



Local Plan 2035
Planning for the future

**ECONOMY AND EMPLOYMENT
TOPIC PAPER 2016**

APRIL 2017



Your Borough: Planning for the future

Economy and Employment Topic Paper – April 2017

1.0 Introduction

- 1.1 The Local Plan 2035 will provide a context for achieving employment and business growth in the borough during the plan period building on the employment allocations in the 2013 Allocations and Designations Local Plan (some of which were intended to provide for beyond the plan period) and recent planning permissions granted. The preparation of the Local Plan is guided by the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (NPPG). Both documents advocate that an evidence based approach to employment land allocation and protection is taken and that the land portfolio should offer sufficient capacity to accommodate expected future demand requirements both in quantitative and qualitative terms. The future requirements for employment land should be established through an objective assessment of need that, as far as possible, seeks to align population growth with economic development.
- 1.2 This paper updates the Economy and Employment Land Study (EELS) published in 2015 alongside other consultation material. The study was undertaken by GVA Bilfinger (GVA) to provide an evidence base to underpin and inform employment land provision and employment land policies focussing on “B” use class jobs in the Borough. B use classes are B1 (business, including offices), B2 (general industrial) and B8 (storage and distribution) for the Local Plan. The study’s approach generally follows Government guidance on undertaking employment land reviews and provides a background to enable the Borough to consider which are the main employment areas in the borough in terms of economic performance and potential and which employment sites are no longer to be protected solely for “B” use class employment use. It does not assess the future land needs of other non “B” use class employment generating uses such as retail, tourism, healthcare and education although some of these are covered by other studies to appraise whether site allocations are justified. Non “B” use class jobs are more locationally diverse, and frequently do not require land allocations as they are not building based or arise from the expansion of existing services on existing sites to meet the needs of new residents and “B” use class businesses. Others may be able to be accommodated within mixed use/employment areas which do not justify protection as main “B” class employment areas.
- 1.3 During preparation of the report there was consultation with local businesses to understand their future needs. An outline summary of the GVA report is attached as Appendix 1. The report is available in full at www.bedford.gov.uk/localplan2035

- 1.4 The objective assessment of housing and employment needs are linked in the borough's Local Plan process. Firstly by incorporating the outputs of economically active residents arising from the Objectively Assessed Need study in the assessment of employment land needs. Secondly by including employment sites for consideration in the Council's Strategic Housing and Employment Land Availability Assessment that GVA considers may reach the end of their functional life within the plan period, where their long term loss would not fundamentally undermine the economic performance or potential of the borough.
- 1.5 Since 2015 there have been changes which have led to the need to prepare an addendum to EELS in the form of a Topic Paper to take into account:-
- The plan period has been revised from 2012-2032 to 2015-2035 to provide a 15 year timescale post adoption.
 - Revised population and household forecasts led to a revised Bedford Strategic Housing Market Assessment October 2016 with a revised assessment of Objectively Assessed Housing Need and consequential changes to the numbers of economically active residents predicted.
 - Updated 2016 East of England Forecasting Model (EEFM) job forecasts.
 - Changes to the employment land supply position since 2015.
- 1.6 This document explains that the link between housing number and jobs has been re-appraised and sets out the updated supply and demand situation at November 2016 for the plan period to 2035.

2.0 Forecasts of job numbers and employment land requirements

- 2.1 The 2015 EELS study considered two scenarios which comprised of a lower and a higher based jobs forecast: The EEFM figure formed the trend based lower "economic led forecast" of jobs and the figure derived from the December 2015 Bedford Strategic Housing Market Assessment was used as the higher "population led" forecast of workers. From those forecasts estimates of "B" use class jobs were derived. The majority of jobs growth (about 55%) is in the non "B" use classes.
- 2.2 The jobs forecasts have now been updated on the basis of the 2016 population and 2016 EEFM forecasts. The forecast of jobs based on the updated EEFM figures is for 11,400 jobs over the plan period, 570/annum (assuming no change to net commuting). With 55% of jobs being non "B" class this is the equivalent of 5,016 "B" class jobs. Assuming the need to provide for 5,016 "B" use class jobs the land supply requirements for the plan period varies between 77.5 ha as a base level forecast to 179.8 ha depending on assumptions included, as explained below.

