Trafford Council

Trafford Employment Land Study

Final Report

Issue

Lambert Smith Hampton

Property Solutions

Trafford Council

Trafford Employment Land Study

Final Report

May 2009

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Job number

ARUP

Job title	Trafford Employment Land Study	Job number
Document title	Final Report - Issue	File reference
Document ref		

Revision	Date	Filename	Problem Report.doc		
Working Draft 1	25/11/08	Description	First Working Draft		
			Prepared by	Checked by	Approved by
		Name	Steve Pimlott	Jane Healey Brown	Jane Healey Brown
		Signature			
Final Draft	February 2009	Filename	Final Draft		
		Description			
			Prepared by	Checked by	Approved by
		Name	Steve Pimlott	Steve Pimlott	Jane Healey Brown
		Signature			
Final Issue	April 2009	Filename	Final Issue		
		Description			
			Prepared by	Checked by	Approved by
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Final Issue	May	Filename	Final Issue		
		Description			
			Prepared by	Checked by	Approved by
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Issue Document Verification with Document ✓

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1 Introduction

1.1 Introduction

In September 2008 Arup and Lambert Smith Hampton (LSH) were commissioned to undertake an Employment Land Study (ELS) for Trafford Council in order to analyse the future demand and future provision of employment land in Trafford to 2025 in line with Trafford's emerging Core Strategy, and beyond to 2026.

This study will form part of the evidence base of Trafford Council's Local Development Framework (LDF). As part of the Planning and Compulsory Purchase Act 2004, each Local Planning Authority will be required to produce a suite of Local Development Documents, collectively called the LDF. In particular, the Trafford ELS will help provide evidence which can be used to inform employment issues in the LDF. Trafford Council is required to assess the future demand for employment land, and evaluate the quality of existing and potential employment land within the district in order to create an up to date and balanced portfolio of sites for employment uses to be held within the LDF.

With regards to this ELS it is important to note that all the site assessments for this study have been undertaken by Trafford Council. This work forms the basis of the study in terms of identifying which existing employment sites are still suitable for employment uses and should remain as part of Trafford Council's employment land portfolio and which sites could form the future supply of employment land. In considering the future supply for Trafford a key issue for this study is the recycling of previous and existing employment sites to form a significant proportion of the future employment land supply. The information provided by Trafford Council has then been used by Arup and Lambert Smith Hampton to identify if there will be sufficient land to meet future demand up to 2026.

1.2 Purpose of the Study

In planning for employment land, Local Authorities need to make provision for a supply of sites and premises of the right quantity, quality and location. The study has been prepared in accordance with Government guidance on preparing Employment Land Reviews and therefore the study provides a comprehensive review of the demand for employment land within Trafford using a range of qualitative and quantitative techniques. For more information on the requirements set out in the government guidance for undertaking Employment Land Reviews please refer to Section 3 of this report.

When defining employment land and uses, the scope of this report in identifying employment land demand and supply includes employment uses that fall within the B Use Classes system only. This can be categorised into B1, which are generally office type uses, B2 which is manufacturing and B8 which covers storage and distribution uses.

The report also includes the findings of an assessment of the quantity and quality of supply of employment land that has been undertaken by Trafford Council. This study has looked at the existing allocated employment sites in Trafford; non allocated employment sites identified by Trafford Council and sites identified through a 'Call for Sites' consultation exercise also undertaken by Trafford Council.

Together, the review of demand, and assessments of the quantity and quality of supply will be used to inform policy decisions regarding how much employment land to plan for in the Local Development Framework (LDF), as well as the right policies and actions to bring forward a suitable supply of sites and premises.

The study provides robust evidenced outputs and a series of recommendations that can be considered in taking forward the LDF and can form the basis of policy decisions on future employment allocations in Trafford.

1.3 Structure of the Report

This report is structured as follows:

- **Section 2** provides an introduction to Trafford, the Trafford Economic Context and a summary of the relevant national, regional and local policy documents.
- **Section 3** summarises the ODPM guidance for carrying out employment land reviews and outlines the quantitative models and methodology used to assess the demand for employment land in Trafford. Section 3 also includes a summary of the assessment criteria used to evaluate the existing and suggested employment sites.
- **Section 4** presents the detailed findings from the quantitative demand modelling work.
- **Section 5** presents the findings from our detailed discussions with developers, commercial agents, local businesses and other key stakeholders, and refines the findings from the quantitative modelling.
- **Section 6** provides an overview of the site assessments undertaken by Trafford Council.
- **Section 7** matches supply with demand and presents our recommendations on which sites Trafford should consider allocating for employment uses in the future.
- **Section 8** presents a set of key recommendations for Trafford in taking forward their employment land requirements in the future.

2 Contextual Overview

2.1 Trafford in Profile

This section provides an overview of the Trafford District and the sub region. The section begins by providing context on Greater Manchester as a sub region and its role in the North West region. The section then progresses to set out the role of Trafford in the context of the sub region and provides a brief summary of the demographics, socio economic conditions, deprivation and health, geographically characteristics, transport infrastructure and retail, leisure and tourism.

The Borough of Trafford is one of 10 local authorities that make up the conurbation of Greater Manchester. Greater Manchester is the economic engine of the North West and is the largest sub-regional economy outside London and the South East. After three decades of decline, Greater Manchester's population has begun to grow again, driven in particular by the sharp growth in the Regional Centre and the boom in city living. By 2002, Greater Manchester was home to 37% of all residents living in the North West.

Greater Manchester has been extremely successful in increasing employment opportunities and recently Trafford has performed even better with rates in excess of the national average. The conurbation's strong economic growth is forecast to continue over the next decade and as such Greater Manchester is expected to make an increasing contribution to regional and national economic performance.

Greater Manchester has very wealthy and successful areas, but also some of England's poorest neighbourhoods. It also has areas which are more rural than urban in nature which have different constraints to growth. Some parts of the conurbation suffer very poor levels of educational attainment, structural unemployment and high levels of economic inactivity in excess of national and regional averages. Therefore, Trafford must ensure, through the implementation of this Plan that the growth benefits all residents and contributes to the wider aspirations for Greater Manchester.

Trafford is located in the south west of the Greater Manchester conurbation. Trafford has a population of around 210,000 people, which is 8.5% of the Greater Manchester population and has a diverse mix of communities. Approximately two thirds of the population are of working age with the rest being fairly evenly split between children (20%) and people of retirement age (16%).

To the north and east, Trafford adjoins the Metropolitan Districts of Salford and Manchester and, to the south, the Districts of Macclesfield and Warrington, where the River Bollin forms the Borough boundary. Covering an area of some 10,600 hectares (26,200 acres or 41 square miles), it is one of the smaller District Councils within the conurbation.

The Borough boasts transport links as one of its major assets due to its accessibility by road, rail and water, into and out of the area but also around the Borough. Trafford is well linked to the UK motorway system and is only a fifteen minute drive away from Manchester Airport. Trafford is served by two local rail routes and the Metrolink runs through Trafford linking it to Manchester City Centre and Bury.

Trafford is a borough of contrasts and some of its neighbourhoods are amongst the most disadvantaged in the entire country. At its most stark, differences in life expectancy between areas within two neighbouring wards can be as great as 10 years. Partington and Sale West contain areas which are amongst the most disadvantaged 5%, in the country. Whereas recent evidence has shown Old Trafford to have climbed out of the bottom 5% the majority of areas in Old Trafford remain in the worst 10% in the country. Health and Disability, Income and Employment are of particular concern across these three neighbourhoods with all ranking in the 5% most deprived in these matters.

Trafford has four main town centres – Altrincham, Sale, Stretford and Urmston with Altrincham being the largest and main centre in the Borough. Each offers a range of convenience and comparison goods shopping opportunities and also have a significant role in the provision of commercial and community services and as leisure destinations. There is also a network of smaller district and local centres across the Borough which provide more day-to-day local shopping needs.

Since opening in September 1998, the Trafford Centre has become a household name providing regional shopping facilities and a leisure tourist destination, attracting 30 million visits annually. Sport also plays a significant part in the Trafford economy with the North of the Borough being home to Manchester United and Lancashire County Cricket Club, both of which attract visitors to the region, as well as being substantial employers[1].

2.2 Trafford Economic Context

2.2.1 Introduction

This section provides an overview of Trafford's economy and is based on information provided by Trafford Council. The information is based on the Trafford Economic Assessment, which is currently in draft form. For more information on the Trafford Economic Assessment please refer to Appendix A. In addition, further information on the Trafford economic and employment profile is set out in Section 5.

Trafford is an important centre for industry and business with major and long established industrial estates at Trafford Park and Carrington. Major companies located within Trafford Park and Trafford include Kellogg's, Procter and Gamble, United Utilities, Centrica, IBM and Manchester United. Trafford Park is one of the largest employment parks in the world. Most jobs are in the service sector, but manufacturing remains an important part of the economy

The main centres of employment and economic activity in the Borough, in addition to the town centres, are:

Trafford Park (including Wharfside) – Founded in 1896 - 639 hectares which contains a mix of older and new industries and some newer business sectors such as financial and professional. The core industrial area is home to many existing successful uses, such as Kelloggs, L'Oreal, Proctor and Gamble and Cerestar Cargill.

Carrington – 391 hectares based on now contracted petrochemical industry presence. Of the total area of employment land some is in use, some has extant planning permission and some is vacant.

Broadheath – Founded in 1885 - 57 hectares of currently varied employment types now contracted to an area defined to the north of the Bridgewater Canal and west of Altrincham Retail Park

2.2.2 Sectoral Analysis

Between 1998 and 2006, employee numbers in Trafford grew by 8.8% from 113,800 to 123,800. This compares favourably to trends throughout the country and region: it outstrips growth in Greater Manchester at 8.1%, the North West at 8.0% and average growth rates in England of 7.6% for the same period. This growth is supported by the strategic location of the borough, its good environment, excellent communications and the skills of its residents.

Naturally, growth varies by sector showing different patterns of demand and trends in employment. Certain sectors are particularly strong in Trafford, while others have shown decline.

Business, Financial and Professional Services have shown strong and continuing growth. There are 9,200 more employees in this sector in 2006 than there were in 1998, representing growth of 30.5% and a change in the employment share of over 5% from 26.5% to 31.8%. This sector has makes up a far greater proportion of Trafford's employment than in other areas: it is only around 20% of the workforce nationally, regionally

[1] Please note that retail, leisure and tourism uses and their contribution to employment are beyond the scope of this report as they do not fall into the B Use Classes as described in Section 1.2.

and sub-regionally. Particularly notable growth areas within the sector are computer activities, business services and financial auxiliary services.

The retail sector is particularly strong in Trafford, bolstered by the huge numbers of employees at the Trafford Centre. Growth of nearly 50% in this sector between 1998-2006 represents an additional 5,000 employees and means that retail employees, at 15,600, now make up 12.6% of Trafford's total. At a national, regional and sub-regional level, the retail sector accounts for around 10.5% of the workforce.

Other growth sectors include construction, with an increase of 1,000 employees over the same period meaning this sector now accounts for over 6% of the workforce; hotels and restaurants, showing an increase of just under 1,000 employees taking this sector to over 5% of the workforce; public administration, increasing by 1,100 employees to make up 4% of the workforce; and recreational, cultural and sporting activities increasing by 1,100 to nearly 3% of the workforce.

Meanwhile, the manufacturing sector has shown decline in the number of employees from 17,800 to 12,700, a decline of around 28% (1998-2006). This is very slightly slower decline than the national and regional average of around 29% and better than Greater Manchester's 32% decline over the same period. Manufacturing in Trafford now represents 10.3% of the workforce, down 5.4% since 1998. Notable employee losses are in the manufacturing of food and beverages, chemicals and machinery and equipment.

Apparent decline in the land transport sector seems to be a product of changed methodology rather than an actual loss, since the 1998 figure is abnormally high compared to all other years and the trend since 1999 is of slight year on year increase.

2.2.3 VAT Registrations

The number of VAT-registered firms in Trafford increased by 20% between 1997 and 2006, higher than the national average of 18% and much higher than the North West (15%) and Greater Manchester (13%). This reflects both high rates of firms registering for VAT and high survival rates of these firms. Nearly 13% of all new registrations in Greater Manchester in 2006 were in Trafford, and over 5% of those in the North West; 2006 showed record rates of VAT registration in the borough.

When compared to Trafford's population, Trafford's levels of VAT registration are particularly high in comparison to the national average as well as to the regional and sub-regional rates, suggesting high levels of entrepreneurship within Trafford's population and a positive perception of the success of starting a business in Trafford.

2.2.4 Business Size and Location

Trafford's economy is defined by the diversity of its businesses in terms of size, type and location and provides a solid foundation for adapting to short, medium and long term changes in the wider economic transformation such as the general shift from traditional employment sectors such as manufacturing to knowledge economy (Business, Financial and Professional Services)

Much of Trafford's land is predominantly residential. However, Trafford provides 11.8% of Greater Manchester's data units (similar to businesses, and the most accurate measure of business counts available to Trafford Council) and these are concentrated in certain areas with 38% of all the data units in Trafford are to be found in only 10 of Trafford's 138 Super Output Areas.

These 10 areas tend to be geographically small in comparison to the number of businesses located within them and account for half of the employee jobs in Trafford (over 61,000). This means there is a high concentration of businesses in Trafford suggesting that Trafford has a high number of small businesses/ enterprises. In addition, the economic assessment also identifies that a trend is beginning to emerge that suggests that these small businesses are continuing to get smaller and employ less people.

Another general pattern that emerges when analysing the size of businesses in Trafford is that there higher concentrations of small businesses in and round the district's town centres (Sale, Altrincham, etc.) compared to Trafford's business parks.

2.3 Planning Policy and Economic Context – An Introduction

This section of the report provides an overview of current policy guidance relevant to spatial planning for economic development. There are a wide range of policy guidance/statements that provide this overall context.

2.4 National Planning Policy Context

2.4.1 Planning Policy Statement 1 – Delivering Sustainable Development

This PPS was published in February 2005 and outlines the overarching planning policies for the delivery of sustainable development through the planning system. Paragraph 23 provides detailed guidance of what is expected of Planning Authorities in relation to achieving sustainable economic development. The 10 objectives that are highlighted within the PPS provide a positive context for economic development.

2.4.2 Planning Policy Guidance 4 - Industrial and Commercial Development and Small Firms

This document was first published in 1992 and sets out the broad guidelines for the location of industrial and commercial land uses in development plans, and the approach to development control with respect to economic development. Paragraph 6 of PPG4 states that, in allocating land for industry and commerce, planning authorities should "aim to ensure that there is sufficient land available which is readily capable of development and well served by infrastructure. They should also ensure that there is a variety of sites available to meet differing needs." Locational policies in development plans can reduce the need to travel while the re-use of urban land is encouraged.

2.4.3 Draft Planning Policy Statement 4: Planning for Sustainable Economic Development

It should be noted that as part of the Planning White Paper: Planning for a Sustainable Future (May 2007) Central Government intends to publish a new Planning Policy Statement, Planning for Sustainable Economic Development (PPS 4). This draft PPS has been out for consultation and further reinforces the Government's commitment set out in PPS1 to promote a strong, stable and productive economy with access for all to jobs, to regeneration and improved employment prospects.

The aim of PPS4 is to encourage local authorities to plan effectively and pro-actively for economic growth, job growth and investment whilst achieving a balance with environmental and social considerations. It encourages local planning authorities to make efficient and effective use of land by taking into account changing spatial working patterns and advances in information and communication technologies that would allow new ways of working such as live-work units and home-working.

The draft statement suggests that local planning authorities set criteria based policies, safeguarding, where necessary, land from other uses and identifying a broad range of sites able to facilitate a range of employment uses. In particular the draft statement promotes mixed use developments in appropriate locations.

It builds on the guidance on Employment Land Reviews (ELR) by specifying that planning authorities produce an Employment Land Study in order to understand both existing business needs and likely changes in the market sectors, to prepare spatial policies to support sustainable economic development and to encourage economic growth in their Local Development Frameworks (LDF).

The main implication of PPS4 is likely to be felt in the requirement for an enhanced evidence base relating to spatial economic policies. Key points of PPS4 include:

- Defining "Economic Development".
- Recommending that local planning authorities proactively encourage economic development in a sustainable way whilst being able to respond to economic change.
- Establishing the need to co-ordinate economic development with Infrastructure and housing provision.
- Requiring for local planning authorities to assess existing land supply for economic development.
- Ensuring employment polices address economic development in rural areas.
- Requiring that local planning authorities should facilitate a supply of land to provide for needs of different employment sectors.
- Local planning authorities should take into account changing spatial working patterns and changing technologies, and if not included in the Development Plan, such proposals should be assessed using the best available evidence.
- Setting out several recommendations for Development Control.

2.5 Regional Planning Policy Guidance

2.5.1 The North West of England Plan Regional Spatial Strategy to 2021 (RSS)

The Regional Spatial Strategy for the North West was adopted in September 2008 and provides a framework for development and investment in the region over the next fifteen to twenty years. It establishes a broad vision for the region and its sub-regions, priorities for growth and regeneration, and policies to achieve sustainable development across a wide range of topics – from jobs, housing and transport to climate change, waste and energy.

RSS is part of the statutory development plan for every local authority in the North West. Local Development Documents (LDDs), which are prepared by Local Planning Authorities, must be in general conformity with the RSS. Planning applications will be considered against the provisions of RSS and relevant Local Development Documents. However, RSS policies are not restricted to implementation through the grant or refusal of planning permission and a wide range of stakeholders in the public, private and voluntary sectors, many of them new to this process, will need to be engaged to deliver the strategy effectively.

The RSS sets out specific requirements for the supply of employment land across the North West for the period of 2005 – 2021 (Policy W3 Supply of Employment Land). The policy requires that local planning authorities should undertake a comprehensive review of commitments, to secure a portfolio of sites. In addition the policy sets out the employment land supply requirements for each sub region that makes up the North West. For Greater Manchester the RSS identifies that an additional allocation of between 536 hectares up to 917 hectares (including flexibility factor) will be required until 2021, however it does not disaggregate this land between the 10 districts that make up Greater Manchester and therefore the contribution from Trafford is yet to be determined.

As at April 2009, 4NW the Regional Leaders Forum have issued guidance on Employment Land Implementation to the region's local authorities. This sets out that for Greater Manchester, the 536 hectares should be the starting point for discussions between the Regional Planning Body and local authorities to establish the extent of land requirements at a sub regional level.

In addition to employment land supply, the RSS also addresses the release of allocated employment land (Policy W4). The policy requires that where sites are to be de-allocated in plans and strategies (following a comprehensive review of commitments outlined in Policy W3) consideration should be given to a range of alternative uses and determined as appropriate to the location and nature of each site. Alternative uses considered should include housing, and soft end uses, particularly where this will contribute to the delivery of Green Infrastructure networks.

2.6 Local Planning Policy Guidance

2.6.1 Introduction

This section is based on information provided by Trafford Council and summarises key implications from the adopted Trafford UDP, the emerging Local Development Framework and associated guidance, the Trafford Economic Development Strategy and the LSC's Learning and Skills Priorities for Trafford.

2.6.2 Unitary Development Plan

The Trafford UDP (to be superseded by the LDF) contains a full section and 13 policies relating specifically to the guiding principles for development in Trafford Park. It is recognised as a Priority Regeneration Area, and therefore an area for the development and redevelopment of land, the conversion and refurbishment of available buildings, landscaping and other environmental improvements and investment in local transport infrastructure. It is referred to as a 'large strategic employment area' of local, regional and national importance. Continued development and regeneration action in the Park is recognised as being critical to the future economic and community health and well-being of local residents.

Although work is being progressed on Trafford's Local Development Framework (LDF), the UDP remains the Council's adopted Development Plan.

The principal planning policy for employment land and premises in the UDP is policy E7. This policy covers a range of allocated employment centres in the Borough including:

Trafford Park (including Wharfside) – Founded in 1896 - 639 hectares which contains a mix of older and new industries and some newer business sectors such as financial and professional. The core industrial area is home to many existing successful uses, such as Kelloggs, L'Oreal, Proctor and Gamble and Cerestar Cargill.

Carrington – 391 hectares based on now contracted petrochemical industry presence. Of the total area of employment land some is in use, some has extant planning permission and some is vacant.

Broadheath – Founded in 1885 - 57 hectares of currently varied employment types now contracted to an area defined to the north of the Bridgewater Canal and west of Altrincham Retail Park
The employment centres under the UDP E7 policy across the Borough are:

- Hadfield Street, Old Trafford – 7.1 hectares
- Cornbrook Business Park, Old Trafford – 10.5 hectares
- Sale Business Park – 4.4 hectares
- Canal Road, Timperley – 4.66 hectares
- Britannia Road, Sale – 3.9 hectares
- Dane Road, Sale – 2.59 hectares
- Booth Road/Elm Grove, Sale – 3.25 hectares
- Longford Trading Estate, Stretford – 5.46 hectares
- Ayres Road/Elsinore Road, Old Trafford – 11.85 hectares

The total area defined by UDP policy E7 equates to 1140.71 hectares of which approximately 122 hectares are readily available for development[2]

[2] Please Note: The available employment land supply figure of 122ha is based on information provided from Trafford Council's Employment land Availability Schedule April 2008. Please note that the identified 122ha of available land

Office development areas under UDP E10 policy across the Borough are:

- Sale town centre and additional areas
- Altrincham town centre and additional areas
- Trafford Bar

2.6.3 Trafford Local Development Framework

2.6.3.1 Local Development Scheme

The Planning and Compulsory Purchase Act 2004 established the Local Development Framework – a new system for the preparation of spatial development plans for local authorities across the country. Trafford's Local Development Scheme sets out the programme of local development documents that will collectively deliver the Council's spatial planning strategy (the LDF). The most recent programme for Trafford's LDF identifies consultation on Core Strategy Options taking place July-September 2008, the Draft Plan Report to be submitted in March 2009 and a target date for adoption of July 2010. The Local Development Scheme (March 2007) proposes the Trafford LDF should contain the following:

- Core Strategy DPD;
- Partington Area Action Plan DPD;
- Land Use Allocations Plan DPD; and
- Greater Manchester Waste DPD.

In addition three Supplementary Planning Documents are proposed - Planning Guidelines for House Extensions SPD; Car and Other Vehicle Parking Standards SPD; and Affordable Housing Guidelines SPD.

The Trafford Local Development Scheme is currently under review so the timetable and list of DPDs/SPDs may be subject to change.

2.6.3.2 Core Strategy

The Trafford Core Strategy will be the first Development Plan Document to be produced as part of the Trafford LDF and will include detailed plans relating to economic, social and environmental issues in the borough. This section summarises progress to date in its preparation.

As part of this process an Issues and Options Paper was produced in July 2007 which set out core issues facing particular 'places' within Trafford and the potential options which exist to address them.

The comments received during early consultation on the Core Strategy Issues and Options Paper have informed the preparation of a Core Strategy Preferred Options Paper in July 2008.

The Preferred Options document sets out 3 spatial options for development. Under all 3 options, the core of Trafford Park would be prioritised for significant employment growth in both traditional and growth industries, although under option 2 this is also the case for Carrington. Whilst all three of the options would bring major new residential and employment opportunities to the borough, Option 3 would deliver the highest number of new jobs in Trafford Park as well as the highest density development at Wharfside with a spatial focus on the east of the Park. Option 2 would lead to a greater shift in residential terms towards a major Greenfield site on the western edge of the Park, whilst Option 1 delivers a more even distribution of housing development.

supply excludes 9.6ha of land that is currently under development for employment uses and 36,4ha of land at Site 42002/00 'Davenport Green'.

Finally, the paper sets out 11 key strategic sites in the borough, five of which are of relevance to Trafford Park – Pomona, Wharfside, Lancashire County Cricket Club, the Trafford Park Core and Trafford Centre Rectangle and a further three are also relevant to the supply of employment land – Carrington, Woodfield Road and Altair. Consultation on the Core Strategy Preferred Options Paper is being undertaken in July and August 2008. The intention is for an adopted Core Strategy to be in place by the end of 2010.

Trafford Strategic Housing Land Availability Assessment (SHLAA)

The Trafford SHLAA will be a key component of the LDF evidence base to support the delivery of sufficient housing land across the borough. The aim of the assessment is to identify a supply of sites with housing potential across the borough. Existing employment development sites were included from the initial assessment until the employment Land review is finished. A draft 2008 SHLAA has been published and consulted upon as part of the LDF Core Strategy preparation process. A revised and updated 2009 version of the report, taking into account the findings of this Employment Land Study (and a separately commissioned Site Viability Appraisal), is intended by the Council. The potential for mixed use development on existing employment sites and the potential impact of any major housing development proposals on nearby employment site supply are matters that will need to be assessed as this revision is progressed.

Trafford Sustainable Community Strategy

The Trafford Partnership brings together the key public sector agencies working within the borough. The work of the partnership is based around the delivery of the Trafford Community Strategy - Trafford 2021: A Blueprint. This document also provides the local vision and context in which the Trafford LDF is being produced. The vision for Trafford includes becoming the ‘enterprise capital of the North West’ and home to internationally renowned sporting and cultural attractions. The strategy is based around six strategic aims – safety and reassurance; diverse economy; strong communities; positive environmental impact; better homes; and health and improved quality of life for all.

The strategy includes 43 commitments. Of these, the most relevant to employment land are as follows:

- Improving access, the expansion of the Metrolink and improving the road network;
- Reducing inequalities and improving engagement and participation in working in Trafford;
- Supporting residents from disadvantaged communities to achieve a higher quality of life through employment, training and volunteering;
- Developing the right skills for the economy to address identified skills shortages particularly at NVQ Level 3 and encourage workforce development in growth sectors;
- Secure appropriate investment and environmentally friendly, well designed development in major employment centres, particularly Trafford Park;
- Secure and develop appropriate premises for new and expanding businesses;
- Developing Trafford as the enterprise centre of the North West;
- Ensuring a culture of corporate responsibility is in place across all sectors in Trafford;
- Support local businesses to benefit from a growing economy; and
- Grow business sectors by ensuring that there is the right infrastructure, economic conditions, business support and skills to drive up productivity, wealth and job creation.

