	240.74	224,772	187,148	32,130	0	444,049	0
Wigan	29	127.95	35,097	84,440	134,418	41,293	295,247	101,588
PFE	250	1213.49	785,917	832,285	243,528	45,948	1,907,678	101,588

Figure 3: Industry and Warehousing Trajectory



Conclusion

- 6.1 This summary document provides a snapshot of both the committed and potential employment land supply across the nine authorities covered by the Places for Everyone Joint Development Plan up to 2037 as of 1 April 2020. The results will be used to inform work on the development of the plan. In particular, it will play an important role in providing robust and credible evidence to support the proposed employment land targets.
- 6.2 Certain assumptions have been made within each of the ELAAs, and stakeholders are invited to submit further information to the relevant district in relation to existing ELAA sites or proposed additions to the ELAA's for consideration in future updates.

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