JSP EMPLOYMENT TOPIC PAPER

1. Purpose of this paper

1.1 The West of England Joint Spatial Plan (JSP) Development Plan Document (DPD) sets out a spatial strategy to address the housing, employment and infrastructure needs of the West of England (WoE) sub-region. This paper sets out how the employment needs of the sub-region have been assessed for the purposes of the JSP and how the employment land capacity has been considered, setting out the wider economic context for the JSP and the ‘policy off’ scenario forecasts which underpin the headline employment figures. On the supply-side, it outlines the role of existing city and town centres, and strategic employment locations including the WoE Enterprise Areas and Zones.

2. National Policy and Guidance

2.1 The National Planning Policy Framework (NPPF) expects that statutory planning documents should support sustainable economic growth by planning proactively to meet the development needs of business and an economy fit for the future. In aiming to deliver the vision for the WoE as one of Europe’s fastest growing and most prosperous city regions with the gap between disadvantaged and other communities closed, the Joint Spatial Plan’s objective is to encourage sustainable economic growth; identify strategic locations for investment over the plan period to meet projected needs and identify strategic infrastructure to support investment industries.

2.2 The NPPF states that local planning authorities should have a clear understanding of business needs within the economic markets operating in and across their area. This evidence base should be used to assess the needs for land or floorspace for economic development and the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs.

2.3 The Government’s planning practice guidance sets out the approach local authorities should take to objectively assessing economic development needs. The primary objective of assessing needs is to identify the future quantity of land or floorspace required for economic development uses. This includes both the quantitative and qualitative needs for new development and provides a breakdown of that analysis in terms of quality and location, and to provide an indication of gaps in current land supply.

2.4 The guidance also sets out how local authorities should assess the land availability to identify a future supply of land which is suitable, available and
achievable for economic development uses over the plan period.

3. **Economic Context**

3.1 The WoE is a prosperous city region with growth that has exceeded the national average over the past 15 years. Productivity is the highest of all the core cities and the WoE is a net contributor to the UK economy. The GDP per head for this area is higher than Bordeaux and Barcelona and similar to Hannover.

3.2 At the heart of this success lie some of the region’s core strengths:

- connections to the rest of the UK and the world through motorway, rail, air and sea links help businesses to compete nationally and internationally;
- a highly skilled, talented workforce, many of whom are educated at our world class universities or are attracted by the high-quality jobs on offer. The strong, vibrant and diverse cultural and leisure opportunities coupled with an outstanding natural environment, encourages them to stay;
- home to clusters of world leading sectors e.g. aerospace, financial and professional services, creative and digital, and emerging sectors such as robotics, artificial intelligence (AI), driverless cars and assisted living supported by Smart Cities and Smart Housing.
- Well defined functional economic market area (FEMA) focused around the 3 primary centres of Bristol, Bath and Weston-super-Mare.

3.3 The employment policy in the Joint Spatial Plan sets out the broad jobs aspirations for the region and reconfirms the strategic importance of the Enterprise Zones, Enterprise Areas; City and Town Centres in delivering the majority of the B-use jobs\(^1\) growth up to 2036. The Local Plans which will follow on and support the JSP will set out the more specific, localised details of the opportunities and challenges for employment faced by particular locations and the requirements of specific sectors in those areas.

4. **The Evidence**

4.1 The Joint Spatial Plan identifies an employment growth figure for the plan period 2016-36 of **82,500**. This figure was informed by 2015 Oxford Economics growth forecasts for the WoE. The employment figure stems from the LEP Jobs target which was underpinned by Oxford Economics 2013 forecast adjusted to reflect more recent growth forecasts (2015) and the later time frame of 2016-36.

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\(^1\) B-use jobs are those which require B1a,b,c (Businesses); B2 (General Industry) and B8 (Storage and distribution) floor space.
LEP Jobs Target as set out in the SEP

4.2 The WoE LEP jobs target of 95,000 jobs relates to the period 2010 – 2030. This correlates to the 2013 Oxford Economics medium-high growth scenario with a 1.1% uplift (Table 1).

Table 1: 2013 OE Forecasts 2010-2030

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2010</th>
<th>2030</th>
<th>Change 2010-2030</th>
<th>With 1.1% Uplift</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 High</td>
<td>603,370</td>
<td>722,218</td>
<td>118,848</td>
<td>120,155</td>
</tr>
<tr>
<td>2013 Med-High</td>
<td>603,370</td>
<td>697,336</td>
<td>93,966</td>
<td>95,000</td>
</tr>
<tr>
<td>2013 Baseline</td>
<td>603,370</td>
<td>668,688</td>
<td>65,318</td>
<td>66,036</td>
</tr>
</tbody>
</table>

4.3 Looking at the JSP plan period 2016 – 2036 and applying the 1.1% uplift (table 2) to the medium-high scenario in line with the LEP job target; the jobs aspiration for the plan period would be c. 84,444.