The Community Strategy brings together key priorities for public sector agencies across a range of fields. Similarly, it will be important that proposals for employment land take into account not only economic factors, but issues relating to transport, skills, regeneration and the environment to ensure maximum impact for a range of communities.

2.7 Economic Policy Background

2.7.1 The Northern Way Growth Strategy (September 2004)

This document broke the North West, North East and Yorkshire and Humber into 8 city regions. The document brings together the three regions Economic Strategies and Regional Spatial Strategies to identify actions of an appropriate scale. The Northern Way is designed to address the prospect of continuing economic inequality amongst the regions. The Northern Way document investigates ways in which the economic disparity, which exists, between the North and the rest of the country (primarily the inequality between the north and the south east

2.7.2 Regional Economic Strategy (March 2006)

The North West as a region is committed to building sustainable economic growth, a high quality workforce and developing a region where everyone has the opportunity to fulfil their potential.

The Regional Economic Strategy (RES), written by the North West Development Agency is a 20-year rolling strategy with the aim of reducing the regions £13 billion economic production output gap (compared with the average for England). This strategy intends to create and maintain conditions that would enable continuous sustainable growth and private sector investment.

The RES aims to deal with three big growth issues that will help to reduce the output gap with the average for England, with the intention to:

- Improve productivity and grow the market (which accounts for £10 billion of the output gap);
- Increase the size and capability of the workforce (£3 billion of the output gap is due to fewer people working); and
- Create and maintain the conditions for sustainable growth.

2.7.3 Manchester Enterprises (October 2006): Assessment of Employment Land in Greater Manchester

The purpose of the study was as follows:

- Determine the spatial implications of employment forecast for Greater Manchester.
- Determine the locational requirements of market sectors
- Provide a geographical representation of sector demand across Greater Manchester.

The study was intended to inform further work on determining whether Greater Manchester has the right quality employment sites in the right location to accommodate projected employment growth. The study concluded that:

- The criteria sectors applied when determining location confirms that a wide range of factors are considered. This confirms the need for an extensive mix of property and sites across Greater Manchester to ensure market demand is met.
- An approach that focused solely on interventions to bring forward strategic investment sites to meet projected demand in Greater Manchester may not provide the necessary flexibility to meet market needs and realise the growth potential of the sub region.
- Consideration should be given to protection of sites that are not on the scale of strategic investments sites in terms of land take but are nonetheless viewed as critical to the growth needs of Greater Manchester. The identification of such sites of special

economic significance should be an integral part of the evaluation of the quality of the supply portfolio.

- Skills factors are especially important to the knowledge-based sectors such as financial and professional services, healthcare/biotech and environmental technologies and labour intensive sectors such as manufacturing/engineering and contact/shared service centres. Ensuring that the workforce of Greater Manchester has the correct balance of skills and knowledge is therefore as critical as providing the right property product.
- Demand for office floorspace is driven by the availability of property needs rather than the availability of developable land. Therefore securing the right range and quality speculative development is critical to maintaining a ready supply of office accommodation for the sub region.
- Assuming even the highest forecast demand for office accommodation, the development pipeline suggests that there is sufficient quantity of sites for 19 years for office accommodation. However, it will not be known whether those sites are the right quality and in the right location to meet sector demand until more is known about the supply of sites in the sub region.
- There is evidence that the demand for distribution space (B8) up to 2021 would to be more than met by development that is either underway, proposed or in the pipeline.
- Employment decline in the manufacturing sector suggests that up to 477 hectares of industrial land will no longer be needed. This would be a reduction of 28% by 2021. However, this does not mean that there will not be a requirement for new sites for this sector.
- Existing premises, which do not meet the requirements of modern manufacturing and engineering businesses will continue to be sought by residential and other developers and occupiers to seek to realise their maximum value. This will create significant churn within the market through relocations. The likely scale of relocations is not known and needs to be determined in order to make adequate provision for new sites.
- The extent to which the sub region has the right property/sites in the right location will ultimately be determined by the follow on work on employment site supply. This will also inform the interventions needed to better align supply with demand.

2.7.4 Greater Manchester City Region Development Programme and Action Plan

The City Region Development Programme and Action Plan was submitted to Government in 2005 and sets out how the Manchester City Region (MCR) can make the most significant contribution to closing the North’s productivity gap within the next ten to fifteen years.

The report indicates a vision for the city region stating that by 2025, the Manchester City Region will be:

- A world class City Region at the heart of a thriving North;
- One of Europe’s premier City Regions, at the forefront of the knowledge economy and with outstanding commercial, cultural and creative activities;
- World class, successfully competing internationally for investment, jobs and visitors;
- An area where all people have the opportunity to participate in, and benefit from, the investment and development of their city;
- An area known for, and distinguished by, the quality of life enjoyed by its residents; and
- An area with GVA levels to match.

The document states that it is clear that the Manchester City Region economy has the scale, reach, structure and recent performance needed both to make the most significant contribution to accelerating economic growth across the north of the country and to delivering national policy objectives. The City Region has demonstrated its ability to begin the transformation to a modern, knowledge-based economy. Consequently, the Development Programme states that it is now essential that the priorities outlined are delivered in order that the Manchester City Region delivers its full potential as the leading Northern economy, and makes a net contribution to closing the productivity gap from 2012.

Trafford Economic Development Plan

This document sits beneath the Community Strategy and provides a single framework to guide activities of the Trafford Economic Alliance, the economic arm of the Trafford Partnership which is the Local Strategic Partnership charged with developing and implementing the Trafford Community Strategy. The strategy offers analysis of the local economy and key drivers, articulates Trafford's economic assets, identify challenges, set out clear priorities and informs the Community Strategy Review.

The document emphasises that Trafford is a fundamentally important part of the City Region, without which the future growth potential of the City-Region will be severely constrained. Trafford benefits from having a high business density, high GVA per head and a good skills base. It is also a net importer of jobs, home to some key growth sectors and has a good quality of life. Trafford Park itself makes a key contribution to all of these issues, and is a key asset with a major role to play in the sub-regional economy. The document sets out the scope to extend the contribution of the Trafford Economy further.

The strategy recognises that Trafford Park is one of the largest concentrations of engineering, manufacturing and logistics related employment in Europe. It sets out strategic economic objectives for the borough as follows:

Addressing 'growing pains' and successfully managing some of its assets, namely:-

- Ensuring a suitable supply of workers in both lower and intermediate skills levels and to support knowledge based economies (more managers, professionals, associates and high level engineering positions);
- Overcoming congestion;
- Balancing the competing demands (houses, industrial, commercial, retail and open space); and
- Addressing the lack of suitable grow-on space.

Ensuring the wealth and opportunities are shared by all / tackling disadvantage – This involves the following

- Tackling areas of disadvantage around Sale, Partington, Carrington and Old Trafford;
- Tapping into the resources of these areas in terms of skills and enterprise; and
- Helping to tackle recruitment difficulties and skills shortages.

Raising profile and recognition – This involves the following:

- Increasing the scope for officers and members to make the case for Trafford with external strategic and delivery partners; and
- Exerting influence over policy and funding decisions.

Trafford Local Area Agreement

Local Area Agreements are new funding arrangements, introduced in 2004, between Central Government and Local Authorities. They are 3-year funding agreements with a focus on fewer priority outcomes and a move towards mainstreaming and consolidation of funding, in return for local authorities being given more freedom and flexibilities to focus on localised needs.

The second Trafford LAA for the period 2008-2011 was approved in July 2008 and confirmed agreed local improvement targets for the borough over this period. The LAA is the major delivery mechanism for the Community Strategy. The following are the key priorities from the 2008-2011 Trafford LAA:

- Safety and reassurance;
- Strong and diverse economy;
- Strong communities;
- Positive environmental impact;
- Better Homes; and
- Health and improved quality of life for all.

These priorities are underpinned by the following themes:

- Reducing inequalities;
- Improving access with a particular focus on transport issues;
- Better quality, co-ordination and sharing of information across all partnerships; and
- Promoting volunteering opportunities across all communities.

A number of these priorities and themes are of relevance to the Employment Land Study, in particular a strong and diverse economy, positive environmental impact, reducing inequalities and improving access / transport. Proposals within the Study should be considered by the local authority to align activities with the priorities of the LAA, in particular giving consideration to the potential contribution which could be made to delivering the following LAA's core indicators:

- NIS 117 - Number of 16-18 year olds who are not in employment, education or training;
- NIS153 - Working age people claiming out of work benefits in the worst performing neighbourhoods;
- NIS 154 - Net additional homes provided;
- NIS 167 - Congestion - average journey time per mile during the morning peak;
- NIS 172 - VAT registered businesses in the area showing growth;
- NIS 174 - Skills gaps in the current workforce reported by employers; and
- NIS 186 - Per capita CO2 emissions in the LA area.

The Employment Land Study should also be considered when developing the Multi-Area Agreement at an AGMA level, particularly given the level of cross-boundary co-operation and sub-regional importance associated with employment areas such as Trafford Park.

The Learning and Skills Council Baseline Report for Trafford

The LSC Greater Manchester's recent baseline report for Trafford analyses the current supply and demand for skills in the Trafford economy and highlights a number of key learning and skills issues for the borough which must be addressed in order to increase the economic competitiveness of Trafford and take advantage of potential growth sectors in the region. The key positive elements of the report are as follows:

- Trafford has a high proportion of higher skilled residents (Level 3 and above) and a lower proportion with no qualifications;
- The occupational profile of Trafford is weighted towards higher skilled occupations;

- Trafford has low unemployment and economic inactivity rates;
- There has been employment growth in Trafford, in particular within the ICT Digital / Communications Sector, Creative/Digital. New Media Sector and retail;
- Trafford has high levels of GVA growth and enterprise;
- Future economic growth forecasts are strong;
- Not currently engaged in Employment, Education or Training (NEET) figures in Trafford are lower than elsewhere in the sub-region; and
- High success rates in FE.

Whilst all of the above points are positives for the area, it means that the Borough fails to attract some external funding to tackle issues such as deprivation, skills and worklessness when compared with areas where these are more widely prevalent. There are also some specific skills issues to be addressed in the borough as follows:

- Trafford has relatively low levels of apprenticeships;
- The increase in FE success rates for 16-18 year olds is below the GM average;
- The high proportions of people with a learning difficulty / disability and with lower level qualifications;
- There has been a reduction in the participation of individuals aged 19 plus at level 2;
- There is a need to maintain the high level of achievement at NVQ Level 2 and 3; and
- Increasing the representation of Trafford Park residents in specific Train to Gain sector Subject Areas;

In relation to other areas in Greater Manchester, Trafford generally has a well qualified workforce. However it will be important to examine whether skills issues in priority regeneration areas in the borough are impacting upon the ability of residents to access jobs at existing employment areas.

2.8 Relevant Strategic Employment Land Studies

2.8.1 North West Regional Assembly (2005): North West Employment Land Study

This study was commissioned by the North West Regional Assembly and forms a key part of the evidence base of the Regional Spatial Strategy (RSS). The study aimed to provide an up-to-date, accurate and robust assessment of the quantity and quality of existing employment land in the North West, and the extent to which this land can meet projected future demand for the period to 2021.

Provision: In order to maintain consistency with the structure of the RSS, the report did not provide individual employment land requirements at District/Borough level, and Trafford was consequently included within the projections for the Greater Manchester sub-region. This sub-region was estimated to have around 1,330 hectares of B1, B2 and B8 employment land either allocated or committed. The study estimated that, at current rates of take up for the sub-region (112 hectares per annum); this would result in a forward land supply capable of accommodating development for the next 12 years. Consequently, the study concluded that additional land would be required to cover the full plan period (up to 2021), although it did not specify which Boroughs this should be located within.

3 Study Methodology

3.1 Introduction

This section outlines the methodologies used for the Employment Land Study. It was informed by the guidance outlined in the ODPM documents Employment Land Reviews (otherwise known as Employment Land Studies): Guidance Note (December 2004), in addition to best practice examples from similar employment land studies undertaken elsewhere.

The ODPM guidance recommends a consistent and integrated approach for employment land reviews at regional, district and town levels, to assist local planning authorities in the identification of suitable sites for employment development, to safeguard the best sites in the face of competition from other higher value uses and to help identify those sites which are no longer suitable for employment development, and made available for other uses.

The specific objectives of the guide are to help planning authorities to:

- Assess the future demand for employment land (at the regional down to the local level);
- Assess the future supply of sites for employment (at the local up to the regional level);
- Assess the suitability of individual sites, whether existing, permitted or proposed for future employment uses;
- Identify sites which are clearly unlikely to be required by the market or are now unsustainable for employment development;
- Develop appropriate future policies and proposals in RSS, but more particularly, in local development frameworks (LDFs), both in development plan documents (DPDs) and supplementary planning documents (SPDs); and
- Improve systems for monitoring outcomes and reviewing employment policies and programmes.

The guide summarises the overall approach to reviewing the need for and allocation of employment land, and the role of employment land reviews within the context of emerging RSSs and LDFs. It presents a three stage approach to employment land reviews including:

Stage 1) Taking Stock of the Existing Situation

The first stage provides advice on the initial steps in the review of existing employment land portfolios. The main objective of Stage 1 is a simple assessment of the 'fitness for purpose' of the existing employment land portfolio, principally in order to identify the 'best' employment sites to be retained and protected in addition to identifying sites that should clearly be released for other uses.

The vast majority of this stage 1 work was undertaken 'in-house' by Trafford Council.

Stage 2) Creating a Picture of Future Requirements

Stage 2 looks at assessing future requirements for employment land through the compilation of a range of complementary techniques to provide a full picture at the regional, sub-regional and local scales. The main objective of the Stage 2 analysis is to quantify the amount of employment land required within the study area during the plan period.

Stage 3) Identifying a 'New' Portfolio of Sites

Having established the best available picture of future requirements, a detailed review of the existing portfolio of employment sites can be undertaken in Stage 3, comparing the available stock with the particular requirements of the area. In identifying the new portfolio a range of sites were considered including selected sites allocated for employment use in the

Trafford UDP, sites identified through a 'Call for Sites' consultation exercise undertaken by Trafford Council in November / December 2007 and employment sites located on land that has not been allocated for employment uses in the Trafford UDP. In this way, it is possible to arrive at a full appraisal of the 'gaps' in local employment land provision and set parameters for the identification of new sites.

Stage 1 was undertaken by Trafford Council but is reported in this report. Stages 2 and 3 were completed by Arup and Lambert Smith Hampton and form the main sections of this report.

3.2 Sources of Information

For the assessment (Section 4 and 5), Arup and Lambert Smith Hampton have drawn on a number of different sources of information in carrying out this study including:

- Greater Manchester Forecasting Model data
- Monitoring data held by Trafford Council on historic employment land take up and employment losses (from the Trafford Annual Monitoring Report)
- Evolutive property database held by MIDAS.
- Background documents and reports such as the Trafford Economic Assessment

In addition, a number of pieces of information from Trafford Council haven been received that have included information on the past loss of employment land to other uses, planning application details and information regarding the needs and aspirations of businesses who wish to invest in Trafford. This information has been incorporated into the study and influenced the conclusions reached.

3.3 Quantitative Demand Projections Methodology

3.3.1 Historic Employment Land Take Up Rates

Records for average historic take-up rates of employment land were provided by Trafford Council for 2001-2007. These take-up rates were averaged to give an average annual take up for Trafford. The average annual take-up rate was then used to project forward the employment land requirements for Trafford up to 2026. This is based on the assumption that similar take up rates are likely to continue in the future. This figure represents the 'gross' figure for employment land required, because it does not allow for a loss of employment land to other uses for the study period.

3.3.2 Greater Manchester Forecasting Model

The quantitative demand assessment provided a series of scenarios derived from employee numbers projected within the Greater Manchester Forecasting Model developed by Oxford Economic Forecasts.

The Forecast for Greater Manchester was developed by Oxford Economic Forecasts and Regional Forecasts Limited as part of the Manchester and Salford Pathfinder project in 2004 / 2005. The model is constantly developed and updated annually to ensure timeliness and robustness. Employment land requirements have been derived from the employee tables within the Forecasting Model using two different scenarios.

The econometric modelling approach is recommended in the ODPM advice Employment Land Review: Guidance Note as providing the most robust basis for producing quantitative forecasts of employment land demand.

This model provides employee forecasts on a sector level up to 2026 under different scenarios. Each scenario is based on different assumptions about the potential overall performance of the Greater Manchester economy. Each year, the model is updated to make sure forecasts are in line with the most recent data and information. For this study three different scenarios have been considered, but a full analysis was only possible for two of those scenarios, namely the GMFM 2007 Update and the 2005 GMFM Accelerated Growth Scenario because the Lower Growth Scenario did not have a breakdown of employment forecasts for employment on B8 sites. The scenarios that have been considered are as follows:

- The GMFM 2007 Update (Baseline): acknowledges the future growth potential within Greater Manchester and recognises many extant economic and regeneration strategies that are relevant to the conurbation. This Update suggests that Greater Manchester can attain high levels of employment growth over coming years.
- The 2005 Greater Manchester Forecasts – March 2006 Scenario; Accelerated Growth Scenario (AGS): based on a separate model run in 2006. The forecasts are based on an earlier version of the forecast data, and looks at employment and population patterns that could happen if all pipeline proposals in 2006 were fully developed. This scenario also takes into account projected increases in B8 employment brought about by developments at Manchester Airport.
- The Lower Growth Scenario (LGS) 2008 – takes into account the impacts of the current global economic and financial crisis and considers a less optimistic view on the subsequent growth of the economy of Greater Manchester.

3.3.2.1 Translating Employment Forecasts into Employment Land

Employee projections for Trafford for the period 2007-2026 were translated into floorspace and then employment land requirements using a number of assumptions including:

- The relationship between types of employment and the different use classes.
- Employment densities – amount of floorspace needed to support one Full Time Equivalent (FTE) job.
- Plot ratios
- Vacancy rates
- The relationship between types of employment and the different use classes

For this study it is assumed that all business and professional services employment was based in offices, i.e. B1 premises; all manufacturing employment was assumed to take place in industrial buildings, i.e. B2; and all transport and communications employment was assumed to take place at warehousing sites, i.e. B8 premises.

Employment Densities

In order to determine the net employment land required to meet projected employment growth over the period 2007 to 2026, employee forecasts for each of those years, that is 2007 and 2026, were translated into floorspace using employment densities.

English Partnerships (EP) Guidance on employment densities gives the standard accepted densities for undertaking employment land reviews. These densities give an estimate of the amount of floorspace needed to house one employee according to use type and type of premises. According to that guidance offices require the least floorspace to generate one job followed by industry and then warehousing and distribution. Hence office developments produce the most jobs per sq m than Industry and warehousing and distribution. Based on EP Guidance the employment densities used in this study are as follows:

- Use Type Sq m per Employee
- Office 19 (gross internal floorspace)
- Industry 34 (gross internal floorspace)
- Warehousing and Distribution 50 (gross external floorspace)

Plot Ratios

These densities were multiplied by the number of employees estimated by the GMFM model scenarios to be employed in the office (B1), industry (B2) and warehousing and distribution (B8) sectors in 2007 and 2026 to give gross internal floorspace (external floorspace in the case of warehousing and distribution). These floorspace figures only include those areas usable/occupied by employees and do not capture all the area needed for a fully functioning employment site e.g. roads, parking, etc. Therefore it is assumed that the gross floorspace figures only represent 40% of the actual land needed to establish a functional employment site – that is a plot ratio of 40% is assumed[3]. Therefore the floorspace figures were divided by 40% to get total floorspace.

Vacancy Rates

These estimates of total floorspace give the floorspace actually occupied by employees, however at any one time there will be vacant floorspace. In 2003/2004 the vacancy rate in Trafford was 6.26%. It is entirely normal for there to be vacant property and in the Greater Manchester Employment Land study the ideal vacancy rate was taken to be 5%. Therefore the total floorspace figures for 2007 were inflated by 6.26% to give total existing gross floorspace, while the 2026 floorspace figures were inflated by 5% to give the ideal future total gross floorspace.

Net Employment Land Demand

To estimate the employment land required between 2007 and 2026. The total floorspace in 2007 (taking into account 40% plot ratios and a vacancy rate of 6.26%) was subtracted from total floorspace in 2026 (taking into account 40% plot ratios and an ideal vacancy rate of 5%). This was then converted to hectares by dividing by 10,000.

3.3.3 Loss of Employment Land to Other Uses

Analysis of the GMFM scenarios produces net employment land demand estimates, whereas the historic take-up rate analysis produces gross figures. In order to make the two estimates comparable employment land losses to other uses need to be incorporated into the net employment land estimates derived from the GMFM scenarios to produce gross figures. Alternatively, employment land loss figures can be taken into account in historic take-up rate estimates to give net figures comparable with GMFM estimates. By drawing on information provided by Trafford Council it has been possible to estimate the amount of existing employment land lost to other uses from 2001 - 2007. Consequently it has been possible to produce both gross and net land figures for each of the four different demand scenarios that have been analysed.

3.4 Qualitative Demand Assessment

It is important to recognise that it is not appropriate to rely on quantitative methods alone. There are limitations to the use and applicability of detailed projections of supply and demand partly due to unknown variables and a degree of questionable accuracy.

Consequently, a qualitative market assessment of the demand for employment land in Trafford as been undertaken through discussions with local businesses, developers and commercial agents.

This process has been led by commercial agents Lambert Smith Hampton and findings from the qualitative market assessment are included in Section 5.

3.5 Site Appraisal Methodology

This section has been written by Trafford Council and sets out a summary of the methodology used in Trafford Council undertaking site assessments to help identify the new portfolio of employment sites and the potential employment land supply in Trafford. An

[3] ODPM (2004) guidance given in *Commercial and Industrial Property Vacancy Statistics:*

analysis of the assessment is set out in Section 6 and full details of the site assessments are presented in Appendix B.

The project involved the assessment of a total of 49 sites including 42 existing allocated employment sites and 7 'Stand-Alone' sites. Of the 49 sites assessed, 15 sites were suggested by landowners and developers through the LDF Land Allocations Call for Sites process. The list of all 49 sites can be found in Appendix 4 with full details, scoring and site plans in Appendix 3. A commentary on the site appraisal forms Section 6 of the study.

The review of Trafford's current employment land was conducted during 2007 and 2008 with the existing employment land database being updated when new sites emerged. The base date for the study is April 2008. Sites which may have come forward or since then have not been included in the study. Likewise, some sites which may now be under construction remain in the report.

Sites were selected using the following criteria:

- a site threshold of 0.25 hectares suggested in the Employment Land Review Guidance Note.;
- exclude sites from the employment land database on which construction had started or was complete;
- exclude sites that are listed as a sub section of a larger site;
- include new sites identified through the development control process;
- include sites put forward through the Land Allocations DPD issues and options consultation and identified for employment or mixed use; and
- include sites identified as underused or surplus from officer site visits (i.e. areas within established employment areas that are clearly vacant or derelict but not on the employment land schedule).

Each site was assessed by Trafford Council using a combination of site visits and desktop assessments against a number of defined criteria within an assessment matrix under categories, and scored according to a scale based on the strength of its compliance with that criterion. The scoring criteria used have been categorised into three main areas: Sustainability, Planning policy and Market Attractiveness. A summary of each criteria is set out below for full details on the assessment criteria please see Appendix B.

SUSTAINABILITY CRITERIA

- Location type.
- Suitability for Employment Development - Surrounding Uses and Proximity to Residential Areas and Services.
- Accessibility by public transport.
- Pedestrian and Cycle Access
- Previously Developed land or Greenfield
- Flood Risk
- Environmental Impact

PLANNING POLICY CRITERIA

- Emerging Regional Spatial Strategy and Regional Economic Strategy
- Planning permission status
- Planning policy environmental constraints.
- Strategic Development Sites
- Site within an area for priority regeneration, improvement or protection.

MARKET ATTRACTIVENESS CRITERIA

- Availability
- Constraints
- Broadband Access
- Ownership constraints
- Commercial viability
- Road Frontage and Prominence
- Access to Trunk and Primary Road Network
- Proximity to rail freight, sea freight and air freight
- Quality of Surrounding Environment

The site assessment criteria are based on best practise examples from similar employment land studies undertaken at the regional and local level. Following the protocol suggested by Government guidance on employment land review aggregate scores are not used to determine the future of sites. Instead, each of the three categories is analysed individually in order to inform the decision on whether to maintain, include or release a site from employment use.

4 Quantitative Employment Land Demand Analysis

4.1 Introduction

Two main methods have been used to carry out the quantitative demand assessment. These are:

- Assessment based on historic employment land take up rates; and
- Assessment based on the Greater Manchester Forecasting Model (GMFM).

4.2 Projections based on Historic Take-Up Rates of Employment Land

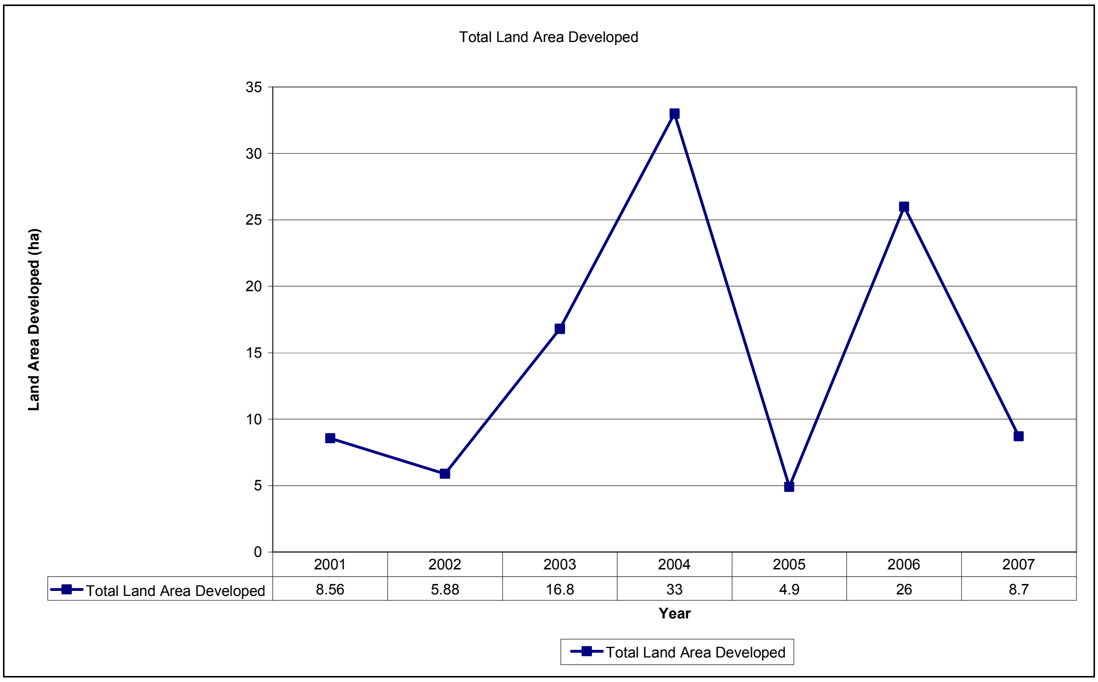
4.2.1 Introduction

This section discusses the projected demand for employment land based on historic take up of sites within Trafford between 2001 and 2007 (the longest time for which Trafford Council has available accurate data).