- 2.3 The October 2016 update of the Bedford Strategic Housing Market Assessment (SHMA) and Objectively Assessed Need (OAN) based on the up to date (2016) population forecasts estimate the full OAN to be 19,000 dwellings, and a corresponding increase of 9,800 workers. This is consistent with the forecast of jobs based on the updated 2016 EEFM figures of 10,200 workers. There would be sufficient workers to provide for 11,400 jobs over the plan period based on EEFM figures assuming no change to net commuting. The two numbers for workers are quite close and therefore to avoid the need for the testing of a higher and lower figure, the EEFM based figure of 11,400 jobs is used on which to base calculations about land requirements. The ‘no change to net commuting’ assumption is supported by recent and planned employment opportunities in the borough which should enable the borough to retain its attraction as an employment location relative to surrounding areas. Also there was a slight decrease in out commuting evidenced by the 2001-2011 Travel to Work information so there appears to be little justification for expecting a significant change in commuting patterns.
- 2.4 The assumptions used in estimating employment land requirements for “B” use class developments from the total job forecasts can lead to large variations in employment land requirements. The EELS study therefore included sensitivity testing looking at the implications of different assumptions for the higher and lower jobs forecasts to ensure that sufficient land is available for jobs to support the planned housing growth in the borough.
- 2.5 The revisions to the tables in EELS converting the forecast jobs into land requirements are set out in a revised Table 27/28 in Appendix 2 to this paper. The revised forecast for land requirements in the plan period indicates a base employment land requirement of 77.5 ha. Sensitivity testing of lower density development (plot ratio) to reflect edge of town locations, of lower internal employment densities for offices, or both, indicate that depending on the assumptions made the amount of employment land required varies from the base level of 77.5 ha upwards to 151.4 ha (Sensitivity 4). This approach contrasts with the EEFM approach where there is a single scenario based on past trends, largely over a period of economic challenge for the Borough.
- 2.6 In addition the potential impact of a different distribution of employment demands than used for the 2016 EEFM trend based forecasts was also tested to reflect the significant inward investment interest from a range of industrial and distribution businesses who are seeking a base in the area. Based on a 30:30:40 floorspace split (office/industrial/warehouse) the amount of land required for B8 uses increases significantly giving an overall land requirement of 112 ha. If the development density assumptions in sensitivity test 4 are applied to that figure then potentially up to 179.8 ha of employment land could be required.
- 2.7 The GVA report recognised the potential role for Bedford to play within the strategic distribution market as it lies at the heart of the north/south Bedford M1 distribution corridor and has strong east/west connections. There is a “supply led” opportunity to achieve higher levels of growth in the logistics sector, and potentially manufacturing. Bearing in mind the need for jobs to be available to support

housing growth, pressures on “B” use class employment sites for other uses and the need to support the economic growth of the Borough, it is reasonable to assume that the Council should be looking to make sure that there is sufficient land available over the plan period to support an additional 11,400 jobs. This can be achieved by ensuring that employment land supply is towards the upper end of the supply level indicated by the sensitivity testing results – 180 ha.

3.0 **Employment Land Supply**

- 3.1 Existing employment areas in the borough range from newer business parks to older industrial areas with potential for improvement and as yet undeveloped allocations. GVA advise uses such as budget hotels, leisure and dining opportunities are seen as complementary to successful business park developments by potential occupiers who seek more than a “mono- culture” business park.
- 3.2 In order to secure economic growth it is necessary for the Council to ensure that there is sufficient land identified, and also that there is a range of options for new, incoming and growing businesses. The Council identified additional employment sites relatively recently through the Allocations and Designations Local Plan 2013. These allocations have been reviewed as part of this study to ensure that they are still suitable, available and achievable. The vast majority of these sites have a level of developer interest demonstrated through pre-application discussions, planning applications etc. for employment use. The exception to this is Bedford River Valley Park where the landowner discussions have not resulted in planning proposals incorporating B1 uses as enabling development to deliver the water park. However it is possible that a scheme may be progressed during the plan period and it remains part of the potential employment land supply.
- 3.3 Appendix 3 comprises an updated list of “B” use class employment sites/land supply that are currently not developed. Some allocations have been granted permission for non B uses since 2015 and are now excluded. Sites available within existing employment areas and new sites comprise some 158 ha and overall supply including an allowance for vacant premises (which is assumed not to have changed since 2015) amounts to **174** ha. This excludes opportunities that may exist at Twinwoods Business Park, Thurleigh Airfield, and on the former Stewartby Brickworks. It should be noted that at the latter the situation is uncertain due to a recent change of ownership but there are clear aspirations for the site to be developed predominantly for other uses.
- 3.4 There is considerable demand for B8 distribution uses as evidenced by developer interest and two large scale developments have been granted planning permission since 2015:- a 50 ha site for B8 and ancillary B1 and B2 uses at north Wixams and 18 ha site at Bell Farm on the western bypass. There is still a need for B1 strategic business/office parks similar to Priory Business Park on the edge of Bedford