4.2.2 Historic Trends Analysis

Figure 1 below illustrates the trend in employment land take up in Trafford between 2001 and 2007. From the figure it is clear that take-up rates have varied significantly over the period, with the highest take-up of 33ha in 2004 followed by the lowest take up of 5ha in 2005. The average annual employment land take-up over this period was **14.8ha** per annum. This figure will be used to project future employment land demand up to 2026.

Figure 1: Employment land take-up in Trafford between 2001 and 2007



Detailed data was provided for 2001 to 2007 for each of the employment developments outlining the type of land and its previous use. Analysis of this data revealed that a significant proportion (88%) of employment development in Trafford over the past seven years took place on sites previously used for employment. This is illustrated in Table 1, which follows.

Table 1: More detailed analysis of Employment land take-up in Trafford between 2001 and 2007

Year	Land Area Developed		
	Sites Previously Used for Employment	Other	Total
2001	3.4	5.2	8.6
2002	5.9	Nil	5.9
2003	14.6	2.2	16.8
2004	29.2	3.8	32.9
2005	4.8	0.1	4.9
2006	25.7	0.2	26.0
2007	7.4	1.3	8.7
Total	**91.0**	**12.8**	**103.8**
Average	**13.0**	**1.8**	**14.8**

4.2.3 Projections

The average annual historic take-up rate of 14.8 ha was used to project forward employment land requirements up to 2026. Please note that unlike the RSS methodology a 'margin of choice' was not applied based on discussions and agreement with Trafford Council.

Table 2: Employment land – demand 2007-2026 based on average annual total land take-up

	Future Employment Land Demand 2007-2026
Current average annual take-up p.a.	14.8ha
2007-2026 total requirement	**281.2ha**

Table 2 above presents the results of projecting forward the average annual historic take-up rate of all land area developed over the past 7 years. According to these results over the period 2007-2026 Trafford may require **281ha** of employment land.

4.3 Greater Manchester Forecasting Model

4.3.1 Introduction

This method calculates employment land projections on the basis that there is a clear link between forecast employment levels and floorspace requirements. The modelling in this section is based on Oxford Economic Forecasting employee projections produced for the Greater Manchester Authorities. The employee projection forecasts for Trafford in this study are based on:

- The GMFM 2007 Update (Baseline)
- The 2005 Greater Manchester Forecasts – March 2006 Scenario; Accelerated Growth Scenario (AGS)
- The Lower Growth Scenario (LGS)

4.3.2 Employment Changes across scenarios

Table 6 below presents the projected employment growth forecasts across the three different GMFM scenarios. A sectoral breakdown is not available for the LGS.

It is clear that under the LGS employment growth is significantly lower than under the Baseline scenario (2007 Update) and the AGS. Under the LGS total employment is expected to grow modestly by 4% or 5,600 compared to the Baseline scenario under which employment is projected to grow by 13% or 16,100 employees. Under the AGS the growth in total employment is projected to be 18% or 22,600 employees.

All scenarios feature a large decline in manufacturing sector employment of around 40%. For the Baseline and AGS this decline is countered by strong growth in the business services sector. The greatest difference between the Baseline scenario and the AGS is the projected growth in the business services sector. Whereas this sector is projected to grow by 30% or 10,100 employees under the Baseline scenario, the increase under the AGS is expected to be 45% or 15,300 employees.

Table 3: Projected Employment Growth Forecasts across three GMFM scenarios

	LGS				Baseline				AGS			
	2007	2026	+/- 2007/ 2026	% change	2007	2026	+/- 2007/ 2026	% change	2007	2026	+/- 2007/ 2026	% change
Employees Total	126.4	132.0	5.6	4%	126.4	142.5	16.1	13%	126.4	149.0	22.6	18%
Manufacturing	12.8	7.2	-5.6	-44%	12.8	7.5	-5.2	-41%	12.8	7.7	-5.1	-40%
Construction					7.1	8.4	1.3	19%	7.1	8.6	1.5	22%
Distribution					25.1	26.4	1.3	5%	25.1	26.6	1.5	6%
Hotels and Restaurants					5.9	7.7	1.8	30%	5.9	7.9	1.9	33%
Transport and Communications	9.9	10.8	1.1	9%	9.9	11.1	1.2	12%	9.9	11.2	1.3	13%
Financial Services	38.7	43.0	4.3	11%	4.7	5.6	0.9	19%	4.7	5.7	1.0	21%
Business Services					33.9	44.0	10.1	30%	33.9	49.3	15.3	45%
Public Admin					4.8	5.1	0.3	6%	4.8	5.1	0.3	7%
Education					6.7	7.4	0.7	11%	6.7	7.4	0.8	11%
Health					9.0	11.1	2.1	24%	9.0	11.2	2.2	24%
Other Personal Services					6.3	8.0	1.7	27%	6.3	8.2	1.9	31%

Employment forecasts for specific sectors are used in estimating the different employment land requirements by land use type. Employment forecasts for business and financial services are used to estimate office-use (B1) employment land requirements; manufacturing employment forecasts are used to estimate industrial-use (B2) employment land requirements; and transport and communications warehousing (B8) employment land requirements. For the LGS employment forecasts were not provided for the transport and communications sector therefore these forecasts have been estimated. The 2007 employment levels for the LGS are assumed to be the same as the baseline and AGS. The employment forecasts for 2026 were estimated by assuming that the range of the percentage difference between AGS and baseline estimates of B1 and B8 employment will be the same value as the LGS but negative. For the AGS this range was 10%, that is a 11% difference between the AGS and the baseline for B1 and a 1% difference for B8. The percentage difference between the forecasts for LGS and the baseline for B1 was -13%. Therefore if the range is to be the same as the AGS the percentage difference between the LGS and the baseline would have to be -3%. Based on this the employment in transport and communication in 2026 is estimated to be 10,800 employees.

Table 7 summarises the changes in employment in the sectors where employment is assumed to be based at the different B use classes, namely financial and business services –B1; manufacturing B2; transport and communications – B8. Employment projections are the most different across the scenarios for B1 use types – that is for financial and business services.

Table 4: Summary of Changes in Employment by B Use Class Sector (FTE Employees)

Trafford	B1				B2				B8			
	2007	2026	Change	%	2007	2026	Change	%	2007	2026	Change	%
LGS	38,678	42,995	4,317	11%	12,756	7,167	-5,589	-44%	9,888	10,800	912	9%
Baseline	38,678	49,658	10,980	28%	12,756	7,549	-5,207	-41%	9,888	11,089	1,201	12%
AGS	38,678	55,001	16,323	42%	12,756	7,690	-5,066	-40%	9,888	11,218	1,330	13%

4.3.3 Floorspace changes by Use Classes across scenarios

Given the changes in employment by use classes summarised in Table 4 it is not surprising that a significant increase in B1 floorspace is projected alongside a significant need for de-allocation of B2. However loss of employment in manufacturing does not necessarily mean loss of employment land. Experience in many manufacturing sectors is that workers are replaced with capital investment in automation with car plants being an obvious example. To explore this issue further an analysis of GVA changes would be required.

As with the employment projections the floorspace projections are the most different across the scenarios for B1 use types – that is financial and business services.

Table 5: Floorspace Changes by Use Class (Sq m)

Trafford	B1				B2				B8			
	2007	2026	change	%	2007	2026	Change	%	2007	2026	Change	%
LGS	1,959,897	2,149,760	189,862	10%	1,156,652	641,269	-515,383	-45%	1,318,550	1,434,211	115,660	9%
Baseline	1,959,897	2,482,921	523,023	27%	1,156,652	675,398	-481,253	-42%	1,318,550	1,459,091	140,540	11%
AGS	1,959,897	2,750,072	790,175	40%	1,156,652	688,062	-468,590	-41%	1,318,550	1,476,066	157,516	12%

4.3.4 Employment Land Demand Projections 2007-2026

The floorspace figures set out in Table 5 were then converted to hectares. As set out in Table 6, based on these calculations under the LGS Trafford may need to consider releasing 21 hectares of employment land (not including B8 sites) between 2007 and 2026 for other uses. This includes 19 hectares of net employment land for B1 developments (such as office), 52 hectares of B2 manufacturing use to be released and an additional 12 hectares are estimated may be required for B8 uses (i.e. storage and distribution). Under the Baseline scenario (2007 GMFM Update) 18 hectares of net employment land may be required between 2007 and 2026, this is based on 52 hectares of additional land being required for B1(office) development, 14 hectares of additional land for B8 (storage and distribution) and the release of up to 48 hectares of land used for B2 (manufacturing) uses . However, under the AGS 48 hectares of net employment land may be required between 2007-2026 based on 79 hectares for B1 (office), 19 hectares for B8 (storage and distribution) and the release of up to 47 hectares of B2 (manufacturing uses).

Table 6: Employment Land Demand projections 2007 – 2026 (Ha)

Scenario	B1	B2	B8	total
LGS	19	-52	12	**-21**
Baseline	52	-48	14	**18**
AGS	79	-47	16	**48**

4.4 Loss of Employment Land to Other Uses

Historic take-up rates analysis results in a ***gross*** figure estimate of employment land requirements. However, the other GMFM estimates arrive at ***net*** figures, as they do not allow for losses of employment land. The figures from the historic take-up and the GMFM analysis are therefore not comparable. In order to make these comparable, employment land losses have to be estimated and applied to one of the estimates. For this study the loss of employment land is added to GMFM estimates to obtain gross figures which are comparable to the gross figures produced using the historic take-up projections. Loss of employment land occurs when a planning application for a non employment use (i.e. land uses that are not within the B Use Class Classification such as residential and retail) is approved on employment land that is either designated as an employment land allocation. Table 10 presents data obtained from Trafford Council on employment land losses between 2001 and 2007.

Table 7: Employment land Losses in Trafford 2001 - 2007

	Total Employment Land Loss to other uses (Ha)
2001	6.18
2002	3.47
2003	8.52
2004	2.10
2005	1.15
2006	6.66
2007	2.85
Average	**4.42**

If it is assumed that this rate of loss of employment land will continue over the years from 2007 to 2026 then up to 2026 Trafford is expected to lose **84ha** of employment land to other uses.

4.5 Summary – Demand to 2026

Overall four separate scenarios have been considered:

- One scenario that projects forward employment land requirements based on the Historic Employment Land Take-Up Rates for Trafford. These produce a ***gross*** amount of land that does not take into account loss of employment land to other uses.
- Three scenarios that produce ***net*** requirements based on the Greater Manchester Forecasting Model 2007 Update, Accelerated Growth Scenario (AGS) and Lower Growth Scenario (LGS).

This study uses these different methodologies to produce a range of land requirements to help in arriving at the most likely outcome. Each scenario has its limitations but together they help paint a picture of future requirements.

These four scenarios are summarised below:

Table 8: Summary of 4 Employment Land Demand Scenarios

Scenario	Land Requirement (ha)	Net or Gross?
1. Historic Take-up Projections	**281**	Gross
2. GMFM 2005 AGS	**48**	Net
3. GMFM 2007 Update	**18**	Net
4. GMFM 2007 LGS	**- 21***	Net
		* estimated figure

The four scenarios show land requirements ranging from a *net decrease* of 21 hectares based on the GMFM 2007 Lower Growth Scenario to a large gross requirement of 298 hectares based on the historic take up rates over the last 7 years.

4.5.1 Incorporating Loss of Employment Land to Other Uses

By taking into account losses of employment land to other uses, the *gross* figures for each of the 4 scenarios can be derived – that is a loss of 81 hectares of employment land to other uses over the period to 2026. The employment land requirements taking into account employment land losses are given in Table 9.

Table 9: Estimated Gross Employment Land Demand in Trafford 2007 to 2026

Scenario	Land Requirement (ha)	
	Net	Gross
1. Historic Take-up Projections	n/a	**281**
2. GMFM 2005 AGS	**48**	**132****
3. GMFM 2007 Update	**18**	**102****
4. GMFM 2007 LGS	**- 21***	**63****

* estimated figure

**derived figures, using loss of employment land to non employment uses

The above table shows an estimated gross employment land demand over the period 2007 to 2026 of between 63ha and 281ha, with the 3 econometric model derived scenarios (preferred in the ODPM guidance) producing gross land requirements of between 63ha and 122ha. These figures assume losses of employment land continue at the rate of around 4.42ha per annum. Should losses of employment land to other uses decline, then the gross figures shown for scenarios 2-4 would decline, however, were losses of employment land to accelerate, then this could mean a larger gross figure is required.

4.6 Conclusions

This section concludes the quantitative demand chapter but does not represent an overall conclusion to the level of demand for employment land in Trafford. Discussions with a range of key stakeholders have been used to refine the figures captured by the quantitative modelling and this set of conclusions should be read in conjunction with the discussions and conclusions set out in section 5.

The historic take-up analysis suggests that Trafford may have demand for employment land over the period 2007-2026 of about **281ha**. In estimating demand, the ODPM Guidance recommends the use of both historic take up rates and econometric models in deriving a preferred estimate of demand. The econometric model derived scenarios produce gross land requirements of between **63 – 132ha** over the period 2007-2026.

Overall the two methods of estimating future employment land demand suggest a range of between **63ha** and **281 ha**. In accordance with government guidance, this range will be further refined (see Section 5), taking into account the outputs from stakeholder consultations.

5 Qualitative Demand Assessment

5.1 Introduction

This section seeks to provide an overview of the current Trafford office and industrial property markets. It will identify current demand and supply, with an analysis of the how the market currently perceives the borough.

5.2 Consultees

The qualitative demand assessment has been written using evidence supplied by Trafford Council, MIDAS (the Greater Manchester Inward Investment Agency), LSH's own databases and consultations with developers and agents.

In addition, this section also sets out the findings of a stakeholder workshop undertaken on the 8 October 2008. The workshop involved presenting the findings of the quantitative employment land demand modelling undertaken (see Section 4) and facilitating discussions with stakeholders to establish their views on the initial employment land demand range as well as employment issues in Trafford in general.

5.3 Demand

In order to effectively assess demand within the Trafford district, information held by MIDAS on their Evolutive property database has been obtained and used. Figure 2 shows the breakdown of enquiries for property, broken down into floor area, for both office and industrial properties.

Figure 2: Office Enquiries in Trafford 2004 – 2008

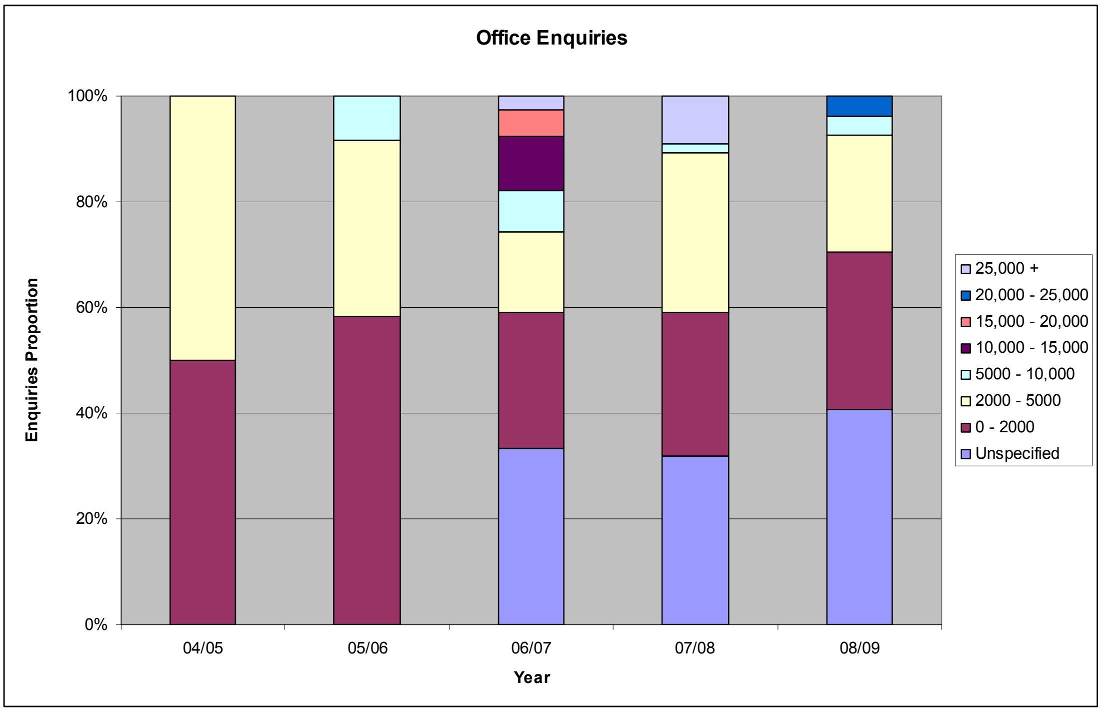
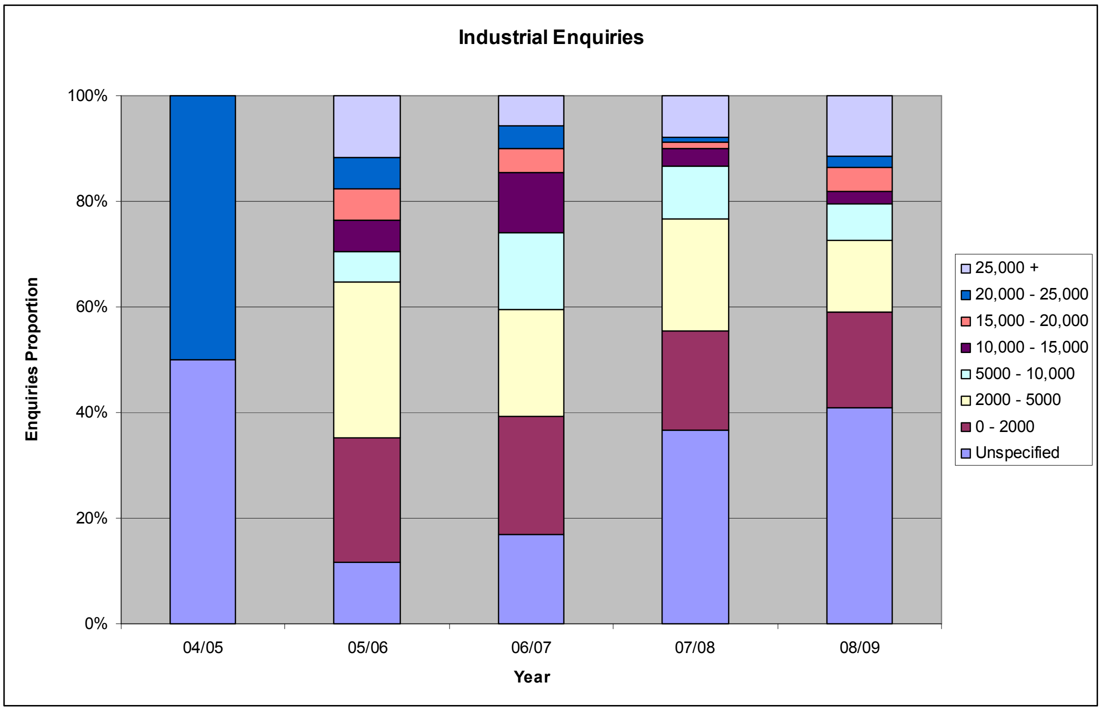


Figure 2 shows that smaller properties under 5,000 sq.ft (465 sq m) are the most popular with prospective occupiers. There are also a large number of enquiries where occupiers have not identified the amount of floorspace that they require.

The economic assessment undertaken by the Trafford Council (see Section 2) shows that there are a high number of small enterprises within Trafford with 83% of the business units in the 10 most popular locations having less than 10 employees. With this in mind, it becomes clear that the core of the Trafford Office market is for smaller offices catering for small, often local, indigenous companies.

Information on historic enquiries is limited in some instances. This is most likely due to the profile of MIDAS growing over the last 5 years, which translates into a more complete picture in 2007. In 2006/07, MIDAS logged 39 enquiries, increasing to 66 in 2007/08. In the period April to September 2008, MIDAS logged 27 enquiries. Enquiries for the year so far, equate to 5.4 enquiries per month, compared to 5.5 for the previous year, representative of a small, but not significant drop. It is possible that the number of enquiries might drop further as the economic downturn, continued monitoring will be required to establish the short, medium and long term impacts this may have on the market.

Figure 3: Industrial Enquiries in Trafford 2004 - 2008



As with office properties, the majority of enquiries appear to be for smaller units under 5,000 sq.ft (465 sq m) and particularly 2,000 sq.ft (185 sq m). Again, there are a large number of enquiries where occupiers have not identified how much floorspace they require.

The number of enquiries for industrial property within the borough suggests that the borough is a more popular location for industrial occupiers than office occupiers, however the number of enquiries also suggest that suggests that the market is less accessible to manufacturing businesses and that they may require assistance to find premises and land to meet their needs. In 2006/07 and 2007/08 the number of enquiries was relatively static at 89 and 90 enquiries respectively. This equates to approximately 7.5 enquiries per month. For the five months from April to September 2008, 44 enquiries were logged by MIDAS, equating to 8.8 mixed use properties per month, a significant increase on previous years; however, the level of enquiries may drop because of the economic downturn, continued monitoring will be required to establish the short, medium and long term impacts this may have on the market as mentioned above.

5.4 Take Up

5.4.1 Office Floorspace Take Up

Using LSH research and FOCUS[4] database of deals done, an estimation of the amount of office floorspace that was taken up within Trafford over the past three years has been estimated. This is set out in Table 10 below.

[4] The FOCUS database is an industry source used by commercial agents such as LSH. It is one of the commercial property databases LSH use alongside EGi (Estates Gazette interactive). Essentially, as part of their marketing exercise agents submit

Table 10: Office Floorspace Take Up in Trafford 2006 – 2008

2006	2007	2008 (Jan-Sept)	2008 (projected)
220,000 sq.ft	200,000 sq.ft	150,000 sq.ft	200,000 sq.ft

In 2006 take up was equivalent to 18,300 sq.ft (1,770 sq m) per month. The largest deals were lettings to Thus PLC at Crossgate in Sale and Yell PLC at Venus in Trafford Park, both of which were under 25,000 sq.ft. Aside from these two lettings, the majority of space transacted was for floorplates under 10,000 sq.ft (930 sq m). Reflective of the type of enquiries received by MIDAS, the majority of deals were for floorspace under 5,000 sq.ft (465 sq m). The most popular areas in terms of the number of transactions were Altrincham, Sale and Old Trafford.

In 2007, take up was equivalent to 16,600 sq.ft (1,542 sq m) per month. There were no deals over 20,000sq.ft. As with the previous year the most popular areas were the established locations of Altrincham, Sale and Old Trafford. Trafford Park also registered an increased number of transactions, particularly at Cobra Park on Barton Dock Road close to the Trafford Centre.

Take up for the first nine months of this year equates to 16,600 sq.ft (1,542 sq m) per month, a small increase on the previous year, however, still below that of 2006. As with previous years, the majority of deals are for smaller units (there were no deals over 20,000 sq.ft (1,858 sq m)), in established locations.

Based upon the above and taking into account anomalous transactions, it is estimated that the average annual take up for offices to be in the region of 210,000sq.ft (19,510 sq m).

5.4.2 Industrial Floorspace Take Up

The amount of industrial floorspace taken up during the same period is far in excess of office take up. Using the same sources as above, the table below provides an approximate level of floorspace take up in the borough of Trafford.

Table 11: Industrial Floorspace Take Up in Trafford 2006 – 2008

2006	2007	2008 (Jan-Sept)	2008 (projected)
930,000 sq.ft	720,000 sq.ft	1,000,000 sq.ft	1,330,000 sq.ft

Take up in 2006 equated to approximately 77,500 sq.ft (7,200 sq m) per month. The majority of deals were below 20,000 sq.ft (1,858 sq m), particularly in the 5,000-10,000 sq.ft (465 - 930 sq m) category. There were a small number of larger deals, with only two over 100,000 sq.ft (9 290. sq m)..

In 2007, take up was significantly less than in the previous year, with monthly take up closer to 60,000 sq.ft. There were no registered deals over 100,000 sq.ft (9,290 sq m) and only a very small number over 20,000sq.ft. As with the previous year and in line with the enquiries information provided by MIDAS, the majority of transactions were for units under 10,000 sq.ft (930 sq m).

Take up for the first nine months of 2008 is already in excess of 2007 and equates to approximately 83,000sq.ft (7,711 sq m) per month. However, this increase is also due to a large deal in January that was over 300,000sq.ft. If this single transaction was taken out, then take up would be in line with the previous years.

properties they are currently marketing to the online database, including details of the property, location, size, lease terms, values etc. The database is comprehensive (although it is recognised that there are instances where gaps exist) and allows agents such as LSH to easily search for the property (by type) which is available in a certain area at any time. In addition, agents also submit the deals they have transacted on the website, this is part marketing for the company but is also knowledge sharing, it provides details of any deals, such as leasehold or freehold, sometimes has the value of the deal (although not always as some terms are kept confidential), size transacted and lease term (if applicable).

Based on the above and taking into account one off, larger deals, it is estimated that the average take up within Trafford for industrial floorspace is in the region of 750,000sq.ft (287,871 sq m) per annum. In all three years, the vast majority of deals done take place within Trafford Park, with a small proportion of transactions in Stretford, Altrincham and Urmston making up the remaining take up.

5.5 Values

Rental values within Trafford are relatively healthy. Achievable rents obviously differ between areas, property types and the quality of accommodation.

Rental levels for offices vary between £20/sq.ft, achieved in good quality new build offices in areas like Hale and Altrincham, to £15/sq.ft at Cobra Court in Trafford Park and £10-12/sq.ft for refurbished space at the Lancastrian Business Centre in Old Trafford.

Rental levels for industrial property vary between £6-7/sq.ft for good quality and smaller new accommodation, particularly in areas such as Trafford Park. Some developers within Trafford Park report values in excess of £7/sq.ft for smaller new build stock. Out side of Trafford Park, rental levels are marginally lower, placed at around £5-6/sq.ft for good quality stock and £4-5/sq.ft for dated larger units.

Yield levels are difficult to determine in the current market. This is due to two main factors, the lack of current investment activity in the market and also the volatility of the market. This makes the valuation of property and the assignment of yields difficult. 12-18 months ago, office properties in locations such as Altrincham were providing yields of 6-7%, these are now more likely to be around the 8-9% range. Industrial properties are also suffering, with yields moving out to around the same level.

Discussions with investment agents who are active in the market in Trafford report that there is little interest from investors. With yields and values being revised on a weekly basis, investors are cautious about putting their money into risky ventures. In recent years, the types of property and location have been significant factors in deciding how to invest. Now, however, investors are much more concerned with the type of company that currently occupies a property and how strong their covenant is.

5.6 Market Perception

5.6.1 Introduction

As part of this study a number of developers and agents were contacted who are active within the South Manchester and Trafford property markets to ascertain their perceptions. The following provides a consideration of their views. This section sets out a general overview of key employment areas such as Trafford Park, Carrington, Altrincham, Sale and Stretford and covers a variety of issues including demand, location, scale and type of development and provides indications of future ‘pipeline’ development that could come forward. Building on this, this section also sets out more specific information on diversification of uses, development pressure, market forces and losses of employment land and competition from other sub regional employment sites.

5.6.2 Demand, Location and Scale and Type of Existing and Future ‘Pipeline Development

5.6.2.1 Trafford Park

Introduction

The most significant employment area within Trafford is the Trafford Park Industrial Estate Trafford Park is the traditional prime location in Greater Manchester. The estate covers over 913 acres (369 ha) in the Trafford borough and was the world's first purpose built industrial estate, opening in the late 19th Century.

Trafford Park has traditionally been Greater Manchester's prime industrial location, with by far the largest concentration of industrial and warehousing space in the area. Many of Greater Manchester's major manufacturing employers – including Kelloggs, Procter & Gamble and Trafford Park Bakery – have both large manufacturing and distribution units on the Park and there are also many multi-let industrial estates popular with smaller scale operators serving the city centre.

A key message from the consultations has been that occupiers seek to locate on Trafford Park because of its image as a key employment area within the North West. At the same time, however, Trafford Park has evolved into a community (business) in its own right. Due to the existence of large specialist manufacturers and occupiers, a secondary network of service companies has grown up, specifically to provide goods to existing occupiers.

Recent deals/ developments include; commercial development projects including 208,000sq.ft distribution unit completed in 2006 and a further 313,000sq.ft (29, 079 sq m) speculative unit in 2007. Adidas are in the process of developing a 360,000sq.ft (33,445 sq m) warehouse on the Park. Other recent development includes a 330,000sq.ft warehouse for Kelloggs and a 257,000sq.ft (23,876 sq m) unit for L'Oreal, whilst speculative multi-unit schemes include Kiwi Park, Ashburton Park and Ashburton Point.

Office Development

Trafford Park has not historically been considered a key office location and its location means that it competes against the larger, more established centres of Manchester City Centre and Salford Quays, both of which are located on the borough's door step. Despite this, Trafford Park has seen increased growth in office development over the past five years. Peel speculatively developed Venus, adjacent to the Trafford Centre. Whilst this office block took some time to let, its proximity to the key leisure amenities of the Trafford Centre, David Lloyd Fitness and the JJB soccerdome alongside the key public transport interchange at the Trafford Centre and its proximity to the M60, means that the development has attracted occupiers from outside the region, most notably a 30,000sq.ft (2,787 sq m) letting to Yell in 2006.

Other key office developments in the park include, Cobra Court on Barton Dock Road. Phase One consisted of 12 self contained units totalling over 94,000 sq.ft (8,732 sq m), the majority of which has been successfully let. Phase Two, consisting of 16 units over 80,000 sq.ft (7,432 sq m) .is already being brought forward on the back of Phase one's success. Other key office developments are Property Alliance's Box Works on Ashburton Road West (providing 30,000 sq.ft (2,787 sq m) over 4 floors). Significantly, Property Alliance was also considering developing 90,000 sq.ft (8,361 sq m)of speculative office space between Ashburton Road and the Bridgewater Canal. However, due to the 'credit crunch', they have revised plans for the site and are offering trade counter and industrial development on a design and build basis.

Pipeline Development

There is also further development activity in the pipeline. KPI Properties, the joint venture partnership between St. Modwen Properties and Salhia Real Estate, has submitted plans for a 162,000sq.ft (15,050 sq m) office and light industrial development on a 10 acre (4ha) site adjacent to the new Adidas warehouse. The new scheme, to be called Avro Park, will be built speculatively in two phases. It was planned that the units would be ready for occupation in Summer 2008, however, we believe that development on site has stopped and a final completion date is not yet known. Further development is likely to arise with the sale of a 5.2 acre (2.1ha) site currently being marketed by the Kelloggs Group, which is expected to attract a high level of interest because of the scarcity of land in the area. Further activity is also expected as new investors Brixton seek to maximise the investment potential of their holdings following their acquisition of 2.7 million sq.ft (250,838 sq m) on the Park.

Diversification of Uses

Interestingly, the benefits of the new MediaCity:UK development (which is proposed in the neighbouring local authority area of Salford) are considered to extend to industrial operations on Trafford Park. Whilst it is anticipated that the arrival of the BBC, potential relocation of Granada and the University of Salford to the MediaCity site have helped to grow demand for office space on the park, some landowners are already seeing interest from companies (such as production services) who require industrial units for the storage and distribution of equipment and goods to serve the incoming companies.

Trafford Park Masterplan - Trafford Park Masterplan Baseline Assessment August 2008 and Trafford Park Vision and Implementation Report October 2008

This section provides a brief overview of the work thee baseline assessment and vision and implementation report prepared by EKOS consulting for Trafford Council. Together the documents provide a comprehensive analysis of Trafford Park covering development trends and patterns, infrastructure constraints, landownership, and qualitative analysis involving consultation with a wide range of stakeholders etc. The information has then been interpreted and used to inform the development of a vision for Trafford Park, which will be used to form the basis for the development of a masterplan for the area. The Trafford Park Vision is:

"Trafford Park - the North West's Premier Business Park - will build upon:

- *its location at the heart of one of Europe's leading City Regions;*
- *its heritage as the region's leading industrial hub;*
- *its excellent road, rail and waterway connections; and*
- *its proximity to a internationally significant creative industries cluster*

to create a set of successful and sustainable business environments which meet the aspirations of new and existing:

- *knowledge based companies,*
- *high value manufacturing clusters with future growth potential,*
- *multi-modal logistics, and*
- leisure and visitor sectors.

This vision will be achieved through attaining the following objectives:

- **Meeting the Demand from a Diverse Range of Sectors**: To continually adapt the Park in a planned manner through the promotion of quarters/districts which meet the demand of modern businesses from a diverse range of sectors. Three districts are highlighted and distinct strategies for each one proposed: Trafford Wharfside; Trafford Rectangle; and Trafford Park Core.
- **Improving Transport Infrastructure**: To provide a transport infrastructure which increased accessibility to, and navigation in, the Park.
- **Delivering Critical Infrastructure**: To ensure that utilities and other business critical infrastructure is competitive with the premier business locations nationally and internationally.
- **Marketing and Promotion**: To maintain high levels of new investment in Trafford Park through strong branding and marketing which promotes the Park and the Regional Centre as a leading location for inward investment
- **Supporting Competitive Businesses**: To provide supporting actions which help existing and new companies to improve their competitiveness.

Key Issues

The economic analysis concluded that the Park is currently healthy in terms of employment and business numbers, however faces future challenges with the long term decline of manufacturing employment in the UK as well as the current economic climate. The current public transport accessibility situation is an issue for some businesses and employees and needs improvement. There is a high skills deficit in the immediate area, which needs to be addressed as it is tends to demonstrate that all sectors will require higher level skills in the future.

The Park comprises a relatively fragmented ownership including institutional investors; national and local property companies; high net-worth individuals; owner-occupiers; and football-related interests. The level of fragmented ownership on the Park reinforces the need for a comprehensive, broad-ranging consultation on the potential future direction of the Park, as comprehensive redevelopment is likely to be challenging. However whilst the Park does have over 200 known ownerships, there are a few large strategic landowners such as Peel and Brixton which account for a significant proportion of land on the Park.

Development opportunities on the Park are limited due to a lack of available sites although there are believed to be up to five relatively major sites which are available on the market / set for development. Consultation with landowners and investors in the Park has revealed a series of key issues for the Park, including the introduction of a higher value offering; the increased standard of industrial product being brought forward; congestion charging; Section 106 payments; the potential extension of the Metrolink; and the security and visibility of sites.

5.6.2.2 Areas outside of Trafford Park

Introduction

Outside of Trafford Park, demand for industrial premises is limited to a small number of locations. These locations, such as Carrington, Altrincham, Sale and Stretford, are clustered around the A56, which bisects the borough and provides good access to the M60 and M56 motorways. Congestion on the A56, particularly during peak times, means that these areas could be constrained and struggle to attract occupiers from the wider region. Stretford benefits from its proximity to Trafford Park, whilst charging lower rents. Stock is primarily characterised by lower quality second hand properties, with little development activity in the pipeline.

Altrincham and Sale

Sale has a number of smaller industrial estates, grouped around proximity to the M60 motorway, particularly in locations such as Dane Road and Glebelands Road. These units are again characterised by second hand, dated stock. From consultation, it is understood that there is some potential development activity in the area, with a 13,000sq.ft unit being developed by Schneiders and there is a further proposal for 14,000sq.ft (1,301 sq m) of industrial floor space at Skelton Road in Timperley.

Altrincham has the largest concentration of industrial premises outside Trafford Park, located on the Broadheath and Atlantic Street Industrial Estates. These estates tend to cater for occupiers within the local Trafford Market, with very few larger occupiers from outside the borough and region. There are some larger companies, such as Travis Perkins who have a number of units within the area; however, these tend to be trade counter uses, focusing on supplying local industry. Much of the stock within the Altrincham market provides second hand accommodation. There are few proposals for new development of industrial floorspace.

Altrincham and Sale have a much stronger position with the office rather than the industrial market. They form two key components of the wider South Manchester market and thus are competing at a sub regional level. In particular, Altrincham has a wide range of demand with occupiers from local and sub regional backgrounds. Locations for key office properties vary from Altrincham town centre, through to Hale Village. These locations are competing against locations such as Stockport Town Centre, Cheadle and Manchester Airport.

Despite appearing remote from the other key office centres in the region, such as Manchester and Salford, Altrincham has good transport links, serviced by both the Metrolink and railways lines from central Manchester. In addition to this, the town is close to Junction 7 of the M56 which provides good access to the M6 and the A56 providing access to Manchester City Centre and the M60. In addition to this, Altrincham and Hale have well established leisure facilities and provide a range of amenities and services for occupiers and their staff.

Key recent deals within Altrincham include, Styles and Wood taking 20,000 sq.ft at Aspect House on Manchester Road and Mott McDonald taking 18,500sq.ft (1,719 sq m) at Spring Bank House (planning permission has also been granted for a 15,000sq.ft (1,393 sq m) expansion). Recent and upcoming developments include, the Scroder Exempt 45,000sq.ft Altrincham Business Park on George Richards Way (which was developed speculatively). The former British Gas site on Moss Lane has been developed out as a business park including warehouse and distribution units and 25,000sq.ft of office units by Marshall. The adjacent Parkfield House was refurbished in the late 1990s and has potential to be redeveloped in conjunction with a site to the rear to expand the business park on Scots Drive or provide further residential units, which have also been developed on part of the former British Gas site. 60,000sq.ft (5,574 sq m) of offices are also proposed as part of Nikal and David McLeans redevelopment in the town centre and a 30,000sq.ft (2,787 sq m) development at the former Bayer site on Manchester Road in Broadheath.

The attractions for Altrincham are broadly similar to those in Sale, although Altrincham has more instances of higher end premises. The town centre is well served by the metrolink system and the A56 provides access to Manchester City Centre and the M60. Much of the key office properties are located close to Cross Street (A56). Key deals include 18,500sq.ft (1,719 sq m) taken up by IBM at Jackson House on Sibson Road, Slater Heelis Collier Littler taking 15,500sq.ft (1,393 sq m) at Dovecote House and Trafford Housing Trust taking 12,000sq.ft at Marshall House on park Road. There is not as much new development planned within Sale as in Altrincham, primarily due to a greater scarcity of land available.

Carrington

There is a significant amount of interest and activity surrounding Carrington in the west of the borough. In particular, the Carrington First scheme, which is being brought forward by MARO developments, will look to provide over 600,000sq.ft (55,742 sq m) of industrial space on a 44 Ha former power station site. There were previous plans to provide a multi modal scheme of over a million sq.ft (92,903 sq m) which was allocated within the development plan and known as Trafford Interchange. However, following a Direction from the Secretary of State, the Trafford Interchange proposal at Carrington was deleted from the revised development plan for the Borough because it was not in accordance with PPG2 Green Belt advice – specifically that exceptional circumstances had not been demonstrated to support the proposal to remove a significant area of land from the Green Belt to accommodate the proposed development

However, this scheme has now been sidelined due to the cost of reopening the Altrincham Irlam railway line and competing schemes from Peel at Barton Moss and the proposed Port of Salford, both of which are in close proximity.

Other schemes at Carrington include Bridestone's proposals to redevelop the former coal fired power station site for a new 860 MW gas fired power station. Plans for the development were approved by the Department for Business Employment and Regulatory Reform in Summer 2008 and site clearance and investigations commenced in January 2009. Detailed plans for the site have yet to be approved, but it is calculated that the construction phase will generate 600 jobs with 50 full time jobs at the power station once it becomes operational in 2012/13. The benefit of having a significant power generator on the site will help to attract large, power hungry companies which would have difficulty finding suitable sites elsewhere in the region.

In addition to this, SAICA, a Spanish owned multi national which produces corrugated cardboard, has recently acquired some 16 hectares of land at Carrington and has been granted planning permission for a £250million development that will provide a new high capacity facility which is expected to create in the region of 200 jobs.

Both the SAICA and Power station proposals show that Carrington has the both the potential and the capacity to attract high profile users. This is complemented by the areas transport links with the wider region, particularly via the M60 and proximity to Manchester Airport. It is also hoped that the investment in the area from the above companies will help to stimulate further public sector investment, particularly in the form of upgrading the A6144. This will help to make Carrington more accessible to the motorway network and improve the image of the area, attracting further companies and opening up new development opportunities.

Davenport Green

As part of the consultations, there was also discussion on the potential for the development of Davenport Green, which is a 36.4 Ha Greenfield site located in the Green Belt allocated in the Trafford UDP and identified for business park development off Junction 6 of the M56. The nature of the proposed business park is for a very specific form of employment development with significant requirements/ conditions relating to the design, landscaping and management of the surrounding rural park area any future development would be set within. Trafford Council have suggested that of the 36.4 Ha only 7.28 Ha is capable of being occupied by buildings in order to provide a high quality landscaped setting. The majority of the site will remain greenfield and within the greenbelt comprising a rural park of approximately 99 Ha. Uses within the site are heavily restricted to providing high quality, science based/high technology industry units ; Research and development activities and Headquarters office activities. There are also issues with accessing the site, as Manchester Airport controls the land required to develop a new access point.

The site is currently owned by Muse Developments and despite being allocated through the previous plan period; it has not yet come forward for development. The owners of the site have also been consulted, who feel that the site still offers an opportunity to build a mix of high quality employment floorspace incorporating offices and industrial development. These types of uses are not identified as permittable uses within the revised Trafford UDP.

Manchester Airport

As part of our consultations, we have discussed the future expansion of Manchester Airport with Manchester Airport Developments Ltd and had regard to the Manchester Airport Masterplan. The result of these investigations is that the airport are considering on expanding both their core operational areas over the next 20 years, alongside their non core complimentary development opportunities. Key to this will be an intensification of uses which exist on the site, redeveloping some areas to provide more efficient use of land, this will mainly effect the core operations of the airport, focusing around buildings and uses which will no longer be fit for use or can be improved with technological advancements. Within the Airport masterplan, the following key sites have been identified for future development (Please Note: none of these sites are within the Trafford Borough Boundary):

- Area A – Land to the East of the A538 (38.5ha) – close to existing taxi and run ways, potential for expansion of core operational facilities and extension of the West side maintenance village.
- Area B – Land to the North of Ringway Road (30ha) – Potential to expand number of car parking facilities attached to the airport and extend the Ringway Trading Estate for Airport related operational and commercial activity.

- Area C – Land within Junction 5 of the M56 (12ha) – location directly off a main M56 junction provides the opportunity to expand complimentary airport uses, such as hotels, offices and car parking
- Area D – Land to South of Ringway Road (6ha) – Subject to the completion of the A555 to the airport there is the potential to provide space for commercial uses linked to the airport but which do not require direct 'apron' access.
- Area e – Land to the West of the A538 (38ha) – Potential for car parking on site. Most significant potential is for the relocation of the World Freight Terminal, which would also open up the potential for redevelopment of terminal 2. Development would be limited to those uses directly associated with the Airport's core operations.

Based on the above, it is clear that Manchester airport have already identified a number of potential development opportunities connected to both their core and non core operations for the period to 2030.

5.6.3 Development Pressure, Market Forces and Losses of Employment Land

Trafford Park

After consultation with developers and land owners active within Trafford Park, it is clear that one of the major issues facing the Industrial Park's future is the availability of land. There is little scope for the expansion of Trafford Park, as all the land surrounding it has been developed. In order for the park to grow in future years and continue to perform at its current level, it is obvious that pressures on land inside the estate will grow. One developer pointed to fragmented land ownerships within certain areas that acted to prevent redevelopment, as the cost of acquiring multiple interests made development lengthy and only marginally viable.

In addition to the pressures on land for established industrial uses within the park, concerns were also presented to us about the loss of what remaining land there is to alternative, higher value uses. In particular, sites around the northern edge of the industrial estate, close to Salford Quays, Old Trafford and the new MediaCity:UK, are under pressure to be redeveloped for office and leisure uses. It was acknowledged that these uses have a part to play in the growth of the park; however, the concern was that land available for traditional industrial development was under threat and the core use of the park was in danger of being diluted. This concern was also highlighted over the growth of the Trafford Centre. Due to the wide range of amenities and transport facilities available to occupiers, it was envisaged that sites around the Trafford Centre could also be potentially lost to office uses.

Areas Outside of Trafford Park

As well as Trafford Park a key issue for employment properties within the South Manchester market is also the loss of land to alternative uses. In particular, residential development could potentially lead to the loss of land, primarily due to the historic buoyancy of the Trafford residential property market, which is one of the most popular in Greater Manchester. The loss of land to this alternative use has been slowed in recent years due to a housing restraint policy put in place by the Council and is likely to be further constrained by the turmoil currently being felt in the residential development sector, particularly due to a lack of finance. The developers and agents that were consulted felt that the loss of land of alternative uses should continue to be monitored; however, they were confident that the appeal of the market in the area was such that if sites were viable for employment development they would still come forward. They were concerned that development was focused around suitable locations, with good links, and that these be safeguarded for the future.

5.6.4 Competing Sub Regional Sites

Whilst the Borough of Trafford has Trafford Park, one of the North West's premier industrial locations, there are a number of key sites within the wider city sub region which will compete to attract new occupiers and inward investment. In particular, the completion of the M60 orbital motorway in 2000 has opened up a number of other boroughs for development and investment, effectively challenging Trafford Park's status as the sub region's premier industrial centre.

The key competing sites include, Heywood Distribution Park owned by SEGRO in Rochdale, which primarily provides space for large B8 distribution companies such as the Royal Mail, Next and Argos. The distribution park is able to provide single units of c 400,000 sq.ft. (37,161 sq m). Also planned in Rochdale is the Wilson Bowden development's Kingsway Business Park, a regional strategic investment site which will potentially be able to accommodate almost 3 million sq.ft (278,709 sq m) of employment floorspace. Progress at Kingsway has been slow to date, however, completion is expected on 5 units totalling 181,000sq.ft (16,815 sq m) later this year.

Oldham has also seen a rise in investment. In particular, Royal London Asset Management redeveloped the Kawasaki building in Chadderton, with a 336,000sq.ft (16,185 sq m) shed. Teesland IDG also completed a 183,000sq.ft (17,001 sq m) unit at Oldham Broadway earlier this year.--

Within the borough of Tameside, with good access to the M60 orbital motorway, Muse developments (formerly AMEC) are phase building the Ashton Moss business park which will eventually provide almost 1million sq.ft of floorspace for a range of B1, B2 and B8 uses, alongside complementary retail and leisure uses. Recent completions include a 250,000sq.ft (23,226 sq m) warehouse for Office depot and a 51,000sq.ft (4,738 sq m) pre let to Norbain.

Within Wigan, Sapphire is a proposed extension to the South Lancashire Industrial Park, which will potentially provide a further 80 acres (32.37ha) of land for employment development. The South Lancashire Industrial Park benefits from good access to the M6 and the A580 East Lancashire Road.

Closer to the borough of Trafford lies the key Manchester employment areas of Roundthorn and Sharston Industrial Estates. These industrial estates rely on their proximity to Manchester Airport and the M56, attracting a range of B2 and B8 occupiers. Also capitalising on the proximity to Manchester Airport are a number of key B1 business parks, such as the Manchester Business Park, which provide Grade A office accommodation.

In Salford there are a number of significant schemes coming forward; these include phase 3 of the Agecroft Commerce Park, which will provide a further 35 acres (14.16ha) of land for development, potentially accommodating a further 500,000sq.ft (46,452 sq m)of floorspace. Recent completions since 2001 include a 170,000sq.ft (15,793 sq m) distribution centre for Bunzl, a 55,000sq.ft (5,110 sq m) warehouse for Securicor and a 90,000sq.ft distribution unit for Nimans. Speculative development is also ongoing with Langtree's Equinox scheme.

Peel Land and Property are also bringing forward a scheme for the Port of Salford, located on the Manchester Ship Canal which will potentially provide 200 acres (81ha) of land linked to a new multi modal freight terminal. Salford Quays provides one of the premier office accommodation centres outside the city of Manchester itself, and will soon be developed by almost 500,000sq.ft (46,451 sq m) of new office accommodation at Middlewood Locks close to the M602.

Outside the immediate Greater Manchester boundaries lies the key employment centre of Warrington. Significant development has been ongoing at Birchwood Park, with a wide range of B1 occupiers. Within the pipeline, is Omega Park which will be brought forward by Miller in partnership with the RBS and backed by English Partnerships. It is expected that Omega Park will provide 500 acres (202ha)) of land and almost 7million sq.ft (650,321 sq m) floorspace for a range of employment, conference, retail and leisure uses.

On a wider regional basis, the borough of Trafford (particularly Trafford Park) will have to compete against potential new developments at Basford East and West in Crewe, Midpoint 18 in Middlewich, South Rings Business Park in Preston and Revolution Park in Chorley. It is important that Trafford maintains a competitive supply of land for both new development and the redevelopment of employment space, providing a range of accommodation for local, sub-regional, regional and national occupiers.

In addition, discussions with Consultees included potential issues over competition for Trafford. On the whole, they appeared unconcerned by development in other boroughs. It was their opinion that Trafford Park was the location in Greater Manchester for industrial properties and the name itself attracted occupiers from across the country. These types of occupiers rely on national networks and Trafford was seen as the best connected borough within the conurbation. This was coupled with easy transport links into Manchester and the growth of leisure amenities alongside the Trafford Centre.

In terms of the office market, developers pointed out that Trafford competes within the South Manchester market and that occupiers were unlikely to begin looking at North Manchester locations, where perceptions of amenities and the environment were not as high. They did acknowledge that the borough had competition from Stockport and North Cheshire (towns such as Wilmslow, Knutsford and Alderley Edge), however, they felt that Trafford had superior transport links, particularly with the Metrolink, and that there was a reasonable pipeline of development, particularly in the view of current financial complications.

5.7 Consultation with the North West Development Agency (NWDA)

As part of the consultation exercise for the Trafford Employment Land Review, we also consulted with the NWDA. From this discussion it is our understanding that the NWDA is seeking to consult with Trafford Council and EP/HACA to discuss ongoing priorities for the Borough and how the NWDA would fit into any future projects.

In general the NWDA considered Trafford to be a prosperous Borough, where development is often financially viable without any form of intervention. The relative prosperity of the Borough means that intervention measures the NWDA can employ in other areas cannot be used in Trafford. Generally, the NWDA would not get involved in projects within Trafford unless they can be shown to have a wider impact on the regional centre (Manchester City Region) or make a significant impact on strengthening and growing the regional economy.

At present, the NWDA is involved in two studies which involve Trafford; the first is the Trafford Park Masterplan (see Section 5.6.2.1), which the NWDA expects to look at how Trafford Park can be aided moving forwards in the 21st Century. Primarily, this looks at the sustainable economic future of the park and issues such as accessibility and identifying under utilised land in order to bring forward future development. It is expected, however, that Trafford Park will maintain its traditional role as a key commercial and industrial hub for the region.