in the plan period and this need may increase with the further emphasis on the growth potential of the Cambridge/Milton Keynes/Oxford corridor. Many office or mixed B1 uses including Research and Development, light industrial and ancillary warehousing require larger sites than are currently available in town centre locations and it is important to make sure sites are available for these types of use. Medbury Farm was specifically allocated in 2013 to cater for this market and although discussions have not yet resulted in a planning application it should continue to be protected to provide for these needs as there are other sites that are more suitable for B8/ B2 uses.

4.0 Conclusions

- 4.1 The SHMA and EEFM forecasts indicate that there will be sufficient workers available for the increase of jobs in the Borough to 2035.
- 4.2 **Employment land supply.** Having carried out sensitivity testing our view is that the existing B use class employment land supply of 174 ha (158ha +16 ha allowance for vacant stock), should be more than sufficient over the plan period to provide for 11,400 jobs, being close to the 180ha upper limit from sensitivity testing. This should ensure that there is a range of sites available, but avoiding over supply that the council could be required to balance by making further housing allocations.
- 4.3 **Existing employment sites.** The EELS appraisal of employment sites identified a range of key employment areas that significantly contribute to the economic function of the borough – those identified as Protect and Enhance, Protect and Develop and Protect and Maintain categories in Appendix 1. These include existing allocations which are still required for the purposes they were allocated. It is proposed that these key employment areas are identified in the plan and protected by policy. This will distinguish them from other employment areas/premises outside the key areas where a more flexible approach will be taken to future proposals for redevelopment for a wider range of employment generating uses to contribute to the overall job opportunities in the borough.
- 4.4 **New employment sites.** The EELS findings do not indicate a need to allocate additional “B” use class sites in the Local Plan and it would not be desirable to allocate additional freestanding sites which could divert pressure away from developing the sites already available. However it would be important to give flexibility to enable the Council to respond to needs, currently unforeseen, that may arise during the period for a site for a specific “B” use class occupier or type of occupier which would add to and diversify the existing portfolio. This is particularly important bearing in mind the borough’s location within the Oxford/Cambridge corridor and planned east/west infrastructure improvements. The review based on 2016 information does not change this conclusion.
- 4.5 Flexibility could be achieved by including a criterion based policy for the assessment of “B” use class proposals in the Local Plan. This would be aimed at supporting “B” use class businesses whose requirements were not met by the allocated sites in suitable locations,

normally well located to provide access to the primary road network. This approach would accord with NPPF para 21 which advises that councils should set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;

- 4.6 In addition if the Development Strategy includes a new settlement it may be appropriate for land within the settlement close to the primary road network to be identified for employment use, either “B” use class or business and leisure type allocations in order to support the development of a more self-contained sustainable community.
- 4.7 If employment sites are developed more quickly than anticipated over the plan period there the Council can address this by deciding to give permission to additional sites using the criteria based policy or by preparing an interim employment site allocations plan.

Appendix 1.

Summary of approach and advice in the Bedford Borough Economic and Employment Land Study August 2015 undertaken by consultants GVA. (The complete document is available on the Local Plan 2035 pages of the website)

- 1.1 The aim of the report is to provide an evidence base to underpin and inform employment land provision and employment land policies in the Borough for the Local Plan. The study looked at the period to 2032. This summary is focussed on the key findings which remain relevant for the period to 2035.
- 1.2 The preparation of the Local Plan is guided by the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (NPPG). Both documents advocate that an evidence based approach to employment land allocation and protection is taken and that the land portfolio should offer sufficient capacity to accommodate expected future demand requirements both in quantitative and qualitative terms.
- 1.3 The 'future requirements' for employment land should be assessed in relation to functional economic market areas and through an Objective Assessment of Need that, as far as possible, seeks to align population growth with economic development needs.
- 1.4 The policy context for the study in the borough and surrounding authorities is set out in section 2. The socio-economic context, the population and employment profile, and skills gap issues are discussed in section 3 and the local property market in section 4.
- 1.5 Section 5 considers the **Functional Economic Market Area**,(FEMA) for the borough which guidance advises is the appropriate area for assessing future employment needs. In summary the findings were that there are various factors to take into account in determining the FEMA.
 - The functional property market area differs between office and the industrial/warehousing sectors. The latter stretches from the M25 in the south along the M1 northwards to Daventry and is likely to stretch as far east as Cambridge as Bedford has almost unique east-west and north-south connections. The office market in the Borough is more localised and principally focussed on local demand and servicing.
 - The FEMA is also defined by the relationship between the borough's economic activity and the workforce that serves it. Analysis of in commuting and out commuting and the change between the 2001 and 2011 Census information shows that approx. 71% of people recorded as working in the borough live within Bedford and of the working population of the Borough approximately 70%