The NWDA are also funding a study for Manchester Enterprises on the role of town centres within Greater Manchester. This will include looking at towns such as Altrincham and Sale and how they contribute to the wider sub regional economy, including looking at future growth potential.

A critical issue at present is the Strategic Regional Sites Review in the North West. This sets out recommendations for key strategic sites of regional significance with regards to whether they should be retained or deleted from the Regional Economic Strategy or whether new sites should be considered. The review recommends that both Davenport Green and Carrington in Trafford are deleted from the RES. This is reflected in the draft schedule of proposed sites which was issued for consultation in early 2009 and ended in March 2009.

Other areas of interest for the NWDA include:

- Trafford District Centre, clustered around the town hall and the key stadia of MUFC and LCCC. The NWDA is interested in the potential for creating and growing commercial uses linked to sports that can grow around these two sports nodes and increase the area’s profile as a visitor destination.

- The Irwell Corridor is seen as a key area which could link Salford and Trafford Quays with the regional centre, linked to key growth sectors not just confined to the growth of media industries. With the presence of the metrolink and other key transport routes, this is seen as an opportunity to grow the regional centre and improve wider links with the sub region.

5.8 Stakeholder Workshop Session

5.8.1 Introduction

A workshop was undertaken on 8 October 2008 when a number of stakeholders were invited to attend to discuss the employment land demand requirements for Trafford. During the session the findings of the forecasting models and scenarios were presented to provide a framework for discussion. This section sets out the key issues discussed this session and follows the discussion framework used to structure the session. This included discussions on general issues viewed to impact on employment land demand, current and future employment trends, losses of employment land and displacement of businesses, the implications of applying a margin of choice, impacts of Media City and views on the initial range produced from the forecasting in Section 4 of this report.

5.8.1.1 Trends: Will these change in the future?

Discussions included establishing what trends the stakeholders considered most likely to continue or occur over the short, medium and long term in Trafford and how this may effect employment land demand.

Trends in Employment Land Take Up

Recycling of employment land is a strong characteristic of Trafford, especially Trafford Park and Carrington. It was considered that there was a lot of recycling to be done in these locations as well as elsewhere in Trafford. Consequently it was generally considered that that the historic take up rates presented at the presentation are exaggerated due to the level of churn/ recycling of employment land (i.e. a significant proportion of the historic take up rate is on land that was previously in employment use and therefore is not additional take up).

Moving towards Higher Density Uses

It was viewed that office working is most likely to change and due to advances in technology and that it is likely that there will be increases in home working. Culturally home working has not been as popular as expected, however this could increase as Trafford moves towards a knowledge economy and consequently this could result in a reduced demand for employment land as businesses begin to adopt more flexible working patterns that require less floorspace. It was also considered that there could also be changes in distribution business. Issues discussed included how in the past more centralisation was expected but actually the trend has moved towards regionalisation of storage and distribution facilities. It was suggested that there could possibly be a trend for multi-storey B8 development such as the Aslam centres already being developed at Heathrow; therefore the density of B8 development might increase. In contrast to the general trend of high density employment development it was also noted that the growth of advanced manufacturing suggests job losses may not reduce the need for land for B2 as much as assumed due to the losses usually being due to increases in mechanisation that still require land, particularly given many marginal B2 employers have already been lost and that growth of this sector may be important to bring the economy out of recession. Furthermore, B2 buildings might undergo changing specification requirements due to increased mechanisation and use of electricity.

Market Forces and Displacement of Employment Uses

Stakeholders identified that there was a risk of market failure in Trafford with regards to provision of land and premises for SMEs, small indigenous business and low amenity uses. Consequently it was considered that Trafford may have a limited offer for SMEs and low amenity uses as market forces are displacing these uses and this was a key issue whereby displaced businesses do not have a choice for alternative sites and premises elsewhere on the site and the district. However it was considered that areas such as Trafford Park could accommodate displaced uses zoning approaches were developed correctly. .

5.8.2 Loss of Employment Land to other uses

Generally it was considered that the analysis of employment land losses was accurate in relation to sites lost to residential uses, however it was noted that land lost to leisure uses at Trafford Quays could suggest that this figure is slightly low. The stakeholders did not expect that the rate of employment land losses would change significantly and that the drivers for employment land losses such as residential and leisure uses are likely to continue to come forward at the same rate and scale.

In addressing employment land losses it was viewed that planning policy could be key to this, as the market will continue to push other more profitable uses. It was considered that sites and premises are effectively priced out of the market and ‘manufactured’ for release from employment use.

In addition, a key issue raised was concern that losses are to the detriment of small, indigenous businesses (SMEs) and low amenity uses that are often displaced due to development of non employment uses and/ or development for larger employers. This is often compounded by a lack of choice of alternative sites and premises and could lead to businesses located in neighbouring boroughs. It was stressed at the workshop that SMEs and low amenity uses are critical to local economies and therefore need to be accommodated within the borough.

5.8.3 Margin of Choice

The workshop groups were also asked to provide views on the development and application of a margin of choice for employment land demand. A figure of 20% was suggested in accordance with other employment land studies produced in the region. Overall it was viewed that a 20% margin of choice was too high as most criteria for location by sector are the same. In addition, it was considered that at 20% there was potential that other uses such as leisure development (which is an aspiration for the Council) would be restricted from developing. It was considered that the introduction of mixed use allocations should be considered when developing the Local Development Framework and that this could provide the flexibility needed to address the issue of choice. In addition, it was noted at the workshop that stakeholders felt that non employment uses (i.e. Hotels, Cafes, Nurseries, Doctors Surgeries, Catering Services and Gymnasiums etc) in employment areas are critical in attracting high end employees and to ensure that developments are sustainable.
Implications of Media City: UK

The key issue discussed was the need to understand the scale of Media City and the impacts this will have on neighbouring areas, in particular the Trafford Park Masterplan which includes some employment land loss to media industries. Other impacts included the potential need for higher value uses such as housing to support Media City and Trafford. In developing a greater understanding of Media City it was considered that there was a need for specific monitoring arrangements to be developed in order to identify the implications of losses and the indirect impacts this has on employment premises and land needs from ancillary employment uses to Media City. In terms of indirect impacts on employment land it was considered that increased demand for B8 space in Trafford as a result of MediaCity:UK is likely to minimal, however other sectors such as related to ICT could see a positive impact.

5.8.4 Employment Land Demand Range

The quantitative demand modelling work undertaken and originally presented at the workshop event identified a gross requirement for employment land of between 85ha and 238ha from 2007 to 2026 (this figure has been amended since the stakeholder sessions to take account of the recycling employment land, please see Section 4 and 5.10 for more detail). This formed the basis of discussions at the workshop were it was identified that the middle to lower end of the range was the most realistic amount for Trafford with a lower margin of choice than 20%. In general the workshop attendees felt that the low end of the range was too low, whilst the upper end of the range was possible as it was felt that historic take up rate was likely to continue, however it was felt that this figure is skewed by the degree of recycling of existing employment land and therefore the take up rate will be dependant on the degree 'churn' and recycling of land over the next 5 – 10 years.

The range originally presented at the stakeholder's workshop was between **85ha** – **238ha** for the period of 2007 – 2026. However, following the feedback from stakeholders the demand forecasting was revised using different quantitative methods. This resulted in a new range of **63ha - 281ha** for the period 2007-2026 (please see section 4 for full details of this range). This is because the methodology has been revised following discussion with Trafford Council regarding the recycling of land in the Borough. However based on stakeholder responses to the original range (that the lower end was too low and the higher end too high) and the fact that this revised range is greater than the original range it has been necessary to revise the range for employment land demand taking into account the qualitative demand assessment.

In revising the methodology the historic take-up land based projections were revisited as these estimates are the most basic. It is clear from the data on historic take-up land that the historic take-up rate ranges from 5ha to 33ha and that historic take-up over the past 7 years has been very volatile. This is a very large range and these outliers can skew the average (mean) annual employment land take-up rate. Therefore it has been appropriate to consider other methods for estimating the average of the historic take-up rates in Trafford.

In statistics you can use the median and the mode as different estimates of the average of a data set. These types of averages are less influenced by irregularly large and small observations. The mode is the number that occurs the most in the dataset, while the median is the number which lies in the middle of the dataset once it is arranged in descending (or ascending) order. Table 12 below presents the data on historic take-up rates arranged in descending order and also rounded off to the nearest hectare. It is clear from Table 12 that in this case both the median and the mode are 9ha.

Table 12: Historic Employment Land Take-up in descending order

Year	Total Land Area Developed (ha)
2004	33
2006	26
2003	17
2007	9
2001	9
2002	6
2005	5

If we then use 9ha as the average annual then the projected employment land demand in Trafford over the period 2007-2026 is as given below in Table 13.

Table 13: Employment land –demand 2007-2026 based on average annual total land take-up of 9ha

	Future Employment Land Demand 2007-2026
Current average annual take-up p.a.	9ha
2007-2026 total requirement	**171ha**

Additionally given that the data for the Lower Growth Scenario of the GMFM was incomplete, the estimates for this scenario are not as reliable as those for the other scenarios. Therefore, it is more robust to consider the results for the Baseline and AGS scenarios.

5.8.5 General Issues

This part of the discussions focused on gaining opinion on the more general strategic issue facing the borough that had not been discussed in the other topics.

It was identified that the A56 corridor will become more attractive for office developments due to improved links to Trafford Park and that there is likely to an impact on southern part of the Borough due to the growth of Manchester Airport.

It was also considered that development of Greenbelt/ Greenfield land along the M56 corridor was a realistic source for meeting employment land requirements, particularly if/ when previously developed land begins to ‘dry up’.

In considering employment development the emerging Local Development Framework will need to consider distribution of employment land across the Borough as well as the quantity.

It was also viewed that the recycling of land is a key issue in the borough and is likely to require specific monitoring of existing sites with a view to maximising the employment generating floorspace created by them.

Architecture and design quality was also viewed to be a key issue and that buildings will need to be more flexible and able to adapt to changes in the market i.e. switching from B1 office to residential etc.

5.9 Conclusions and Implications for Demand

Our discussions with stakeholders have identified a number of key issues that have implications for the findings from the quantitative demand chapter. Combined, these findings suggest the following conclusions:

1) The majority of employment land take up in Trafford has historically been on land previously in employment use. Further, it is widely considered that Trafford Park is the economic and employment ‘engine’ for Trafford and is a site of regional significance. It is anticipated that Trafford Park will accommodate a significant amount of future employment land demand in future through more efficient use of existing employment land. However there are concerns that the industrial core will be displaced due to market pressures for higher value development.

2) There is a general view that sites such as Carrington and Davenport Green are attractive to the market for employment development. Carrington in particular has significant ‘pipeline’ development planned and speculative office and light industrial development.

3) Altrincham and Sale have the significant concentrations of office development in the borough and are considered to be attractive areas for such development due to their locations. Altrincham also proving the largest amount of industrial premises outside of Trafford Park, however the stock is generally outdated.

4) It is estimated that the average annual take up/ occupation for offices in Trafford is in the region of 210,000 sq.ft (19,510 sq m), with the majority of development being below 5,000 sq.ft (465 sq m).

5) It is estimated that the average take up/ occupation within Trafford for industrial floorspace is in the region of 750,000sq.ft (69,677 sq m) per annum and in the last three years the vast majority of deals done take place within Trafford Park.

6) Outside of Trafford Park, demand for industrial premises is limited to a small number of locations. These locations include Carrington, Altrincham, Sale and Stretford.

7) There is evidence of increasing competition from sites in other areas of the sub region and region that Trafford will need to consider. In Greater Manchester examples where provided in Wigan, Oldham, Rochdale, Tameside, Manchester and Salford, whilst regionally Warrington, Crewe and Middlewich were also mentioned. However, stakeholders where generally not concerned that competing sites would have a significantly detrimental impact on the Borough.

8) There is evidence of employment land losses to other land uses. Although the rate of losses are fairly limited and the trend is likely to continue at the same rate rather than experience a significant increase this is still a key issue for consideration when identifying future employment land through the LDF.

9) The recycling of existing employment land is likely to continue in the short – medium term, which is likely to reduce the need for additional land (i.e. land that has not been previously used for employment purposes).

10) However, additional land is likely to be required in the long term and factors such as displacement of existing businesses due to market forces, employment land losses due to development pressure form other land uses (i.e. housing, retail and leisure etc) could exacerbate the need for new sites to be identified.

11) There was concern that SMEs and low amenity uses are constrained by a lack of choice and range of employment land and premises in Trafford. It was considered that many indigenous businesses are being ‘forced out’ of existing employment areas due to market forces and had limited opportunities to relocate elsewhere in the Trafford.

12) A 20% ‘margin of choice’ was generally considered to be excessive by stakeholders and that the current and future supply of land, in particular previous and existing employment suites would meet demand. Consequently, at the request of Trafford Council a margin of choice will not be applied to the future demand requirements of the borough.

5.10 Refining the Demand for Employment Land using the Quantitative and Qualitative Evidence

Taking into account the discussions in this section and particularly section 5.8.5 which sets out the revised quantitative forecasting undertaken in response to stakeholder’s comments and the views of Trafford Council it is reasonable to assume that a refined range of around **100ha** – **170ha** of employment land will be required in Trafford for the period of 2007 – 2026. This equates to approximately **5.3ha** – **8.9ha** per year.

6 Employment Land Detailed Site Assessments

6.1 Introduction

In determining sites to form a new portfolio of land for employment development it is critical to identify which sites can contribute to additional employment land. By definition, additional employment land is land that has not/ is not used for employment uses. Therefore the only sites that can be considered to contribute to additional land supply are those that have been previously developed for an non employment use (such as residential or retail) or land that has no history of development (i.e. Greenfield land).

For this employment land study, Trafford Council have carried out a detailed assessment of the current and potential employment land sites within Trafford.

This was completed in terms of location, availability and deliverability. Sites included in the site assessment stage of this commission consisted of 49 sites in total, divided into two categories of potential employment sites.

- 42 existing Allocated Sites in the Trafford UDP (of which 8 sites were also submitted as part of the Trafford land Allocations Plan Consultation);
- 7 sites that were/ are in employment use but are not allocated in the Trafford UDP (of which all 7 sites were submitted as part of the Trafford land Allocations Plan Consultation.

The sites total almost 383ha and are discussed below and the results of their assessment presented in Appendices C and D.

6.1.1 Existing Allocated Sites

The detailed assessments undertaken by Trafford Council looked at 42 sites that are allocated in the Trafford's existing UDP. These sites totalled around 345ha and where a combination of sites that had been cleared of their previous employment use and sites were still actively being used for employment uses. Of the 42 sites, eight sites had been put forward for employment development for the Trafford Land Allocations DPD and totalled approximately 228ha.

The range of sites varies considerably from 0.25ha up to approximately 177ha. The majority of sites (35 sites) where below 5 hectares in size and totalled just over 50ha. Of the remaining seven sites, two are approximately 6ha, and the rest are approximately 16.5ha, 26ha, 27.5ha, 34.5 and 178ha respectively.

Table 16: Summary of Allocated Employment Sites Assessed by Trafford Council

Site Ref	Site Name	Site Size (Hectares)	Type of Site
32132	Land at Carrington *	176.90	Uncleared Employment PDL
42002/00	Davenport Green *	36.40	Greenfield
32008/00	Shell Chemical Works, Carrington North *	4.50	Greenfield
72094/00	Former Kratos Site *	3.60	Uncleared Employment PDL
10133	Altair *	2.99	Uncleared Employment PDL
10039/00	Bayer site, Manchester Road *	1.72	Uncleared Employment PDL
70025	Victoria Warehouse *	1.03	Uncleared Employment PDL

Site Ref	Site Name	Site Size (Hectares)	Type of Site
12020/00	Land at Craven Road *	0.80	Cleared Employment PDL
32019/00	Former Gas Works Site, Manchester Road	27.60	Uncleared Employment PDL
32013/04	Former BP Terminal, Manchester Road	26.00	Cleared Employment PDL
32012/01	Former Powergen Site – Phase 1, Carrington North	16.54	Cleared Employment PDL
32005/00	Carrington Business Park, Manchester Road	5.80	Greenfield
32020	Former Carrington Power Station, Manchester Road	5.20	Cleared Employment PDL
62017/00	Elsinore Road	4.00	Cleared Employment PDL
70131	Land at Mosley Road	3.70	Uncleared Employment PDL
12015/00	Land at Dairyhouse Lane	3.20	Greenfield
72079/00	Electric Park	2.33	Cleared Employment PDL
32013/03	Former BP Terminal, Manchester Road	2.33	Uncleared Employment PDL
72066/02	Southbank	2.30	Cleared Employment PDL
70129	Land bound by Ashburton Road West	1.88	Cleared Employment PDL
72073/01	Twining Road	1.75	Cleared Employment PDL
72115	Land at Ashburton Road West	1.65	Uncleared Employment PDL
72006/00	Gervin Site, Thompson Road	1.32	Cleared Employment PDL
72103/00	Land at Nash Road (Trinity Business Park)	1.16	Cleared Employment PDL
	Land at Nash Road	1.14	Uncleared Employment PDL
72116	Land adjacent the Bridgewater Canal and MSC	1.13	Cleared Employment PDL
72114	Land at Nash Road	0.95	Uncleared Employment PDL
72117	Phase 2 – Plot 13, Waterside	0.74	Cleared Employment PDL
72118	Land at Nash Road	0.70	Cleared Employment PDL
60027	Northumberland Road	0.68	Cleared Employment PDL
70026	Warren Bruce Road	0.62	Cleared Employment PDL
60012	Former Trafford Press	0.60	Uncleared Employment PDL
10040/00	Former Holts Blends Premises	0.52	Uncleared Employment PDL

Site Ref	Site Name	Site Size (Hectares)	Type of Site
70125	Land west of the Victoria Warehouse	0.40	Uncleared Employment PDL
72119	Land at Nash Road	0.37	Cleared Employment PDL
60022	Warwick Road South	0.36	Uncleared Employment PDL
60021/00	39 Talbot Road	0.35	Uncleared Employment PDL
72101/00	Guiness Circle	0.31	Cleared Employment PDL
10021/00	Bridge Works, Manchester Road	0.30	Uncleared Employment PDL
10046	Hartington House, Hartington Road	0.29	Uncleared Employment PDL
12048	Limberts Transport, Skelton Road	0.28	Uncleared Employment PDL
60020/00	Rear of 464-470 Chester Road	0.25	Uncleared Employment PDL
	TOTAL EMPLOYMENT LAND SUPPLY	**344.69**	

* Denotes allocated sites that were submitted for the Trafford Land Allocations DPD.

6.1.2 'Stand Alone' Sites

In addition to the allocated sites, 7 existing employment sites that are not allocated in the Trafford UDP but have been submitted by developers, landowners and agents as part of the 'Call for Sites' exercise for the Trafford Land Allocations DPD have also been assessed as part of this study. These sites total just over 38ha and each site was submitted for employment use as part of the Trafford Land Allocations DPD.

The sites range in size from almost 0.9ha to 11ha, with four of the sites below 5ha, one site just over 5ha and the remaining two sites being 9.9ha and 10.9 hectares.

Table 17: Summary of 'Stand Alone' Employment Sites Assessed by Trafford Council

Site Ref	Site Name	Site Size (Hectares)	Type of Site
62126	Bakemark UK Site	2.48	Uncleared Employment PDL
72122	Canal side Argos Depot	9.90	Uncleared Employment PDL
72121	Area south of Taylor Road	4.03	Uncleared Employment PDL
72123	Container Base	10.90	Uncleared Employment PDL
72120	The Bridgewater Centre	5.14	Uncleared Employment PDL
12128	Fomer Linotype Works	4.95	Uncleared Employment PDL
12127	Land at Deansgate Lane	0.87	Uncleared Employment PDL
	TOTAL EMPLOYMENT LAND SUPPLY =	**38.27**	

6.2 Site Assessments

6.2.1 Introduction

Assessments were undertaken by Trafford Council in order to assess the quality of the forty nine sites for potential future employment uses. Sites were assessed against twenty four different criteria. These criteria were grouped together into three main categories - Sustainability, Planning Policy and Market Attractiveness – and included a range of criteria:

SUSTAINABILITY CRITERIA

- Location type.
- Suitability for Employment Development - Surrounding Uses and Proximity to Residential Areas and Services.
- Accessibility by public transport.
- Pedestrian and Cycle Access
- Previously Developed land or Greenfield
- Flood Risk
- Environmental Impact

PLANNING POLICY CRITERIA

- Emerging Regional Spatial Strategy and Regional Economic Strategy
- Planning permission status
- Planning policy environmental constraints.
- Strategic Development Sites
- Site within an area for priority regeneration, improvement or protection.
-

MARKET ATTRACTIVENESS CRITERIA

- Availability
- Constraints
- Broadband Access
- Ownership constraints
- Commercial viability
- Road Frontage and Prominence
- Access to Trunk and Primary Road Network
- Proximity to rail freight, sea freight and air freight
- Quality of Surrounding Environment

The scoring approach used is outlined in full in Appendix B.

A summary of the assessment is provided in Section 6.3, highlighting the scores for each site based on the seven categories above.

6.3 Summary of Site Assessments by Scoring Category

6.3.1 Introduction

This section provides a brief overview of the score of the sites assessed for this study by each of the main categories for the site assessments undertaken by Trafford Council and presents a summary table of the sites' scores. In each instance the scoring categories have been split into top, middle and bottom third scores to provide a basic structure for analysis. Please note that the analysis in this section does reflect whether sites have been identified to be retained or released from employment use. This information is presented in Section 7. For full details on details on the assessment of each site please refer to Appendix B.

6.3.2 Total Scores

The total scores are made up of the Sustainability, Planning Policy and Market Attractiveness Scores considered together to provide one overall score. When assessed it was identified that of the total of 49 sites assessed a total of 18 sites covering 56.18ha were in the top third of scoring, 21 sites amounting to a total of 84.06ha were in the middle third of scoring sites and finally 10 sites amounting 242.72 ha fell within the bottom third of sites performing against all three scoring categories used for the assessments.

Table 18: Summary of Total Scores

	Total Number of Sites	Total Area
Top Third	18	56.18
Middle Third	21	84.06
Bottom Third	10	242.72

6.3.3 Sustainability

When assessed against the Policy criteria it was identified that of the total of 49 sites assessed, 27 sites covering 87.91ha were in the top third of scoring, 20 sites amounting to a total of 242.11ha were in the middle third of scoring sites and finally 2 sites amounting 52.94ha were in the bottom third of sites.

Table 19: Summary of Sustainability Scores

	Total Number of Sites	Total Area
Top Third	27	87.91
Middle Third	20	242.11
Bottom Third	2	52.94

6.3.4 Planning Policy

When assessed against the Policy criteria it was identified that of the total of 49 sites assessed, 14 sites covering 28.39 ha were in the top third of scoring, 27 sites amounting to a total of 296.87ha where in the middle third of scoring sites and finally 8 sites amounting 57.7ha were in the bottom third of sites.

Table 20: Summary of Planning Policy Scores

	Total Number of Sites	Total Area
Top Third	14	28.39
Middle Third	27	296.87
Bottom Third	8	57.70

6.3.5 Market Attractiveness

When assessed against the market Attractiveness scores criteria it was identified that of the total of 49 sites assessed, 26 sites covering 157.31 were in the top third of scoring, 18 sites amounting to a total of 221.17ha where in the middle third of scoring sites and finally 5 sites amounting 4.48ha were in the bottom third of sites.

Table 21: Summary of Market Attractiveness Scores

	Total Number of Sites	Total Area
Top Third	26	157.31
Middle Third	18	221.17
Bottom Third	5	4.48

6.4 Strategic Constraints

6.4.1 Introduction

This section summarises a more detailed overview of the main strategic infrastructure issues for Trafford as set out in more detail in Appendix E. This relates to water supply, water treatment, highways infrastructure, telecoms and the electricity and gas network. In obtaining information Trafford Council have consulted with United Utilities, Electricity North West and the Highways Agency. In addition, reference has also been made to the emerging Trafford Local Infrastructure Plan which has, in addition to the consultees already mentioned, involved consultation with British Telecoms and National Grid. Water Supply and Quality

6.4.2 Water Supply and Treatment

Trafford is currently provided with drinking water from major Lake District aqueducts and the Manchester Ring Main. United Utilities have stated that they do not foresee any water provision issues for Trafford and its predicted growth.

In general, it is considered that a more integrated approach to urban drainage is going to be critical for the ability to properly deal with land drainage, flood prevention and sustainable water infrastructure management (water supply and waste water treatment) issues. To ensure that water management and infrastructure requirements are integrated into the development of spatial options and Site Allocations DPDs, United Utilities and the Environment Agency must be involved in early in the process.

- Developments need to drain on a separate system, with only foul drainage connected into the foul sewer. Surface water discharges to the watercourse/ soakaway/ surface water sewer and this may require the consent of the Environment Agency.
- If it is necessary to discharge surface water to the public sewerage system United Utilities may require the flow to be attenuated to a maximum discharge rate determined by United Utilities.
- Despite the challenges they present, key to reducing loads on drainage infrastructure will be the increased use of SUDS.
- To assist the LDF preparation process and to ensure effective implementation of the drainage principles it is recommended that a drainage strategy is developed to ensure that the drainage principles are fulfilled for new development.

6.4.3 Wastewater

Wastewater Treatment Works (WwTW) in Trafford are located at Altrincham, Davyhulme, Partington, Sale, Stretford and Urmston. There are some capacity issues that may be a constraint to the development of employment sites. These are summarised below:

Broad Areas where sites have been identified:

- There are a lot of sewer capacity issues in Altrincham with some very concentrated problem areas. There are also high instances and concentrations of capacity also exist in Hale, West of Old Trafford , Sale, North west of Sale Moor, Sale West, Stretford, West of Urmston and Timperly.
- The current plans for development at the side of the Ship Canal approach the waste water treatment site and therefore the South West extremity of this proposed development should not take place.

Site Specific Issues

- The concern with this site is its proximity to two significant Wastewater Treatment Works. Davyhulme (Manchester's treatment works) WwTW is one of the largest WwTW's in Europe and there has already been investment of £10's of Millions in odour prevention to the benefit of the Trafford Centre and the surrounding population (when Davyhulme was first built in 1894, it was way out of town). The predominant winds across the site are North Westerly and this would be very concerning for a development proposal at Trafford Quays. If the development was allowed to proceed, infrastructure users across the whole region would need to support further investment of more £10's of Millions just so the development could proceed.
- There are no particular issues for Trafford Park although there is an Aqueduct (Manchester Ring Main) and the major (3metres & 4metres diameter) Davyhulme WwTW inlet sewers passing through the area and building is not allowed in their proximity.
- There are some sewer capacity issues towards the West of Urmston.
- In regard to the Shell Carrington site, the drainage of the site is currently dependent on a privately owned pumping station and rising main and the condition of this is unknown. Therefore the potential to drain the site satisfactorily is unknown

6.4.4 Flood Risk

From the site assessments undertaken by Trafford Council flood risk has been identified as a potential constraints for 33 of the 49 sites assessed. These sites amount to approximately 123ha and the food risk is either high (i.e. in Flood Risk Zone 3) or unknown due to the sites proximity to the Manchester Ship Canal and the Bridgewater Canal were Trafford Council is unable to assess because of lack of quantified data on flood risk.

6.4.5 Gas and Electricity Networks

Information received from providers detail that developments in Trafford should not in principle represent a major issue for National Grid's electricity or gas transmission network. The precise nature of the influence of the proposed developments on gas and electricity infrastructure will need to be determined in the first instance via discussion with the relevant gas and electricity Distribution Network Operators (DNOs, National Grid and United Utilities respectively). National Grid will then discuss any requirements for transmission system reinforcement with the DNOs.

6.4.6 Utility Impact Assessment

Trafford Quays has been identified as an area in need of a Utility Impact Assessment, prior to any further development. The assessment may include:

- Electrical Distribution capacity;
- Water Resources capacity;
- Water Treatment capacity;
- Water Supply Distribution capacity;
- Wastewater Network (Sewerage) capacity; and
- Wastewater Treatment capacity.

6.4.7 Highways Infrastructure

Highways infrastructure is potentially a significant constraints to the delivery of development in the borough. A number of reports and studies have concluded that the highway network in the North West is running at, if not above, capacity. The highway network between Altrincham and Lyme and Hale and Alderly edge, in 2006, was operating at 150% (50% extra stress than the normal level). Within Trafford, no routes were seen to be operating under capacity which has an impact on the residents and businesses in the area. If major routes in and out of the area and to major businesses are congested, a negative impact will be felt from loss of revenue. Forecasted levels for 2016 demonstrate that the M6 and the M62 serving the Manchester and Trafford area will be operating at 150% continuously meaning implications for businesses and residents who use that route. Forecasted levels for 2026 demonstrate the same increase in stress, with more of the major motorway routes operating at over capacity. However a Route Management Strategy has been developed for the M57/M58/A5035 to M6 to Liverpool and M62 which aims to develop a strategic approach to the maintenance, operation and improvement of the highway network which should ensure that the motorway networks that serve Trafford operate efficiently.

Public transport infrastructure improvements will be critical to the sustainability of future employment sites; this is particularly relevant to Trafford Park, where public transport improvements were seen as a key issue for attracting and retaining businesses and employees.

6.5 Conclusions

As discussed in Section 4, it is recognised in government guidance[5] that employment land supply in some urban local authority areas is likely to come through the recycling of land that was previously in employment use and/ or from the intensification of uses. Consequently for Trafford the supply is likely to include previous and existing employment sites. These are vacant/ derelict sites that are identified as being ‘cleared’ and ‘uncleared’ in the site assessments undertaken by Trafford Council.. However, in addition to the vacant/ derelict ‘cleared’ and ‘uncleared’ sites there are also a number of ‘uncleared’ sites that are currently in employment use that Trafford Council also consider will come forward to contribute to the future supply of land over LDF the plan period.

Following analysis of the site assessment undertaken by Trafford Council, sites have been assessed to establish the degree they can be considered as part of the available employment land supply. From this analysis it is considered that sites identified as being ‘cleared’ or ‘uncleared’ that are not currently occupied cannot be regarded as being available. However, continued monitoring of the vacancy/ occupation levels of sites and premises should be periodically undertaken to ensure there is consistent and accurate understanding of the supply from previous and existing employment sites.

5 ODPM, Employment Land Reviews: Guidance Note (December 2004), paragraph 6.20

7 Matching Demand with Supply

7.1 Introduction

This section sets out the results from bringing together the demand and supply analysis and helps to inform the key issues Trafford Council will need to consider and consult upon in preparing the LDF.

This study has examined both the projected demand for future employment land in Trafford to 2026 and the suitability of the existing and potential supply of employment land to meet this demand. Specifically, the demand assessment has included a review of different demand scenarios including models based on historic take up rates and projected employment trends incorporating the OEF Greater Manchester Forecasting Model employee projections. In addition, we have also used a qualitative market overview of Trafford and used this and the views of stakeholders to identify the demand for employment land in Trafford through to 2026.

Ultimately it will be the LDF preparation process (informed by the LDF evidence base of which this study is part) that should be used to determine the extent of the land requirements for the borough. This will also be informed by a range of issues that are yet to be fully understood and determined. These issues include:

- the nature and disaggregation of the Greater Manchester's sub regional land requirements;
- the capacity of other Greater Manchester districts in terms of employment land availability; and
- the needs of existing businesses to relocate into more suitable premises to meet modern business needs etc.

It is recommended that these issues should be considered as part of the LDF preparation in determining how much land should be allocated and should also be considered along with other evidence such as studies that address housing, open space needs, flood risk and retail capacity etc.

In addition this section sets out the findings from the supply assessments, which featured a detailed appraisal of 49 sites including 42 Existing Allocated Employment Sites identified in Trafford's UDP and 7 employment sites that are not allocated in the development plan.

7.2 Estimating the Gross Employment Land Requirements for Trafford Council

Section 4 set out different scenarios to identify the gross employment land requirement for Trafford to 2026. The section explores the difficulties involved in translating net employment land projections into a form suitable for translating into gross land requirements, and the difficulties in arriving at a single figure that could inform Trafford Council's allocations for employment development, but other land uses also through the LDF process.

Section 5 concluded that there will be gross demand for employment land in Trafford between 2007 and 2026 of **100ha** to **170ha** amounting to **5.3ha** to **8.9ha** being required each year.

7.3 Supply of Current and Potential Employment Sites

This section presents the findings of the site appraisal process undertaken by Trafford Council to determine the suitability of existing and potential sites for employment uses. It presents which sites Trafford Council believe should be considered for retention or release from employment use. In considering the potential supply of employment land to meet demand, Trafford Council has carried out a detailed assessment of 49 sites across the district.

The sites total almost 383ha. Of this total, 27 sites covering a total of 115.5ha are included in Trafford Council's Employment Land Schedule and 22 sites covering 277.5ha have come from other sources such as the Council's LDF consultation. The full results of Trafford Council's assessment are presented in Section 6 and Appendices C and D.

7.4 Matching Supply with Demand

The projected demand for employment land in Trafford between 2007 and 2026 amounts to a range between **100ha** to **170ha** amounting to **5.3ha** – **8.9ha** per year. At the start of the study Trafford had identified that there was 122ha of available employment land that was largely made up of previous or existing employment sites. Following the completion of the site assessment it has been identified that there are some changes to this supply to consider. This is discussed in detail in Sections 7.4.1 – 7.4.3. In addition, please note that as stated in Section 3.5 the status of sites may have changed since the site assessment work was undertaken during 2007 and 2008 and therefore additional sites may have come forward since then that have not been included in the study.

7.5 Employment Sites to be Retained and Available

Of the 49 sites assessed by Trafford Council a total of 31 sites amounting to almost **185ha** of land should be retained for employment uses and form part of Trafford's future supply as they are not in active employment use. Based on this available supply it is clear that Trafford has adequate supply to meet its demand requirements up to 2026 and potential has an oversupply of approximately 15ha.

In addition it should also be noted that this supply of available land identified by Trafford Council does not include **9.6ha** of land that his currently under construction for employment uses and consequently when this land is considered the supply increases to almost **195ha**.

Table 22: Employment Sites Identified to be Retained and Available as Part of the Employment Land Supply following Assessment by Trafford Council

Site Ref	Site Name	Area	Type of Site	Status
70125	Land west of the Victoria Warehouse	0.4	Cleared Employment PDL	Retain
72066/02	Southbank	2.3	Cleared Employment PDL	Retain
70026	Warren Bruce Road	0.62	Cleared Employment PDL	Retain
72079/00	Electric Park	2.33	Cleared Employment PDL	Retain
72117	Phase 2 – Plot 13, Waterside	0.74	Cleared Employment PDL	Retain
62017/00	Elsinore Road	4	Cleared Employment PDL	Retain
70129	Land bound by Ashburton Road West	1.88	Cleared Employment PDL	Retain
72073/01	Twining Road	1.75	Cleared Employment PDL	Retain
72103/00	Land at Nash Road (Trinity Business Park)	1.16	Cleared Employment PDL	Retain
32013/04	Former BP Terminal, Manchester Road	26	Cleared Employment PDL	Retain
72101/00	Guiness Circle	0.31	Cleared Employment PDL	Retain
72116	Land adjacent the Bridgewater Canal and MSC	1.13	Cleared Employment PDL	Retain
72118	Land at Nash Road	0.7	Cleared Employment PDL	Retain
72114	Land at Nash Road	0.95	Cleared Employment PDL	Retain
72119	Land at Nash Road	0.37	Cleared Employment PDL	Retain
72006/00	Gervin Site, Thompson Road	1.32	Cleared Employment PDL	Retain

Site Ref	Site Name	Area	Type of Site	Status
60021/00	39 Talbot Road	0.35	Uncleared Employment PDL	Retain
70025	Victoria Warehouse	1.03	Uncleared Employment PDL	Retain
62126	Bakemark UK Site	2.48	Uncleared Employment PDL	Retain
70131	Land at Mosley Road	3.7	Uncleared Employment PDL	Retain
60022	Warwick Road South	0.36	Uncleared Employment PDL	Retain
72094/00	Former Kratos Site	3.6	Uncleared Employment PDL	Retain
72122	Canal side Argos Depot	2.36	Uncleared Employment PDL	Retain
10039/00	Bayer site, Manchester Road	1.72	Uncleared Employment PDL	Retain
32013/03	Former BP Terminal, Manchester Road	2.33	Uncleared Employment PDL	Retain
72113	Land at Nash Road	1.14	Uncleared Employment PDL	Retain
10133	Altair	1	Uncleared Employment PDL	Retain
32019/00	Former Gas Works Site, Manchester Road	27.6	Uncleared Employment PDL	Retain
32020	Former Carrington Power Station, Manchester Road	5.2	Cleared Employment PDL	Retain
32012/01	Former Powergen Site – Phase 1, Carrington North	16.54	Cleared Employment PDL	Retain
32132	Land at Carrington A	69.3	Uncleared Employment PDL	Retain
	Total Area	**184.67**		

7.5.1 Sites with Planning Permission for Mixed Use Development

Of all the sites assessed four sites amounting to around 6ha were identified to have planning permission for non employment uses or mixed use schemes with some including and element of employment development. The sites include two sites that are available and form part of the employment supply. These sites are:

- Site 70131 ‘Land at Mosley Road’ (3.7ha) which is subject to a mixed use permission;
- Site 70025 ‘Victoria Warehouse’ (1.03ha) which is subject to a mixed use permission including 15,369 sq m of B1 development;

The remaining two sites are identified by Trafford Council as being retained for employment use, but are not available and do not form part of the supply. These sites are:

- Site 60027 ‘Northumberland Road’ (0.68ha) is subject to a mixed use residential and commercial/ leisure scheme.
- Site 60012 ‘Former Trafford Press’ (0.6ha) is subject to a mixed use residential led scheme.

Based on the assessment undertaken by Trafford Council and taking pipeline developments into account Trafford it is reasonable to assume that the supply of available employment sites could be reduced by up to **4.73ha**. This would result in a revised total of around **190ha**, however this would still result in Trafford having an adequate supply to meet its anticipated demand.

7.6 Employment Sites to be Retained or considered for Mixed Use Development but are not Available

A total of 19 sites amounting to around 99ha have been identified to be retained for employment uses or mixed use development. However each of these sites have been identified has being in active employment use and therefore are not available and cannot be included as part of Trafford’s employment land supply.

Of the 19 sites, 3 sites totalling 6.05ha were identified as sites that should be considered for mixed use development. Of these sites, two are currently allocated in the Trafford UDP for employment uses. The sites include:

- Site 10021/00 'Bridge Works, Manchester Road' and amounts to 0.3ha. The site is currently allocated for mixed use in the Trafford UDP.
- Site 12020/00 'Land at Craven Road' is 0.8ha in size and is currently cleared and available for development. However, the site currently has a planning permission for housing and should be removed from the future supply.
- Site 12128 'Former Linotype Works' which amounts to 4.95ha and has been identified to be considered for part retention for employment uses.

Table 23: Employment Sites Identified to be Retained or Considered for Mixed Use Development but do not form par of the Employment Land Supply Following Assessment by Trafford Council

Site Ref	Site Name	Area	Type of Site	Status
32005/00	Carrington Business Park, Manchester Road	5.8	Greenfield	Retain
32008/00	Shell Chemical Works, Carrington North	4.5	Greenfield	Retain
10133	Altair	1.99	Uncleared Employment PDL	Retain
60012	Former Trafford Press	0.6	Uncleared Employment PDL	Retain
72122	Canal side Argos Depot	7.54	Uncleared Employment PDL	Retain
60020/00	Rear of 464-470 Chester Road	0.25	Uncleared Employment PDL	Retain
72123	Container Base	10.9	Uncleared Employment PDL	Retain
72121	Area south of Taylor Road	4.03	Uncleared Employment PDL	Retain
72120	The Bridgewater Centre	5.14	Uncleared Employment PDL	Retain
10046	Hartington House, Hartington Road	0.29	Uncleared Employment PDL	Retain
12048	Limberts Transport, Skelton Road	0.28	Uncleared Employment PDL	Retain
12127	Land at Deansgate Lane	0.87	Uncleared Employment PDL	Retain
10021/00	Bridge Works, Manchester Road	0.3	Uncleared Employment PDL	Mixed Use
12128	Fomer Linotype Works	4.95	Uncleared Employment PDL	Mixed Use
12020/00	Land at Craven Road	0.8	Cleared Employment PDL	Mixed Use
60027	Northumberland Road	0.68	Cleared Employment PDL	Retain
10040/00	Former Holts Blends Premises	0.52	Uncleared Employment PDL	Retain
72115	Land at Ashburton Road West	1.65	Uncleared Employment PDL	Retain
32132	Land at Carrington B	48	Uncleared Employment PDL	Retain
	Total Area	**99.09**		

7.7 Employment Sites Identified to be Removed from the Employment Land Supply Following Assessment by Trafford Council

Of the 49 sites assessed by Trafford Council, 3 sites totalling 99.2ha have been identified to be considered for release from employment uses. The largest site is 32132 'Land at Carrington C' which amounts to 59.6ha. The site is to be removed due to it being Greenfield and allocated as C8 'Countryside' Land in the Trafford UDP. The second largest site is 42002/00 'Davenport Green' amounting to 36.4ha followed by site 12015/00 'Land at Dairyhouse Lane' which totals 3.2ha (this site is constrained by its status as a Greenfield site, and the unwillingness of the landowner to consider the site for development).

Table 24: Employment Sites Identified to be removed from the Employment Land Supply Following Assessment by Trafford Council

Site Ref	Site Name	Area	Type of Site	Status
32132	Land at Carrington C	59.6	C8 Land	Release
12015/00	Land at Dairyhouse Lane	3.2	Greenfield	Release
42002/00	Davenport Green	36.4	Greenfield	Release
	Total Area	**99.2**		

7.8 Conclusions

7.8.1 Introduction

This section presents the summary of findings following the analysis of the supply based on the site assessments undertaken by Trafford Council and the projected demand for employment land by Arup and Lambert Smith Hampton. The section identifies the additional land that will be required between 2007 – 2026 and whether the supply will meet that demand. In addition, the section also sets out some additional factors that will need to be considered by Trafford Council when considering employment land requirements as part of the LDF preparation process.

7.8.2 Supply and Demand

As discussed in Sections 4, 5 and 6 Trafford's future gross land demand requirement during 2007 – 2026 is a range between **100ha** to **170ha** amounting to **5.3ha** to **8.9ha** each year. However this demand range does not include a margin of choice and therefore it will be important that Trafford Council monitors its land to throughout the plan period to ensure that the supply meets demand

Based on the analysis of the supply Trafford has a maximum of almost **185ha** increasing to almost **195ha** when the 9.6ha of land currently under construction for employment uses is included. However, from the assessment work there is also potential for around 5ha to be lost for other uses which reduce Trafford's supply to around **190ha**; however this would still result in Trafford having a supply of available land that goes beyond the demand requirements.

Based on these scenarios it is reasonable to conclude that Trafford has sufficient land supply to meet its project employment land demand requirements up to 2026. .

It is also recognised that Trafford Council consider that there will be additional employment land that is currently in use that could contribute to the future supply of land and meets its objectives to focus new employment development on sites that are in previous or current employment use. However this land is currently in occupation and therefore cannot be regarded as available and part of the current supply.

8 Recommendations

8.1 Introduction

Taking into account the various issues and considerations raised in this Employment Land Study, we have prepared a series of recommendations.

These recommendations are not exhaustive and should be considered together with other evidence (i.e. Strategic Housing Land Availability Assessments (SHLAA) Open Needs Assessment, Strategic Flood Risk Assessment (SFRA) and Retail Capacity Studies) in order to identify the full extent of the spatial implications facing the borough through the preparation of the LDF.

This section provides summaries of the key issues and messages that will need to be considered and used to inform the preparation of the LDF. These issues include:

- Total Supply over the Plan Period
- Location Issues for Employment Uses
- Rolling Provision and Phased Release of Land
- The Recycling/ Churn of Employment Land in Trafford and the Implications of Displacement
- The Need for Mixed Use Development
- Provision of Sites and Premises for SMEs, Indigenous Business and low Amenity uses
- Review of Greenbelt and Protected Open Land Boundaries/ Mixed Use Development
- Strategic Constraints
- Meeting Local, Sub-Regional and Regional Employment Land Needs
- Local Employment Densities and Plot Ratios
- Other Factors Potentially Affecting Employment Land Demand and Supply
- Approach to Monitoring

In considering these issues in the LDF, it will be important to explore interrelationships and develop options that are flexible enough to adapt to change.

8.2 Total Supply over the Plan Period

This section summarises the findings from Sections 4, 5, 6 and 7 and provides the recommended employment land requirement for the LDF plan period. Trafford Council should use the findings of the report to inform consultations on the preparation of the Core Strategy, Allocations DPD and Local Infrastructure Plan. It is recognised that in determining the amount of land required in the borough a number of emerging issues will need to be taken into consideration which could affect the amount of land required for employment uses in Trafford. The issues include:

- the nature and disaggregation of the Greater Manchester's sub regional land requirements;
- the capacity of other Greater Manchester districts in terms of employment land availability also considering the implications of 'landless growth';
- proportions of mixed use development on employment sites; and
- increased employment land losses to non employment uses.

As discussed in Sections 4, 5 and 6 a range of **100ha** to **170ha** amounting to **5.3ha** to **8.9ha** each year is likely to be required in Trafford up to 2026. However this demand range does not include a margin of choice and therefore it will be important that Trafford Council monitors its land throughout the plan period to ensure that the supply meets demand

Based on the analysis of the supply Trafford has at least **185ha** increasing to almost **195ha** when the 9.6ha of land currently under construction for employment uses is included. Based on these scenarios it is reasonable to conclude that Trafford has sufficient land supply to meet its projected employment land demand requirements up to 2026.

In considering the future supply of land Trafford Council considers that its existing employment sites are likely to meet future supply through the recycling and intensification of uses. This issue is discussed in detail in Sections 4 and 5 and identifies that at present only sites that are/ have been in previous employment use and are vacant/ unoccupied can be considered as part of the supply. In addition to this land, Trafford Council also consider that sites that are currently in employment use that have been subject the site assessments will also form part of the future supply. However, for this land to be considered as part of the supply Trafford Council should consider undertaking further research that investigates concepts such as 'landless growth' and the implications of displacement on additional land requirements.

8.3 Location Issues for Employment Uses

A key issue for Trafford will be the geographical distribution of sites and premises across the borough. This is a critical issue for the LDF to consider when considering the future employment allocations and subsequent retention and release of employment sites. It will be essential for the LDF to fully explore the need for a balanced 'spread' of land and premises that meet different business needs and provide good accessibility to employment opportunities for communities with different levels of skills and training.

8.4 Rolling Provision and Phased Release of Land

This section outlines the key issues for considering timely land availability and phasing of land in order to meet the short, medium and long term business needs of the borough.

A key test for the robustness of the LDF is deliverability and therefore it is important for Trafford Council to ensure it has an adequate supply of land immediately available for development, as well as ensuring enough land is allocated for the whole plan period. In particular, there will be a need to explore spatial options that address the short, medium and long term employment land demands and whether Trafford has the sites to meet these needs in a timely way.

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

8.5 The Recycling/ Churn of Employment Land in Trafford and the Implications of Displacement

This section builds on the discussions in Section 5 and 8.5 and looks at the issues of recycling and 'churn' of existing employment land in Trafford and the implications this has on employment land demand and supply.

Government guidance[6] identifies that a significant amount of employment land supply in urban local authority areas is likely to come through the recycling of land that was previously in employment use or from intensification of uses.

[6] ODPM, Employment Land Reviews: Guidance Note (December 2004), paragraph 6.20

Trafford Council consider that in addition to the identified supply of available land, further sites that were in previous or existing employment use will form part of the future supply through recycling and/or reconfiguration/ intensification of uses. A key issue when considering the recycling or 'churn' of existing employment land to meet demand is the impact this has on the displacement of existing businesses that are located in these areas/ sites. There is currently limited information on where displaced businesses relocate to (i.e. there is a need to establish what proportion of businesses relocate to another part of the same employment area/ site, re-locate in the Trafford Borough, re-locate to another neighbouring districts or cease operation altogether). Consequently, it is not possible to identify the implications on additional land requirements and therefore not possible to include sites that are currently occupied for employment uses as part of the supply.

In order to build the case for including such sites Trafford Council may wish to consider additional research on displacement and its implications on additional land requirements, the reconfiguration intensification of existing employment sites and concepts such as 'landless growth.

8.6 The Need for Mixed Use Development

As discussed in Section 2.4, Draft PPS 4 places particular emphasis on mixed use development to achieve sustainable economic growth. This section outlines the main issues emerging from consultation with stakeholders and how the LDF will need to consider other forms of development when allocating future employment land.

As discussed in Section 5.8.3, in broad terms, it is considered that the majority of the sites require mixed use development to make them commercially viable. However, the mix of uses on employment sites was considered to be critical when considering the range and choice of land needed to meet employment demand and that sites should be allocated with a view to ensuring that land is provided to accommodate ancillary uses that improve the viability and sustainability of developments. We therefore recommended that Trafford Council give careful consideration to the need for mixed use schemes on sites identified in this study and where mixed use is identified to be the most appropriate form of development that full consideration is given to ensuring they are 'employment led' mixed use schemes.

8.7 Provision of Sites and Premises for SMEs, Indigenous Business and low Amenity uses

A key issue arising from consultation with stakeholders is the perceived lack of choice and range of land and premises for SMEs and small indigenous businesses in Trafford. Some stakeholders viewed that market forces are causing displacement of businesses with limited opportunities for businesses to relocate within the borough. It was noted that where land is identified for such development it often has constraints which have implications for the commercial viability of the site. Trafford Council recognises this issue, however, considers this may be the result of greater instances of enquiries due to the greater number of small companies compared to larger business (i.e. over 90% of businesses employ fewer than 25; 95% employ fewer than 50). The Council have identified over 10,000 SMEs located in Trafford demonstrating that the borough has a significant number of these businesses. It is recommended that monitoring of SME enquiries is continued to provide a greater understanding of whether market failure exists and compare this to qualitative information from stakeholders.

In addition, low amenity uses were also a key issue and it was widely recognised that these uses are a fundamental part of any local economy despite the noise, air and land pollution issues often associated with their operation. It will therefore be important for Trafford Council to give full consideration towards the supply of suitable land and premises for these uses as it is essential that the borough provides a supply that meets the needs of a full range of business needs. In considering this, Trafford Council should also consider the degree to which public sector intervention may be required to implement development so that Trafford avoids market failure in meeting the needs of these bussiness sectors.

8.8 Review of Greenbelt and Protected Open Land Boundaries/ Mixed Use Development

The impact on Trafford's Green Belt and Protected Open Land from development will be a key issue for the LDF. This section sets out some of the key issues and potential options that could be considered during the preparation process.

A key site put forward by developers in Trafford is Davenport Green which is located within the Green Belt and performs poorly in planning policy and sustainability terms from the site assessment undertaken by Trafford Council. Based on the site assessments Trafford Council considers that this land should be released from its current, allocated employment use.

The issue of displacement of existing employment uses and loss of employment land to alternative uses (as discussed in Sections 5, 8.4 and 8.5) may also have implications for the amount of land required to meet demand for employment uses. The LDF should consider the need for a balanced geographic 'spread' of sites across the borough and addressing the potential need for additional land to meet the needs of SMEs, indigenous businesses and low amenity uses.

One of the key issues for Trafford Council to consider as part of the LDF preparation process will be the strategic policy approach regarding the level of protection afforded to Trafford's existing employment land allocations. In particular with regards to the implications this may have on increasing development pressure on Green Belt and areas of Protected Open Land.

Consequently, it is recommended that options are considered by Trafford Council through the LDF preparation process regarding this issue. It is noted that with regard to this, the protection of employment land allocation would not, in isolation, necessarily result in a reduction in development pressure on Green Belt and areas of Protected Open Land. Therefore the outcomes of other evidence base studies for other land uses, in particular the Strategic Housing Land Availability Assessment (SHLAA) and other studies such as the Greater Manchester Strategic Flood Risk Assessment (SFRA) will be key considerations in determining the policy approaches adopted in the LDF in addressing various land use demands in a sustainable manner.