work in the borough. The relatively high level of labour containment is reflected in the 2011 Travel to Work Areas identified by the Office for National Statistics although the Bedford area also includes the northern part of Central Bedfordshire Council's area.

- Looking at the FEMA the strongest economic focus lies within the borough boundaries which supports forecasts being based on the borough's existing and future population.

- 1.6 **Employment Land Supply** is reviewed in Section 6. GVA have reviewed employment sites in the borough accommodating "B" use class employment uses (offices, industrial, warehousing and distribution) and estimate there are some 821.92 ha active employment sites (note this excludes some town centre offices, smaller sites and isolated buildings)
- 1.7 Three key employment sub markets are identified – Bedford Urban Centre, Strategic Road network and Bedford Rural Area.
- 1.8 Existing Sites in each of these sub markets are divided into the following categories for future action :- Protect and Enhance, Protect and Maintain, Monitor and Manage. In addition there is a Protect and Develop category for sites that are as yet undeveloped which will play a central role in attracting additional growth and accommodating business expansion and inward investment.

Protect and Enhance. These are active employment sites which should be protected and where there are opportunities for bringing vacant and as yet undeveloped land on these sites into use to deliver an enhanced offer in terms of the quality and range of stock and improved public realm. The aim should be to seek to maximise role of sites for "B" use class activity – but to support non "B" use class activity that enhances and is ancillary to the core "B" use class activity provided that the use should not detract from the "B" use class uses or significantly dilute the character, focus or operability of the employment sites.

Protect and Maintain These sites are broadly fit for purpose with a large proportion of floorspace likely to meet on-going requirements. They should be protected and maintained in their current form and function. Investment and improvement in stock provision should be encouraged. Non "B" use class activities within the sites should be supported where these are complementary or offer an enhancement to the business area and resisted as far as possible where there may be negative impacts on "B" use class activity.

Monitor and Manage The report identified some sites that may not continue to meet the needs of businesses in the future as they are likely to reach the end of their functional life within the plan period. The report suggests that in the future it may be appropriate to consider removing the employment designation from some of these sites.

Sites no longer in “B” uses - remove employment designation. There are some sites that are no longer in “B” employment uses and it is proposed that if any of these are designated as employment sites in plans, the designation should be removed as the likelihood of them re-entering the “B” use class is minimal.

- 1.9 The **Forecast Demand for jobs and land** is addressed in section 7. Forecasting the number of jobs and future land requirements is not a precise science. The annual East of England Forecasting Model (EEFM) figures for example vary considerably from year to year and tend to reflect the potential for jobs growth depending on the characteristics of existing firms in the borough based on past trends, and there is concern that no adjustment in those forecasts has been made for the under enumeration at the time of the 2011 census. No allowance is made for new firms that may be attracted to the borough. It is clearly important to ensure that there is sufficient land available in the borough for the jobs needed to support housing targets to provide the balance in planning for future jobs and housing and the opportunity to attract new firms to the borough to provide a wider range of jobs.
- 1.10 The Council asked GVA to estimate the need for employment land based on the forecasts of economically active workers prepared by ORS as part of the need to determine the Objectively Assessed Need (OAN) for the borough so that job and housing forecasts are aligned, as well as on the basis of the EEFM job growth figures. The OAN estimated figure of an increase of 15,500 potential workers over the period 2012-2032 (775 jobs/year), and the EEFM 8,680 jobs. The majority of jobs growth, 54-56%, is forecast to be in the non “B” use class uses. (Note. For updated 2016 figures see para 2.2 of Topic Paper)
- 1.11 The study is focussed on making sure that the Council has sufficient employment land supply to deliver jobs in the “B” use classes. GVA have looked at the scale of employment land needed to meet the “B” use class jobs target taking into account likely future losses. This included, at the borough’s request, sensitivity testing to test the impact of delivery at lower occupational and development densities, a lower plot ratio and the impact of a different distribution of employment growth between the “B” use class sectors. To cater for the same number of jobs (6,884) the land supply requirement for “B” use class uses varied between 87 ha and 191 ha depending on the assumptions used on job densities, etc (Note. For updated 2016 figures see para 2.2 of Topic Paper)
- 1.12 The report also recognises that, in addition to the requirements for employment land based on the expectations of population growth and economic trends, there is also a potential role for Bedford to play within the strategic distribution market as it lies at the heart of the Bedford M1 distribution corridor and has strong east/west connections. There is a “supply led” opportunity to achieve higher levels of growth in the logistics sector, and potentially manufacturing. However the extent of identified sites along the M1 corridor from the M25 northwards to Daventry already exceed forecasts of potential demand.

- 1.13 **Sources of Future Supply** are examined in Section 8. An estimate of land supply for “B” use class uses is made taking into account the amount of vacant stock, undeveloped employment sites and the suitability of sites previously allocated through the Allocations and Designations Plan 2013 that have not yet been delivered. Taking these into account it is estimated that the Borough currently had a supply of some 150 ha of employment land in 2015. This excludes opportunities that may exist at Twinwoods, Thurleigh airfield, or on the former Stewartby Brickworks where the situation is uncertain and there are aspirations for other uses. (Note. For updated 2016 figures see para 3.3 of Topic Paper)
- 1.14 **Balancing Demand and Supply** is considered in Section 9. Looking at the 2015 base forecasts of “B” use class land requirements these are well within the supply figures for employment land. Even with additional sensitivity testing most of the outputs are within the available employment land supply. However GVA point the need to have a range of quality sites to suit and out the desirability of some level of headroom being provided through planning policy to allow Bedford to meet its whole employment growth potential across both B and non “B” use classes and to retain capacity for any sites lost to non employment uses over the plan period.
- 1.15 There is also the need to provide a range of sites in qualitative terms as the report advises that the current portfolio is unlikely to provide the appropriate range and choice of accommodation for the expected nature of future demand. In the main this qualitative need is focussed on the ability of the current portfolio to provide a range of large scale, well located sites that are well connected to the trunk road network in order to meet the identified potential of the logistics and distribution market in particular. Any identification of new employment sites should be focussed on ensuring sites can provide a new offer which adds and diversifies the existing portfolio.

Advice on looking for future allocations

- 1.16 GVA advise in para 9.18 that there is currently limited scope to overcome development considerations and costs outside the normal sphere in commercial developments. For example brownfield sites may not be viable in the short to medium term. In looking for new sites where possible sites affected by wider access needs, design restrictions e.g. height, remediation and high costs for servicing utilities as they are away from existing urban areas need to be avoided. Allocations should focus on identifying land that has direct access to the strategic network, principally the A421. To improve attractiveness the Council should be aiming for market visibility and a critical mass, rather than pepper potting sites.
- 1.17 GVA advises that the council should plan for flexibility and that allowed uses in proposed employment areas should be broad to allow a mixture of B1, B2 and B8 uses to be developed. This would enable the borough to accommodate modern hybrid units that incorporate elements of office, research and light manufacturing workshops. Policies would need to provide enough guidance to prevent developments that did not align with intentions.

Review of potential sites submitted through the “Call for Sites”.

- 1.18 The review (see map and table in Section 10 of the GVA Report) was undertaken in the context that any allocation would be justified on qualitative need rather than quantitative requirements. None of the sites the Council asked GVA to appraise fully met GVA’s advice however they considered the sites along the A421 corridor to have the most potential and ability to meet qualitative needs.