8.9 Strategic Constraints

In considering strategic constraints the following issues should be considered when developing the LDF:

- There is currently a significant amount of employment land (that was assessed as part of this study) that is identified to be subject to high or unknown flood risk. Consequently it will be important to ensure that all forms of flood risk are considered when allocating sites including surface water and ground water etc and that emerging documents such as the Greater Manchester Strategic Flood Risk Assessment and the emerging South Manchester Flood Risk Management Strategy are used to identify the degree and type of flood risk, the potential solutions for effective flood management and the likely costs and funding sources required.
- Specific consideration should be given to public transport improvements in Trafford, particularly in existing employment areas and large site such as Trafford Park were it has been identified that a lack of public transport is a constraint to attracting and retaining employers and employees.

In addition to some general issues to be considered in relation to infrastructure improvements and capacity include the need to:

- Ensure there is early engagement and ongoing dialogue with utilities providers and the Highways Agency.
- Consider employment requirements together with residential needs when considering utilities infrastructure capacity for the LDF and relevant evidence base studies.
- Ensure that environmental impacts such as flood risk and water quality are given full regard for future infrastructure improvement considerations.
- Consider developing a three tier approach to future water and sewerage capacity issues that covers foul sewerage, sewerage treatment and water networks.
- Give full regard to the need to align the phasing of development sites with utility providers Asset Management Plans which operate in periodic cycles (often every 5 years).

8.10 Meeting Local, Sub-Regional and Regional Employment Land Needs

The issue of sub regional and regional demand for employment land is a key issue for Trafford's LDF to address. To date issues regarding the nature of the demand and how the employment land requirement (as set out in the RSS) for Greater Manchester is disaggregated between the 10 Greater Manchester districts is still to be determined and agreed. This section summarises the key issues for consideration.

Trafford's supply is likely to meet the anticipated local demand for employment land up to 2026. However there are a number of critical issues that will need to be considered in identifying new sites to meet the anticipated demand.

A key issue is the need to fully understand the extent to which existing sites, particularly Trafford Park, will be able to accommodate future employment land demand during the plan period and to what extent this will help meet the potential employment land demand requirements. From the discussions with stakeholders and Trafford Council it is anticipated that in the short to medium term the majority employment development will be focused on land that is/ has already been in employment use. Therefore it is likely that there will be limited need for new employment land to be identified during this time; however, a key issue will be the need to fully understand the level of displacement due to new development resulting in other, existing uses having to relocate. In the long term it is anticipated that the recycling of land may begin to decline as less land becomes available and therefore there may be a need for new land to be allocated to meet demand. Consequently, Trafford Council may need to identify and assess new sites to see if there is suitable additional land to meet the demand.

In considering this, Trafford Council should continue working and developing relationships with neighbouring local authorities to understand the extent of local demand, in particular the outcomes of Employment Land Studies for Manchester, Salford and other relevant local authorities in Greater Manchester will be critical in understanding the interrelationships and cross boundary implications of employment land supply. This will be particularly important should Trafford Council or the local authorities of Manchester and Salford identify that it is unlikely that there will be enough new sites to meet anticipated demand in the future. The Council should also consider working with the Association of Greater Manchester Authorities (AGMA) and with the Northwest Development Agency (NWDA) (see Section 5.7) to understand the nature of sub-regional and regional employment land requirements and how sites such as Trafford Park and other strategic sites (of sub regional and regional significance) in neighbouring districts will meet the sub regional employment land requirements of 917 hectares as set out in the North West RSS (see Section 2.5).

8.11 Local Employment Densities and Plot Ratios

As part of regular discussions with local employers, Trafford Council may wish to try and better understand local employment densities and plot ratios, to enable more accurate updates of this work in the future. The issue of increased densities is discussed in Section 5 and suggests that increased employment densities should not be restricted to B1 (office) development and could be considered for other B Class uses such as B8 (storage and distribution).

In addition, there may also be opportunities to explore increased densities for already high density uses (i.e. B1 (office)) as the conversion of floorspace requirements for office developments into gross land requirements through standard plot ratios may underestimate the increased density of office development at locations like Trafford Park, Altrincham and Sale where higher plot ratios are the standard.

This issue will also be a key issue for Trafford Council to develop a greater understanding on the impacts this has on the employment land supply in the Borough over the plan period and has clear synergies with the capacity of sites such as Trafford park meeting demand through the recycling of existing employment land.

8.12 Other Factors Potentially Affecting Employment Land Demand and Supply

There are a number of factors that are yet to be fully determined that are likely to have implications on the type, scale and location of employment land in Trafford. This includes:

- the nature and disaggregation of Greater Manchester’s sub regional land requirements as set out in the North West RSS;
- the capacity of other Greater Manchester districts in terms of employment land availability, particularly the impacts of concepts such as ‘landless’ growth the City Region;
- the needs of existing businesses to relocate into more suitable premises to meet modern business needs;
- any ‘domino’ effects of businesses relocating (freeing up existing sites for other firms to occupy);
- issues of displacement of business whereby market forces result in smaller businesses and low amenity businesses being replaced by larger and more modern businesses; and
- the loss of existing employment land to other uses and whether the rate of this is likely to continue, particularly in the context of an economic downturn.

It is recommended that these issues should be considered as part of the LDF preparation in determining how much and which land should be allocated for employment uses.

8.13 Approach to Monitoring

This section provides a series of recommendations that Trafford Council should consider in developing a greater understanding of employment land demand and supply issues through the development of monitoring frameworks.

Generally Trafford Council’s approach to monitoring is very robust and detailed and the Council should continue to monitor core indictors to the same level of detail for the Annual Monitoring Report (AMR). However in undertaking this study there have been a number of areas where further development of the monitoring framework will be beneficial in developing a more comprehensive understanding of employment land demand, supply and losses, as well as the interrelationships with other competing land uses. These include:

Monitoring for the recycling of existing employment land

This element of monitoring is considered to be critical in Trafford gaining a greater understanding of the impacts on employment land demand in the Borough. To achieve this we recommend that Trafford consider sub dividing and zoning large sites such as Trafford Park and Carrington and monitoring sites using GIS. Monitoring frameworks should then be developed to provide site specific information on the amount of land and premises that are vacant to establish a greater understanding of what land can be included as part of the future supply. Future monitoring should continue to record the rate of land take up, the mix of uses and plot ratios and densities of developments to provide indications of the amount of employment generating floorspace and to establish how many people are being employed in a defined area. Further information could also be monitored on vacancy rates and numbers of business enquiries for land and premises to identify areas of potential market failure. These monitoring approaches are discussed in more detail below:

Monitoring of displacement

Monitoring of displacement is a key area where we recommend that specific focus is given and that Trafford Council develops a monitoring framework that measures the impact on existing businesses when the land and premises they are located on is identified to be developed for an alternative use and the implications this may have on additional land requirements. We also consider there is scope for the monitoring framework to be developed at sub regional levels to take account of any neighbouring local authorities and cross boundary movements of businesses.

Monitoring of density and plot ratios

As stated in the qualitative consultation, stakeholders identified that there is a likelihood that employment development will increase in density and ensure that more jobs can be provided on less land. This is usually with regards to B1 (office) development, however there are emerging examples that uses such as B8 (storage and distribution) will also be developed at higher densities. Consequently, there are opportunities for Trafford Council to build on the monitoring of floorspace developed and identify the number of people employed in those premises to establish a greater understanding of the employment generating floor space that can be achieved through different development densities.

Monitoring of SMEs, indigenous businesses and low amenity uses

Following the issues raised by stakeholders regarding SME, small indigenous businesses and low amenity uses it is recommended that Trafford Council develop a monitoring framework that ensures there is a robust understanding of local business needs and requirements for land and premises. In identifying suitable land and premises, a key issue will be the level of public sector intervention needed to deliver development. In addition, there will also be merit in considering the business growth and expansion requirements of such businesses and to develop approaches that can help facilitate the transition of growth.

Appendix A

Economic Statistics

A1 Economic Statistics

A1.1 Employment

Source: Annual Business Inquiry rounded for confidentiality, Crown Copyright, from Nomis 30.4.08 and Trafford Council Economic Development Department analysis

Except Occupational Breakdown of the Labour Force:

Source: Annual Population Survey Workplace Analysis, Crown Copyright, from Nomis 6.5.08

Number and Percentage of Firms by Employment Size Band 2006

	Total	1-4 employees	5-10 employees	11-24 employees	25-49 employees	50-99 employees	100-199 employees	200+ employees
England	2,074,700	1,474,900	280,500	168,700	78,300	40,300	18,300	13,600
		71%	14%	8.1%	3.8%	1.9%	0.9%	0.7%
North West	247,000	167,900	36,500	22,000	10,800	5,500	2,500	1,800
		68%	15%	8.9%	4.4%	2.2%	1.0%	0.7%
Greater Manchester	92,500	62,900	13,500	8,000	4,200	2,200	1,000	700
		68%	15%	8.6%	4.6%	2.4%	1.0%	0.8%
Trafford	10,900	7,600	1,400	900	500	300	100	100
		70%	13%	8.2%	4.3%	2.5%	0.8%	0.8%

Employment by Significant Industrial Sector, Trafford 1997-2006

	1998	1999	2000	2001	2002	2003	2004	2005	2006	Change 1998-2006
Manufacturing	17,800	18,800	18,400	17,600	15,800	15,300	14,000	13,300	12,700	-5,100
Construction	6,600	5,300	4,500	6,800	6,900	6,300	8,000	7,800	7,600	1,000
Distribution & Wholesale	11,100	11,300	11,100	11,300	11,300	9,600	9,800	10,000	9,500	-1,600
Transport, storage & communication	9,600	8,800	9,200	10,100	10,800	9,200	9,000	7,900	7,800	-1,800
Hotels and restaurants	5,400	6,400	6,400	6,700	6,600	6,800	5,800	5,800	6,300	900
Retail trade	10,600	12,800	13,300	13,600	14,400	15,100	16,200	15,500	15,600	5,000
Financial intermediation	3,400	3,400	2,900	3,200	3,100	3,600	5,300	4,600	4,600	1,200
Business & Professional Services	26,700	30,600	28,700	30,700	31,000	35,600	36,200	33,400	34,800	8,100
Public administration	3,700	5,100	4,600	4,400	4,600	5,000	4,600	4,800	4,800	1,100
Education	5,700	5,700	7,100	6,600	6,500	7,000	6,700	5,900	5,600	-100
Health and social work	8,100	8,600	8,700	9,600	8,700	8,500	8,700	8,000	8,200	100
Community, social & personal services	4,000	5,100	4,900	5,300	5,400	6,100	6,300	6,100	5,900	1,900
Total	113,800	123,000	121,400	126,900	125,700	128,400	134,300	123,100	123,800	10,000

Employment by Industrial Sector 2006

	England		North West		Greater Manchester		Trafford	
	Employees	% of Workforce	Employees	% of Workforce	Employees	% of Workforce	Employees	% of Workforce
Agriculture	175,700	1%	14,800	0%	800	0%	100	0%
Fishing	1,400	0%	100	0%	0	0%	0	0%
Mining and quarrying	28,800	0%	2,100	0%	200	0%	0	0%
Manufacturing	2,481,100	11%	377,100	13%	131,900	11%	12,700	10%
Energy Supply	83,700	0%	8,200	0%	1,600	0%	200	0%
Construction	1,056,400	5%	149,900	5%	61,600	5%	7,600	6%
Wholesale and retail trade	3,857,300	17%	510,300	17%	200,600	17%	25,100	20%
Hotels and restaurants	1,528,100	7%	210,100	7%	70,000	6%	6,300	5%
Transport, storage and communications	1,378,100	6%	181,100	6%	80,100	7%	7,800	6%
Financial intermediation	912,700	4%	103,400	3%	46,600	4%	4,600	4%
Business & Professional Services	4,076,600	18%	474,800	16%	210,800	18%	34,800	28%
Public Admin	1,216,100	5%	169,600	6%	57,200	5%	4,800	4%
Education	2,097,500	9%	283,900	9%	108,400	9%	5,600	5%
Health & Social Work	2,675,700	12%	383,100	13%	135,300	12%	8,200	7%
Community, Social, Personal Service	1,197,200	5%	142,200	5%	54,200	5%	5,900	5%

Total	22,766,600		3,010,700		1,159,100		123,800	

Change in Employment by Industrial Sector, 1998-2006

	England		North West		Greater Manchester		Trafford	
	Change 1998-2006	% change	Change 1998-2006	% change	Change 1998-2006	% change	Change 1998-2006	% change
Agriculture	-41,800	-19%	-4,800	-24%	-1,000	-56%	0	0%
Fishing	-4,100	-75%	-200	-67%	0	0%	0	0%
Mining and quarrying	-13,200	-31%	-100	-5%	-100	-33%	0	0%
Manufacturing	-1,023,600	-29%	-152,700	-29%	-62,600	-32%	-5,100	-29%
Energy Supply	-23,300	-22%	-5,300	-39%	-4,400	-73%	-700	-78%
Construction	140,100	15%	23,600	19%	6,500	12%	1,000	15%
Wholesale and retail trade	39,300	1%	-3,000	-1%	0	0%	3,400	16%
Hotels and restaurants	190,200	14%	22,500	12%	9,200	15%	900	17%
Transport, storage and communications	119,000	9%	22,700	14%	12,200	18%	-1,800	-19%
Financial intermediation	-10,800	-1%	11,100	12%	6,400	16%	1,100	32%
Business & Professional Services	921,000	29%	132,900	39%	62,000	42%	8,100	30%
Public Admin	88,600	8%	11,200	7%	4,000	8%	1,100	30%
Education	465,500	29%	59,300	26%	14,300	15%	0	0%

Health & Social Work	546,800	26%	79,700	26%	27,800	26%	200	2%
Community, Social, Personal Service	217,900	22%	25,200	22%	12,700	31%	1,900	48%
Total	1,611,600	8%	222,200	8%	87,000	8%	10,000	9%

Occupational Breakdown of the Labour Force

% all in employment in workforce who are:	England	North West	Greater Manchester	Trafford
1: managers and senior officials	15.8	14.0	15.1	19.1
2: professional occupations	13.2	12.1	12.4	16.0
3: associate professional & technical occupations	14.4	13.8	14.8	12.7
4: administrative and secretarial occupations	12.0	12.9	12.3	9.1
5: skilled trades occupations	10.7	10.3	9.6	8.8
6: personal service occupations	7.9	8.7	8.1	6.3
7: sales and customer service occupations	7.6	8.3	8.9	10.0
8: process, plant and machine operatives	7.1	8.1	7.5	7.8
9: elementary occupations	11.3	11.7	11.2	10.1

A1.2 VAT Registered Businesses

Stocks of VAT-Registered Businesses and Registrations

	England			North West			Greater Manchester			Trafford		
	Registrations	Stocks at end of year	Registrations as % of Stocks	Registrations	Stocks at end of year	Registrations as % of Stocks	Registrations	Stocks at end of year	Registrations as % of Stocks	Registrations	Stocks at end of year	Registrations as % of Stocks
1997	159,935	1,414,080	11.3%	17,700	161,485	11.0%	7,295	59,890	12.2%	890	6,700	13.3%
1998	160,360	1,449,995	11.1%	17,545	163,580	10.7%	7,355	60,700	12.1%	880	6,895	12.8%
1999	155,630	1,478,330	10.5%	16,875	165,305	10.2%	7,055	61,295	11.5%	855	7,080	12.1%
2000	157,815	1,503,765	10.5%	17,155	166,990	10.3%	7,065	61,735	11.4%	910	7,280	12.5%
2001	149,460	1,521,285	9.8%	16,485	168,415	9.8%	6,550	62,030	10.6%	755	7,260	10.4%
2002	155,770	1,541,155	10.1%	17,385	170,250	10.2%	6,975	62,585	11.1%	850	7,280	11.7%
2003	168,250	1,574,270	10.7%	19,005	174,185	10.9%	7,310	63,665	11.5%	855	7,455	11.5%
2004	160,565	1,602,230	10.0%	18,080	177,525	10.2%	7,095	64,725	11.0%	830	7,485	11.1%
2005	158,995	1,635,845	9.7%	17,940	181,795	9.9%	7,170	66,285	10.8%	880	7,760	11.3%
2006	159,315	1,670,500	9.5%	17,920	186,045	9.6%	7,290	67,935	10.7%	930	8,020	11.6%
Change 1997-2006		256,420			24,560			8,045			1,320	
Growth 1997-2006		18%			15%			13%			20%	

VAT Registrations per 10,000 Population 1997-2006

	England	North West	Greater Manchester	Trafford
1997	33	26	29	42
1998	33	26	29	41
1999	32	25	28	40
2000	32	25	28	43
2001	30	24	26	36
2002	31	26	28	41
2003	34	28	29	41
2004	32	27	28	39
2005	32	26	28	42
2006	31	26	29	44

Source: VAT Registrations/De-registrations by Industry, Crown Copyright, from Nomis 19.11.07

Three-year survival rates of VAT registered enterprises, 1995-2002

	1995	1996	1997	1998	1999	2000	2001	2002	Change 1995-2002
All England and Wales	65	67	68	68	68	68	69	71	6
Urban	63	65	67	66	66	66	68	70	7
NORTH WEST	63	64	65	65	66	66	68	71	8
Greater Manchester	60	61	61	63	63	64	65	69	9
Trafford	66	62	67	67	63	69	69	72	6

One-year survival rates of VAT registered enterprises, 1995-2004

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	Change 1995-2004
All England and Wales	88	88	90	90	90	90	91	92	93	92	4
Urban	87	88	89	89	90	90	91	91	93	92	5
NORTH WEST	86	86	87	88	89	89	90	92	93	92	6
Greater Manchester	85	85	86	87	88	88	89	91	93	91	6
Trafford	88	86	90	90	91	90	92	92	94	92	4

Source: DTI Small Business Service, February 2007

A1.3 Residents

Annual Gross Pay 2007

	All Workers	Full Time Workers	Part Time Workers
England	£20,280	£24,428	£7,970
North West	£19,072	£22,817	£8,033
% of England Average	94%	93%	101%
Trafford	£22,227	£27,800	£7,947
% of England Average	110%	114%	100%

Source: Annual Survey of Hours and Earnings - Resident Analysis, Crown Copyright, from Nomis 19.03.08

Qualifications of Residents 2006

	% with NVQ4+	% with NVQ3 only	% with NVQ2 only	% with NVQ1 only	% with Trade Apprenticeships	% with degree or equivalent and above	% with no qualifications (NVQ)
England	27	15	16	14	5	20	14
North West	25	16	17	15	6	17	16
Greater Manchester	25	16	17	13	6	18	17
Trafford	37	18	17	11	4	27	8

Source: Annual Population Survey, Crown Copyright, from Nomis 29.08.07

Benefit Claimants, 4-quarter Averages

		4-quarter Average				4-quarter Average as % of WAP			
		England	North West	Greater Manchester	Trafford	England	North West	Greater Manchester	Trafford
All claimants	May 2000	4,470,305	813,535	308,418	18,393	14.8%	19.8%	20.0%	14.3%
All claimants	May 2001	4,354,215	793,818	301,650	17,728	14.3%	19.3%	19.4%	13.8%
All claimants	May 2002	4,343,250	785,970	299,850	17,718	14.2%	19.0%	19.2%	13.8%
All claimants	May 2003	4,500,518	801,038	306,768	18,103	14.6%	19.2%	19.5%	14.0%
All claimants	May 2004	4,439,895	779,785	299,983	17,538	14.3%	18.6%	18.9%	13.6%
All claimants	May 2005	4,382,743	761,205	293,968	17,255	14.0%	18.0%	18.4%	13.3%
All claimants	May 2006	4,426,618	760,398	294,615	17,213	14.0%	18.0%	18.3%	13.2%
All claimants	May 2007	4,412,168	754,310	294,145	17,183	14.0%	17.8%	18.3%	13.2%
job seeker	*May 2000*	*946,788*	*146,700*	*52,445*	*3,283*	*3.1%*	*3.6%*	*3.4%*	*2.6%*
job seeker	*May 2001*	*825,460*	*130,153*	*46,245*	*2,928*	*2.7%*	*3.2%*	*3.0%*	*2.3%*
job seeker	*May 2002*	*776,323*	*122,025*	*44,945*	*2,915*	*2.5%*	*2.9%*	*2.9%*	*2.3%*
job seeker	*May 2003*	*769,655*	*116,343*	*44,300*	*2,743*	*2.5%*	*2.8%*	*2.8%*	*2.1%*
job seeker	*May 2004*	*713,670*	*103,210*	*39,718*	*2,400*	*2.3%*	*2.5%*	*2.5%*	*1.9%*
job seeker	*May 2005*	*681,468*	*97,260*	*36,663*	*2,273*	*2.2%*	*2.3%*	*2.3%*	*1.8%*
job seeker	*May 2006*	*772,243*	*112,828*	*42,275*	*2,368*	*2.4%*	*2.7%*	*2.6%*	*1.8%*
job seeker	*May 2007*	*774,280*	*115,755*	*44,170*	*2,473*	*2.4%*	*2.7%*	*2.7%*	*1.9%*
incapacity benefits	May 2000	2,115,895	440,118	168,970	9,768	7.0%	10.7%	10.9%	7.6%
incapacity benefits	May 2001	2,169,120	445,185	171,353	9,815	7.1%	10.8%	11.0%	7.6%
incapacity benefits	May 2002	2,191,275	442,153	169,810	9,793	7.1%	10.7%	10.9%	7.6%
incapacity benefits	May 2003	2,211,590	440,618	169,435	9,735	7.2%	10.6%	10.8%	7.5%
incapacity benefits	May 2004	2,221,430	437,510	169,103	9,690	7.1%	10.4%	10.7%	7.5%
incapacity benefits	May 2005	2,215,468	431,823	168,583	9,663	7.1%	10.2%	10.6%	7.5%
incapacity benefits	May 2006	2,176,673	418,773	165,000	9,515	6.9%	9.9%	10.3%	7.3%
incapacity benefits	May 2007	2,148,543	409,103	162,153	9,428	6.8%	9.7%	10.1%	7.2%

Source: DWP Benefit Claimants – Working Age Client Group, from Nomis on 20.02.08

Job Vacancies, Claimants and Vacancy Ratio

	notified vacancies			Total claimants			Claimants per vacancy		
	England	North West	Trafford	England	North West	Trafford	England	North West	Trafford
January 2007	237,829	49,066	2,721	795,143	117,347	2,400	3.3	2.4	0.9
February 2007	247,213	50,778	2,791	797,121	117,910	2,428	3.2	2.3	0.9
March 2007	250,279	51,227	2,795	795,998	117,925	2,454	3.2	2.3	0.9
April 2007	258,484	52,256	2,821	792,190	117,571	2,460	3.1	2.2	0.9
May 2007	258,099	51,695	2,661	786,886	116,924	2,452	3.0	2.3	0.9
June 2007	269,095	52,976	2,719	780,294	116,130	2,446	2.9	2.2	0.9
July 2007	273,602	52,859	2,646	774,253	115,505	2,441	2.8	2.2	0.9
August 2007	272,874	52,222	2,662	767,975	114,890	2,429	2.8	2.2	0.9
September 2007	285,919	53,095	2,655	760,331	114,125	2,429	2.7	2.1	0.9
October 2007	289,063	52,197	2,519	750,821	113,077	2,392	2.6	2.2	0.9
November 2007	290,572	51,567	2,435	741,363	112,123	2,352	2.6	2.2	1.0
December 2007	297,239	52,114	2,429	732,804	111,442	2,327	2.5	2.1	1.0
January 2008	289,604	50,468	2,370	726,491	111,097	2,309	2.5	2.2	1.0
February 2008	309,301	53,751	2,533	718,845	110,453	2,278	2.3	2.1	0.9
March 2008	311,932	53,637	2,545	710,221	109,665	2,243	2.3	2.04	0.9

Source: DWP from Nomis on 16.04.08

Jobs Density

	Total Jobs	Jobs Density
England	26,478,000	0.85
North West	3,360,000	0.80
Greater Manchester North	493,000	0.68
Greater Manchester South	810,000	0.93
Trafford	137,000	1.04
Bolton	125,000	0.77
Bury	69,000	0.61
Manchester	328,000	1.10
Oldham	96,000	0.73
Rochdale	87,000	0.68
Salford	123,000	0.90
Stockport	137,000	0.80
Tameside	86,000	0.64
Wigan	116,000	0.61

Jobs density = number of jobs per resident of working age, not number of employees

Source: ONS Jobs Density, Crown Copyright, from Nomis 21.08.07

Appendix B

Site Appraisal Criteria

B1 Site Appraisal Criteria

B1.1 Site Details and Quantity Audit

Criterion	Methodology	Assessor
Site name	Officer Assessment	Simon Pateman
Site address	Officer Assessment	Simon Pateman
Unique site reference number	Officer Assessment	Simon Pateman
Total undeveloped area	GIS-based Assessment	Simon Pateman
The proportion of Brownfield/Greenfield land	GIS-based Assessment using historic maps and with reference to PPS3 Annex B definition for previously developed land.	Simon Pateman
Ownership (see ownership constraints).	Officer Assessment	Simon Pateman
Most appropriate uses: i.e. B1 (a), (b), (c); B2; B8; general 'B' class use or mixed use	Officer Assessment based on value judgement	Simon Pateman

B1.2 Sustainability

Criterion	Scoring	Methodology	Assessor
Location type. The location of sites determines to a large extent their sustainability credentials, i.e. employment sites away from the Manchester City Region (MCR) Regional Centre are generally less sustainable and contribute less to regeneration than those within it or in town centres. The MCR Inner Area is not included here because of its focus on residential development.	A. Regional Centre [5] B. Town Centre [4]; C. Edge of Centre [3]; D. Out of Centre[2]; E. Urban fringe[1]; F. Rural [0].	Map-based assessment	Simon Pateman
Suitability for Employment Development - Surrounding Uses and Proximity to Residential Areas and Services. A description of the land uses immediately adjacent to the sites to assess the potential impact from change of use and/or limiting factors for the release of the site for an alternative use.	A. Very suitable [5]; B. Moderately suitable [3]; C. Unsuitable [0].	GIS-based assessment. Proximity to residential areas or greenspace, for example, interpreted as making the site less suitable for employment, particularly B2 and B8 uses.	Simon Pateman
Accessibility by public transport.			