List of employment sites by Category. Site Specific Recommendations Section 10

Protect and Enhance

Site reference	Site name
AD14	Land at Cardington Cross, Bedford
AD15	Manton Lane Reservoir, Bedford
AD16	Land west of Manton Lane, Bedford
B007	Cambridge Road Industrial Area
BX02	Twinwoods (Bedford Technology Park)
1	Thurleigh Airfield
2	Marsh Leys
5	Phoenix Park
9	Woburn Rd Industrial Area
21	Stewartby Brickworks
26	Coronation Business Park (Manor Road)

Protect and Develop

Site reference	Site name
AD5	Wixams Northern Expansion
	Wixams
AD11	Land at Medbury Farm
AD12	Land at Bell Farm
AD13	MV Innovation Park Phases 1 and 2
AD17	Land West of B350
	Bedford River Valley Park
	Land West of Kempston(remainder)
BX01	A6 Near Souldrop
	Land North of Bromham Rd

Protect and Maintain

Site reference	Site name
6	Little Barford
8	Colworth Science Pk
B010	Cardington Sheds

BE06	Elstow
BE08	Oakley (Parrotts Builders' Yard)
BE18	Milton Ernest, A6 North of Village
BE20	Milton Ernest, A6 Northern Edge
BE21	Oakley (Adjacent Railway)
BE22	Highfield Park
BE32	Turvey
BE35	Stewartby Village
BE38	Sharnbrook West of Railway
BE44	Riseley, Keysoe Road
BE49	Wilstead Industrial Park
BX03	Sharnbrook East of Railway
BX04	East of Sharnbrook
CFS1	Sackville Lodge Farm, Riseley, MK44 1BS
CFS2	Dean and Shelton Timber Yard (south of B645 - Hargrave)
CFS5	Sunny Farm, Pertenhall Road, Swineshead
CFS6	Monoworld, Rushden Road, Sharnbrook, MK44 1NB
CFS7	Kinsbourne Farm, Bury End, Stagsden, MK42 8TT
CFS8	Firs Farm, West End, Stagsden, MK43 8TB
CFS9	College Farm, Duloe, OE19 5HQ
4	Progress Park/A421
14	Priory Business Park
B005	Meadow Lane
BE43	Chawston (1)
BX06	Chawston (2)
BX08	Wyboston
CFS3	Gordon Low Products, The Lane, Chawston
CFS4	Watson and Brookman, Chawston Lane
10	Murdock Rd
11	Manton Lane
12	Brunel Road
13	Elms Farm
16	Mile Road
B016	Station Road Bus Depot
B019	Melbourne Street between Kingsway & A6
B021	Borough Hall
B040	Woburn Road Police HQ

BX05	Adjacent St John's Station
BE17	Souldrop
23	London Rd Kingfisher Business park, part

Monitor and Manage

Site reference	Site name
BE07	Colmworth
17	r/o Ampthill Road
18	Elstow Road north
20	Camfords Cauldwell
24	College St Kempston
B020	Kingsway (south side)
B022	Ford End Road
B023	Havelock Street
B031	Elstow Road
B042	Ampthill Road (4)
22	Fenlake Ind Estate
BX07	Kingsway (north side)
BO33	Interchange Retail park
BO18	Cardington Rd
AD7	Land East of Eastcotts Rd

No longer in “B” uses. Remove protection/designation (if any)

Site reference	Site name
BE02	Clapham Folly
BE09	Bromham
BE11	Upper Dean
BE15	Harrold (2)
BE36	Stagsden
80	Land East of B530
23	London Road (part)
B045	Brickhill Drive
B043	Barkers Lane
B025	Kempston Road
B003	Riverfield Drive
B002	Land at Cardington
BE13	Great Barford Heavy Plant Sales
BE23	Wymington (north eastern edge)
BE33	Thurleigh Officers mess

Appendix 2

Revised Base Forecast land Requirement (Tables 27/28 EELS)

	Jobs	Floorspace Demand 2015-2035 Sq.m	Allowance for Windfall losses Sq.m	Allowance for churn Sq.m	Change in floorspace Sq.m	Change in land ha.
Office	4,107	49,288	146,800	4,154	200,242	25.0
Industrial	128	4,600	92,880	5,024	102,504	25.6
Warehouse	781	66,37	32,040	9,024	107,439	26.9
Total	5016*					77.5

Assumes 44% of 11,400 jobs are “B” use class jobs

Sensitivity Testing

The following scenarios were tested:-

Sensitivity 1 – Low Density Development

- Office ratio – 0.25
- Warehouse ratio – 0.3

Sensitivity 2 – Average Density Development

- Office ratio – 0.4
- Warehouse ratio – 0.4

Sensitivity 3 – Low Employment Density

- Office employment density – 18sqm per employee

Sensitivity 4 – Low Employment & Development Density

- Office ratio – 0.25

- Warehouse ratio – 0.3
- Office employment density – 18sqm per employee

The impact of these sensitivities on the total land requirement under each scenario is shown in the table below.