Criterion	Scoring	Methodology	Assessor
The availability of good quality and regular public transport services and infrastructure ensure that a greater proportion of the population can access employment by non-car modes of transport and this would represent more sustainable locations.	A. Most Accessible (MA) - is defined as 800 metres from a train station or tram stop, or 400 metres from a quality bus corridor route [5]; B. Accessible (A) - is defined as 400 metres from a bus stop with a service of at least every 15 minutes or 250 metres from a bus stop with a service of at least every 30 minutes [3]; C. Least Accessible (LA) – is defined as all areas outside of these [1].	GIS-based assessment. The accessibility of the location was assessed using the Council's Accession modelling software used to calculate distance/time to/from employment locations.	Simon Pateman / GMTU.
Pedestrian and Cycle Access These are the most sustainable means of transport. Sites that are most accessible on foot or by bicycle are more sustainable. Description to indicate if good pedestrian and cycle accessibility exists	A. Direct access to both [5]; B. Direct access to one [3]; C. Access to neither [0].	Map-based assessment / Site observation.	Simon Pateman
Previously Developed land or Greenfield Development on PDL minimises the requirement for Greenfield site use and is therefore more sustainable	A. Whole [5] B. Part [3] C. Greenfield [0]	GIS-based assessment / Site observation. Determined using PPS3 Annex B definition for previously developed land	Simon Pateman
Flood Risk Sites outside of the flood zone areas are more sustainable locations. Sites in proximity to the Manchester Ship Canal and the Bridgewater Canal can not be assessed and are scored as zero because of lack of quantified data on flood risk arising from these bodies of water.	A. Low [5] B. Medium [2] C. High/unknown [0]	GIS-based assessment. Flood risk is assessed against the Environment Agency flood zone maps, December 2007	Simon Pateman
Environmental Impact Any site development that has implications for air/water quality, landscape quality and includes tree felling would have a negative impact.	A. Negligible [5] B. Moderate [3] C. High [0]	Environmental impact has been assessed by the Sustainability and Green Spaces Team for the potential impact on biodiversity in the Borough	Paul Farrand

Criterion	Scoring	Methodology	Assessor

B1.3 Planning Policy

Criterion	Scoring	Methodology	Assessor
Emerging Regional Spatial Strategy and Regional Economic Strategy ▪ Conformity to the RSS key objectives and Core Development Principles (Yes/No); ▪ Compliance with the key principles and objectives of the RES (Yes/No); ▪ Is the site located in the Manchester sub-regional centre[7]? (Yes/No) ▪ Is the site located in the Manchester sub-regional inner area[8]? (Yes/No) A site must be able to contribute to delivering the objectives of the RSS and RES due to its beneficial characteristics, locations, nature and size.	A. High relevance to several RSS/RES objectives [5] B. Moderate relevance to RSS/RES objectives [3] C. Limited relevance to RSS/RES objectives [1]	Officer Assessment	Simon Pateman
Planning permission status If a site has full planning permission for employment use it will receive a maximum score whereas sites that have extant permission for non-employment use will receive a zero score.	A. Full planning permission for employment use [5] B. Outline planning permission or permission granted subject to legal agreement for employment use [4]; C. Full planning or outline planning permission for mixed use development [3]; D. Allocated in UDP, but no planning permission sought [2]; E. No status [1] F. Planning permission for non employment use [0].	Officer Assessment. Status determined using Employment Land Availability Schedule produced by Trafford Council in April 2008.	Simon Pateman
Planning policy environmental constraints.			

[7] See Policy MCR2 –RSS September 2008, p128-129.
[8] See Policy MCR2 –RSS September 2008, p128-129.

Criterion	Scoring	Methodology	Assessor
These criteria will assess whether the site has any potential conflict with environmental constraints[9]. 1. Green Belt; 2. Protected open land; 3. Local designation; 4. Other restriction.	A. None of the criteria - unconstrained [5]; B. One of the criteria [3]; C. Two or more of the criteria [1].	Officer Assessment with reference to UDP and Parks & Countryside where necessary.	Simon Pateman / Paul Farrand.
Strategic Development Sites As identified in the current Trafford adopted UDP (See Part II Proposal E13 – Strategic Development Sites):	A. Major high amenity site [5]; B. Sub-regional site [4]; C. Local site [3]; D. Developed sites [2]; E. No designation [0].	Officer Assessment with reference to the UDP.	Simon Pateman
Site within an area for priority regeneration, improvement or protection. Is the site located within an area that is subject to an area-based regeneration policy, such as a Priority Regeneration Area (PRA), as identified in the current Trafford UDP?	A. Site within PRA [5] B. Site within Area for Improvement [3] C. Site within neither of the above – Area for Protection [0]	Officer Assessment with reference to the UDP	Simon Pateman

[9] Green belt is defined in the Revised Trafford UDP Adopted June 2006 policy C4; protected open land is defined by UDP policies, OSR5; OSR6 and C8; Local Designations are defined by UDP policies ENV6, ENV9 and ENV10; and other restrictions are defined by UDP policies, ENV17, ENV21, ENV26, ENV27 and TP10.

B1.4 Market Attractiveness

Criterion	Scoring	Methodology	Assessor
Availability Determines whether sites are immediately available for development or if there is any reason, such as land assembly, would delay availability.	A. Site is available, fully serviced and actively marketed [5]; B. Site is likely to be available within the next three years [4]; C. Site is not likely to be available within the next three years, site preparation is required [3]; D. Site is generally available, reserved for a specific business/user or unwilling seller [2]; E. Unknown [1].	Officer Assessment based on research involving planning history, officer knowledge (Economic Development), Trafford Park Masterplan consultant (CBRE) and research on the ground (site visits).	Simon Pateman / Economic Development / CBRE
Constraints The availability of a site can be affected by physical constraints. Sites with no constraints score maximum whilst sites with multiple issues score poorly. Constraints include: contamination; lack of services; capacity of existing services, topography; poor access, ground instability and major underground obstructions	A. No constraints [5] B. One constraint [4] C. Two constraints [3] D. Three constraints [2] E. Four [1] F. Five or more constraints [0]	Officer assessment based on historic maps, previous site analysis, site visits, planning application and pre-app document reviews and officer knowledge.	Simon Pateman
Broadband Access Access to this basic ICT requirement is vital for encouraging the required growth sectors in the borough.	A. Yes [5] B. No [0]	Officer assessment based on postcode searches on the BT website for line capacity.	Simon Pateman
Ownership constraints Ownership needs assessing in order to establish whether there are any potential issues with release due to multiple ownership, investor ownership or rented property	A. Local Authority [5]; B. Other public body [4]; C. Private [3]; D. Mixed ownership [2]; E. Unknown [1].	Officer Assessment based on Land Registry and Council Terrier data.	Simon Pateman

Criterion	**Scoring**	**Methodology**	**Assessor**
Commercial viability This considers the extent to which employment development of the site would represent a viable development opportunity. Market interest in the site for the proposed use and financial viability are the key criteria for assessing this.	A. Highly viable [5]; B. Moderately viable [3]; C. Marginal viability [1]; D. Unviable [0].	Trafford Park sites were assessed by Economic Development and the Trafford Park Masterplan team at a meeting (2nd May 2008) and subsequently with dialogue with Nick Mullins from CBRE. In terms of the other sites, various information sources were consulted – MIDAS database, Estates Gazette, site visit information and discussion with other council services (mainly Economic Development).	Simon Pateman / Economic Development / CBRE.
Road Frontage and Prominence Good road access to a site would make the site more attractive to the market. Sites with a service road frontage are usually the most accessible.	A. Main road frontage and prominent [5]; B. Main road frontage [4]; C. Road frontage and prominent [3]; D. Road frontage [1]; E. None [0].	Map-based Assessment	Simon Pateman
Access to Trunk and Primary Road Network Accessibility of the site is an important factor in assessing the attractiveness of a site. This includes accessibility to the workforce and to enable goods and services to be brought in and distributed within the sub-region, region and beyond. Sites are assessed by proximity to the trunk and motorway network	A. Excellent (< 1 mile) [5]; B. Good (< 3 miles) [4]; C. Reasonable (< 5 miles) [3]; D. Poor (< 7 miles) [2]; E. Very Poor (> 10 miles) [1].	Map-based Assessment	Simon Pateman
Proximity to rail freight, sea freight and air freight Sites are scored on the basis of proximity (NB there are no major port facilities within the 15 mile catchment for sites in Trafford. However the Manchester Ship Canal presents a massive opportunity for this mode of freight to be utilised).	A. Site located within 15 miles of a major port, rail freight and airport [5]; B. Site located within 15 miles of two different types of freight terminal [4]; C. Site located within 15 miles of	Map-based Assessment	Simon Pateman

Criterion	Scoring	Methodology	Assessor
	either a major port, airport or rail terminal [3]; or D. Site located beyond 15 miles of a major port, airport or rail terminal [1].		

Appendix C

Summary of Trafford Council Site Assessments

C1 Summary of Trafford Council Site Assessments

Top Third
Middle Third
Bottom Third

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
72103/00	Land at Nash Road (Trinity Business Park)	1.16	Cleared Employment PDL	60%	80%	71%	70%	Retain
72101/00	Guiness Circle	0.31	Cleared Employment PDL	60%	72%	60%	63%	Retain
72094/00	Former Kratos Site	3.60	Uncleared Employment PDL	71%	68%	82%	75%	Retain
72079/00	Electric Park	2.33	Cleared Employment PDL	71%	96%	76%	79%	Retain
72073/01	Twining Road	1.75	Cleared Employment PDL	60%	80%	78%	72%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
72066/02	Southbank	2.30	Cleared Employment PDL	80%	84%	82%	82%	Retain
72006/00	Gervin Site, Thompson Road	1.32	Cleared Employment PDL	46%	68%	51%	53%	Retain
62017/00	Elsinore Road	4.00	Cleared Employment PDL	89%	80%	69%	78%	Retain
60021/00	39 Talbot Road	0.35	Uncleared Employment PDL	94%	80%	84%	87%	Retain
60020/00	Rear of 464-470 Chester Road	0.25	Uncleared Employment PDL	80%	60%	76%	73%	Retain
32019/00	Former Gas Works Site, Manchester Road	27.60	Uncleared Employment PDL	77%	68%	76%	74%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
32013/04	Former BP Terminal, Manchester Road	26.00	Cleared Employment PDL	49%	68%	78%	66%	Retain
32013/03	Former BP Terminal, Manchester Road	2.33	Uncleared Employment PDL	57%	80%	67%	67%	Retain
32008/00	Shell Chemical Works, Carrington North	4.50	Greenfield	57%	68%	76%	68%	Retain
32005/00	Carrington Business Park, Manchester Road	5.80	Greenfield	49%	84%	76%	69%	Retain
10040/00	Former Holts Blends Premises	0.52	Uncleared Employment PDL	86%	72%	69%	75%	Retain
10039/00	Bayer site, Manchester Road	1.72	Uncleared Employment PDL	71%	56%	80%	71%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
72123	Container Base	10.90	Uncleared Employment PDL	0.71	0.56	80%	71%	Retain
72122	Canal side Argos Depot	9.90	Uncleared Employment PDL	0.71	0.6	82%	73%	Retain
72121	Area south of Taylor Road	4.03	Uncleared Employment PDL	0.71	0.56	80%	71%	Retain
72120	The Bridgewater Centre	5.14	Uncleared Employment PDL	0.71	0.6	76%	70%	Retain
72119	Land at Nash Road	0.37	Cleared Employment PDL	60%	60%	56%	58%	Retain
72118	Land at Nash Road	0.70	Cleared Employment PDL	60%	68%	56%	60%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
72117	Phase 2 – Plot 13, Waterside	0.74	Cleared Employment PDL	86%	84%	71%	79%	Retain
72116	Land adjacent the Bridgewater Canal and MSC	1.13	Cleared Employment PDL	51%	72%	62%	61%	Retain
72115	Land at Ashburton Road West	1.65	Uncleared Employment PDL	66%	68%	69%	68%	Retain
72114	Land at Nash Road	0.95	Cleared Employment PDL	60%	68%	53%	59%	Retain
70131	Land at Mosley Road	3.70	Uncleared Employment PDL	71%	80%	78%	76%	Retain
70129	Land bound by Ashburton Road West	1.88	Cleared Employment PDL	60%	80%	84%	75%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
70125	Land west of the Victoria Warehouse	0.40	Cleared Employment PDL	86%	88%	82%	85%	Retain
70026	Warren Bruce Road	0.62	Cleared Employment PDL	80%	96%	76%	82%	Retain
70025	Victoria Warehouse	1.03	Uncleared Employment PDL	80%	88%	78%	81%	Retain
62126	Bakemark UK Site	2.48	Uncleared Employment PDL	89%	68%	76%	78%	Retain
60027	Northumberland Road	0.68	Cleared Employment PDL	86%	72%	84%	82%	Retain
60022	Warwick Road South	0.36	Uncleared Employment PDL	83%	72%	73%	76%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
60012	Former Trafford Press	0.60	Uncleared Employment PDL	80%	64%	84%	78%	Retain
32132	Land at Carrington A	69.30	Uncleared Employment PDL	57%	60%	62%	60%	Retain
32132	Land at Carrington B	48.00	Uncleared Employment PDL	80%	64%	84%	78%	Retain
32132	Land at Carrington C	59.60	Greenfield	83%	72%	73%	76%	Release
12127	Land at Deansgate Lane	0.87	Uncleared Employment PDL	66%	44%	67%	61%	Retain
12048	Limberts Transport, Skelton Road	0.28	Uncleared Employment PDL	86%	52%	62%	68%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
10133	Altair	2.99	Uncleared Employment PDL	91%	72%	78%	81%	Retain
10046	Hartington House, Hartington Road	0.29	Uncleared Employment PDL	80%	60%	67%	70%	Retain
	Land at Nash Road	1.14	Uncleared Employment PDL	60%	60%	53%	57%	Retain
42002/00	Davenport Green	36.40	Greenfield	17%	56%	73%	50%	Release
12015/00	Land at Dairyhouse Lane	3.20	Greenfield	51%	52%	64%	57%	Release
32012/01	Former Powergen Site – Phase 1, Carrington North	16.54	Cleared Employment PDL	40%	64%	67%	57%	Retain
32020	Former Carrington Power Station, Manchester Road	5.20	Cleared Employment PDL	49%	72%	62%	60%	Retain

Site Ref	Site Name	Area	Type of Site	Sustainability %	Policy %	Market Attractiveness %	Total %	Status
12020/00	Land at Craven Road	0.80	Cleared Employment PDL	86%	60%	67%	71%	Mixed Use
10021/00	Bridge Works, Manchester Road	0.30	Uncleared Employment PDL	71%	52%	62%	63%	Mixed Use
12128	Fomer Linotype Works	4.95	Uncleared Employment PDL	0.60	0.6	64%	62%	Mixed Use

Appendix D

Full Trafford Council Site Assessments and Plans

D1 Full Trafford Council Site Assessments and Plans

Appendix E

Overview of Strategic Infrastructure/ Constraints in Trafford

E1 Overview of Strategic Infrastructure/ Constraints in Trafford

E1.1 Introduction

This section sets out the main strategic infrastructure issues for Trafford. This relates to water supply, water treatment, highways infrastructure, telecoms and the electricity and gas network. In obtaining information Trafford Council have consulted with United Utilities, Electricity North West and the Highways Agency. In addition, reference has also been made to the emerging Trafford Local Infrastructure Plan which has, in addition to the consultees already mentioned, involved consultation with British Telecoms and National Grid. For utilities information such as water and electricity information provided is focused on the implications of Growth Point / Eco town development in the area, however from consultations with the utilities providers it is recognised that housing and employment development should be considered together and therefore many of the issues and principles set out in the information provided are relevant to the future employment development in the district .

E1.2 Water Supply and Quality

Trafford is currently provided with drinking water from major Lake District aqueducts and the Manchester Ring Main. United Utilities have stated that they do not foresee any water provision issues for Trafford and its predicted growth. But there may be a need to provide local water network reinforcement for significant developments at the expense of the developer. In order to meet ever-increasing water quality investment is being made to maintain the water supply system in Trafford. Some of the water pipes date back to Victorian times and this work is all part of United Utilities' modernisation programme. The refurbishment and cleaning of the pipes will help reduce the risk of low water pressure and discoloured water to homes and business premises.

E1.2.1 Water Treatment

Between 2005 and 2010 United Utilities are investing more than £34 million to improve and maintain the wastewater treatment works in Trafford to deliver cleaner rivers, streams and coastal bathing waters. United Utilities are investing more than £12 million preventing sewer overflows into local rivers and streams, £1.8 million improving and maintaining the local sewer network and £130,000 to help prevent sewer flooding to properties.

Much of the information provided on waste water treatment has been in the context of Trafford becoming a Growth point for development. In considering these we have assumed that the same principles should apply for drainage when considering employment development.

In general, it is considered that a more integrated approach to urban drainage is going to be critical for the ability to properly deal with land drainage, flood prevention and sustainable water infrastructure management (water supply and waste water treatment) issues. To ensure that water management and infrastructure requirements are integrated into the development of spatial options and site allocations DPD's, United Utilities and the Environment Agency must be involved in early in the process.

- Developments need to drain on a separate system, with only foul drainage connected into the foul sewer. Surface water discharges to the watercourse/soakaway/surface water sewer and this may require the consent of the Environment Agency.
- If it is necessary to discharge surface water to the public sewerage system United Utilities may require the flow to be attenuated to a maximum discharge rate determined by United Utilities.

- Despite the challenges they present, key to reducing loads on drainage infrastructure will be the increased use of SUDS. The principle underlying drainage from growth points and eco-towns should therefore be that drainage from any development which doesn't incorporate SUDS techniques will not be accepted unless the developer can prove that they have considered all possible alternatives (including on-plot controls) and can justify why these are genuinely not appropriate. However, addressing maintenance and adoption issues will be critical as will assessing their appropriateness in certain locations.

To assist the LDF preparation process and to ensure effective implementation of the drainage principles it is recommended that a drainage strategy is developed to ensure that the drainage principles are fulfilled. Any drainage strategy must demonstrate that the existing sewerage and surface water drainage systems and waste water treatment works have the capacity to deal with the increased loads these developments will bring over their lifetimes. If a capacity issue is identified, the strategy must set out how this will be addressed in time to serve the development. The strategy should also ensure best practice in integrated water management is achieved more generally. This will minimise development impact on infrastructure and ensure the longer term issues like climate change are addressed. This might be achieved, for instance, through the development of a SPD and the inclusion of relevant policies within LDF's.

The development of a drainage strategy requires a joined up collaborative approach, underpinned by close working relationships between relevant parties including the Utility Company, the EA and the local authority. The often cross boundary nature of water supply and waste water infrastructure catchments (in terms of supply of and demand for capacity) means the need to operate and understand development issues for groups of authorities can be very useful.

A drainage strategy should lead to:

- An understanding of where the homes and other development are to be spatially located and over what timescales. This then allows an assessment of implications on the longer term asset management and investment funding processes.
- The development of partnership approaches between organisations with responsibilities for drainage to ensure integrated solutions. This should build on lessons emerging from the DEFRA Making Space for Water pilot in Salford in the Lower Irwell Valley. An agreed understanding on appropriate SUDS techniques should be contained within the drainage strategy. This should identify what SUDS are likely to be appropriate, suitable and acceptable on various different sites and developments, taking into account adoption and maintenance issues. This should be informed by the Authorities own Strategic Flood risk Assessments and the Environment Agency's Catchment Flood Management Plans.
- Identification of opportunities for open spaces to provide sustainable drainage function. This may be relevant in controlling runoff from high density brownfield urban redevelopment where on site space for SUDS is impossible. Where this open space is in public ownership and/or maintained by management companies, there are opportunities to overcome current adoption and maintenance issues.
- Consideration of locations where Permitted Development Rights need to be removed to prevent householders paving over gardens with non-permeable surfaces leading to an unacceptable reduction in infiltration and increase in flood risk.

E1.2.2 Wastewater

Wastewater Treatment Works (WwTW) in Trafford are located at Altrincham, Davyhulme, Partington, Sale, Stretford and Urmston. Further detail of the wastewater capacity in each area is explained in more detail below.

Area	Infrastructure Capacity Status
Altrincham	There are a lot of sewer capacity issues in Altrincham with some very concentrated problem areas.
Carrington	In regard to the Shell Carrington site, the drainage of the site is currently dependent on a privately owned pumping station and rising main and the condition of this is unknown. Therefore the potential to drain the site satisfactorily is unknown
Hale	There are a lot of sewer capacity issues in Hale with some very concentrated problem areas.
Old Trafford	There are sewer capacity issues to the West of this area.
Partington	The current plans for development at the side of the Ship Canal approach the waste water treatment site and therefore the South West extremity of this proposed development should not take place.
Sale	There are a lot of sewer capacity issues in Sale.
Sale Moor	There are a lot of sewer capacity issues to the North West of Sale Moor.
Sale West (Ashton upon Mersey)	There are a lot of sewer capacity issues in Sale West.
Stretford	There are a lot of areas in Stretford with sewer capacity problems.
Timperley	There are sewer capacity issues to the West of Timperley.
Trafford Quays (North West of the Trafford Centre)	The concern with this site is its proximity to two significant Wastewater Treatment Works. Davyhulme (Manchester's treatment works) WwTW is one of the largest WwTW's in Europe and there has already been investment of £10's of Millions in odour prevention to the benefit of the Trafford Centre and the surrounding population (when Davyhulme was first built in 1894, it was way out of town). The predominant winds across the site are North Westerly and this would be very concerning for a development proposal at Trafford Quays. If the development was allowed to proceed, infrastructure users across the whole region would need to support further investment of more £10's of Millions just so the development could proceed.
Trafford Park	There are no particular issues for Trafford Park although there is an Aqueduct (Manchester Ring Main) and the major (3metres & 4metres diameter) Davyhulme WwTW inlet sewers passing through the area and building is not allowed in their proximity.
Urmston	There are some sewer capacity issues towards the West of Urmston.

E1.3 Gas and Electricity Networks

E1.3.1 Gas

National Grid Gas plc owns and operates the local gas distribution network in the Northwest. Any changes to the local network will arise from the mains replacement programme as well as requests for customer connections and/or significant changes in demand requiring reinforcements to the local network as required.

The following National Grid gas transmission assets are located within Trafford's administrative area:

- Pipeline 1030 Feeder 4 Plumley – Warburton
- Pipeline 1031 Feeder 4 Warburton – Partington
- Pipeline 1039 Feeder 15 Warrington – Warburton
- Pipeline 2616 Feeder 21 Warburton Fenceline – Warburton
- Pipeline 2617 Feeder 21 Warrington – Warburton Fenceline

E1.3.2 Electricity

National Grid operates the national electricity transmission network across Great Britain and owns and maintains the network in England and Wales, providing electricity supplies from generating stations to local distribution companies. The company does not distribute electricity to individual premises directly, but its role in the wholesale market is essential to ensuring a reliable and quality supply to all. It is the role of local distribution companies to distribute electricity to homes and businesses.

National Grid's high voltage electricity transmission assets within Trafford's administrative area that form an essential part of the electricity transmission network in England and Wales, include the following:

- ZQ line 400,000-volt route goes from Daines substation to Tottington Tee;
- ZZN line 275,000-volt route from Daines substation to South Manchester substation;
- ZE line 400,000-volt route from Carrington substation to Drakelow substation. Steel work replacement on this line is currently being undertaken; and
- ZO line 400,000-volt route from Carrington substation to Deeside substation.

The following substations are also located within Trafford's administrative area:

- Daines - no further development at this substation is foreseen at present.
- South Manchester - this is a key feed for Manchester. System reinforcement at the existing substation site may be required to support demand growth in the Manchester area.
- Carrington - there is a potential requirement for a new 400kV substation to connect new generation capacity to the transmission system. Any development would probably be within the confines of the existing substation.

Information received from providers detail that developments in Trafford should not in principle represent a major issue for National Grid's electricity or gas transmission network. The precise nature of the influence of the proposed developments on gas and electricity infrastructure will need to be determined in the first instance via discussion with the relevant gas and electricity Distribution Network Operators (DNOs, National Grid and United Utilities respectively). National Grid will then discuss any requirements for transmission system reinforcement with the DNOs.

E1.4 Utility Impact Assessment

Trafford Quays has been identified as an area in need of a Utility Impact Assessment, prior to any further development. The assessment may include:

- Electrical Distribution capacity;
- Water Resources capacity;
- Water Treatment capacity;

- Water Supply Distribution capacity;
- Wastewater Network (Sewerage) capacity; and
- Wastewater Treatment capacity.

E1.5 Highways Infrastructure

A number of reports and studies have concluded that the highway network in the North West is running at, if not above, capacity. 2006 data supplied by HATRIS produced a stress map of the area which indicts that within Trafford there is a similar situation. The highway network between Altrincham and Lyme and Hale and Alderly edge, in 2006, was operating at 150%, 50% extra stress than the normal level.

Within Trafford, no routes were seen to be operating under capacity which has an impact on the residents and businesses in the area. If major routes in and out of the area and to major businesses are congested, a negative impact will be felt from loss of revenue. Forecasted levels for 2016 demonstrate that the M6 and the M62 serving the Manchester and Trafford area will be operating at 150% continuously meaning implications for businesses and residents who use that route. Forecasted levels for 2026 demonstrate the same increase in stress, with more of the major motorway routes operating at over capacity. However a Route Management Strategy has been developed for the M57/M58/A5035 to M6 to Liverpool and M62 which aims to develop a strategic approach to the maintenance, operation and improvement of the highway network. This should ensure that the motorway networks that serve Trafford operate efficiently and provide a safe reliable route into the area.

Within the boundaries of Trafford Borough Council, the M60 South of Junction 6 to North of Junction 10 has been declared an Air Quality Management Area.