Revised Table 31 EELS - Density Sensitivity Tests Output

Base forecast land requirement ha	Sensitivity 1 ha	Sensitivity 2 ha	Sensitivity 3 ha	Sensitivity 4 ha
77.5	141.5	102.5	80.6	151.4

The potential impact of a different distribution of employment growth than used for the EEFM trend based forecasts was also tested to reflect the significant inward investment interest from a range of industrial and distribution businesses who are seeking a base in the area. Based on a 30:30:40 split the amount of land for B8 uses increases significantly giving a base forecast of 112 ha.

Revised Table 34/35 - Sensitivity 5 EELS – different distribution of employment growth

	Jobs	Floorspace Demand 2015-2035 Sq.m	Allowance for Windfall losses Sq.m	Allowance for churn Sq.m	Change in floorspace Sq.m	Change in land ha
Office	4107	18062.4	146800.0	4154.0	169016.4	21.1
Industrial	128	54163.0	92880.0	5024.0	152067.0	38.0
Warehouse	781	170549.0	32040.0	9024.0	211613.0	52.9
Total	5016	242774.4				112.0

If the density assumptions in sensitivity test 4 are applied to the above figures then potentially up to 179.8 ha of employment land could be required.

Revised Table 36 – Sensitivity 6 – different distribution of employment growth and different employment density assumptions.

	Jobs	Floorspace Demand 2015-2035 Sq.m	Allowance for Windfall losses Sq.m	Allowance for churn Sq.m	Change in floorspace Sq.m	Change in land ha
Office	4107	27093.6	146800.0	4154.0	178047.6	71.2
Industrial	128	54163.0	92880.0	5024.0	152067.0	38.0
Warehouse	781	170549.0	32040.0	9024.0	211613.0	70.5
Total	5016	242774.4				179.8

Appendix 3 – Updated List of Employment Sites at November 2016.

Site Name	EELS 2015	2016 situation	Comment
Revision to Table 39	ha	ha	
AD14 Land at Cardington Cross, Bedford Apex Site	7.0	0	Developed Travis Perkins depots 15/01067/MAF
AD15 Manton Lane Reservoir, Bedford	1.6	1.6	16/01829/MAO, permitted subject to S106 Sept for B2, B8 not developed yet. 13,838 sq.m B8
AD16 Land west of Manton Lane, Bedford	6.0	0	16/00111/MAO within new private school site, application pending and site not likely to be available for B class development..
Coronation Brickworks	4.15	0	Expansion to car auction + office permitted 16/02282/MAF
E2 Land south of Cambridge Road	7.55	5.4	Auction house, 15/02512/MAF conditions being discharged u/c and 14/01748/MAF Wallis Way not yet started
Stewartby, Broadmead Rd	2.4	1.9	0.5 ha - IDB offices built, no application as yet for remainder but proposals are being worked up.
	28.7	8.9	
Revision to Table 40			
AD5 Wixams Northern Expansion	5.0	0	now part of larger 50 ha allocation
H14 Wixams	11	3.16	Small area remains, care village/dementia unit on part
Wixams 16/00477/MAO (part of H14)		4.92	B8 employment planning permission granted
AD11 Land at Medbury Farm	31.0	31.0	Landowner advises development partner chosen.
AD12 Land at Bell Farm	18.0	18.0	Planning permission 15/01296/MAO not developed yet up to 750,000 sq.ft B8
AD13 MV Innovation Park Phases 1 and 2	18.0	18.0	Planning application submitted. 17/00666/MAO
AD17 Land West of B530	3.0	3.0	No application yet. Land owner advises development partner chosen.

Bedford River Valley Park	13.6	13.6	No land owners agreement or pre-application discussions yet, but part of wider area.
Land West of Kempston	1.2	0	Area was 2 ha -used for hotel/restaurant, care home pp 16/01888/MAF
Land north of Bromham Rd	3.0	5.0	Outline planning permission granted.
Wixams northern expansion area		50.0	Outline planning permission 15/00466/EIA
New Rd Great Barford 16/01502/MAF		2.4	Permitted 9 units B1, 5 units B8
	103.8	149.08	

Components of Supply

Revised Table 41 EELS

	Total (ha)	Percent
Vacant stock	16.0	9
Intensification (vacant land within existing employment areas)	8.9	5
Vacant land	149.08	86
Total	173.98	