Table 2: 2013 OE Forecasts 2016-2036

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2010</th>
<th>2036</th>
<th>Change 2010-2036</th>
<th>With 1.1% Uplift</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 High</td>
<td>642,063</td>
<td>759,831</td>
<td>117,768</td>
<td>119,063</td>
</tr>
<tr>
<td>2013 Med-High</td>
<td>638,412</td>
<td>721,938</td>
<td>83,526</td>
<td>84,444</td>
</tr>
<tr>
<td>2013 Baseline</td>
<td>634,634</td>
<td>681,195</td>
<td>46,561</td>
<td>47,073</td>
</tr>
</tbody>
</table>

2015 OE Forecasts 2016-2036

4.4 In 2015 the Local Enterprise Partnership refreshed the Oxford Economic Forecasts as the 2013 forecasts were produced at a time when the global economy was still feeling the effects of the 2009 economic crisis. Like the 2013 forecasts the 2015 OE forecasts are ‘policy off’. This means that a top down view of potential employment growth in the UAs has been taken and the forecasts do not take into account local circumstances, policy aspirations, and development sites. The 2015 forecasts take a less optimistic view of growth in the long term than the 2013 scenarios; and reflect a higher level of actual jobs growth between 2010 and 2015.
4.5 At the time of commissioning OE attributed a 50% probability to the baseline scenario being realised; the medium high a 10% probability; and the high scenario 5% probability. Given the probability allocated to each of these scenarios it was concluded that the medium high scenario remained an ambitious jobs aspiration for the region. The 1.1% uplift was also maintained for consistency with the original LEP target.

4.6 The medium-high scenario suggests 81,600 jobs are forecast to be created between 2016-2036. Applying the same 1.1% uplift the revised jobs aspiration for the JSP is 82,500 (Table 3).

**Table 3: 2015 OE Forecasts 2016-2036**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2016</th>
<th>2036</th>
<th>Change 2016-2036</th>
<th>With 1.1% Uplift</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015 High</td>
<td>650,803</td>
<td>765,924</td>
<td>115,121</td>
<td>116,387</td>
</tr>
<tr>
<td>2015 Med-High</td>
<td>649,862</td>
<td>731,470</td>
<td>81,607</td>
<td>82,504</td>
</tr>
<tr>
<td>2015 Baseline</td>
<td>648,650</td>
<td>697,089</td>
<td>48,439</td>
<td>48,971</td>
</tr>
</tbody>
</table>

**Comparison with other forecasts**

4.7 In producing their forecasts OE have taken a view of past employment trends taken from ‘actuals’ to provide a broad split of employment growth by UA. These past trends form the basis of their forecasts which are driven by their view of how the UK economy will perform in the future. As previously stated these are policy off without reference to the local context.

4.8 Table 4 below sets out a series of comparison employment forecasts received as part of the consultation on the emerging JSP. The jobs aspiration for the WoE as set out in the JSP is lower than those produced by Cambridge Econometrics and Experian; there are also marked variations in the employment split between local authorities. The different sets of forecasts all reflect different interpretations of how the economy will perform in the future. Figures for the UA split are illustrative only as top down ‘policy off forecasts are less robust at this level and are based on past trends as illustrated by the wide variation in the UA apportionment. Since the 2015 forecasts were commissioned the decision has been made for the UK to leave the European Union. Whilst the long term economic implications of this decision are dependent on the type of deal made with the EU and other countries most forecasters have assumed slower economic growth in the short and medium
term as a result of business uncertainty restraining investment and hiring decisions.

4.9 The 82,500 jobs broadly correlate to an annual average Gross Value Added (GVA) growth of 2.8 per cent; this compares to an annual average of 3.0 per cent for the UK. However, uncertainty around the terms of the UK’s exit from the EU means that Brexit has led to national growth projections being revised down in the short term. Current independent national growth forecasts as set out by HM Treasury\(^2\) show a consensus view of a downward revision to growth.

Table 4: Comparison of employment forecasts

<table>
<thead>
<tr>
<th>Region</th>
<th>Cambridge Econometrics</th>
<th>Experian</th>
<th>Oxford Economics 2015 med-high</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011-2031</td>
<td>Annual Ave.</td>
<td>% of WE Growth</td>
</tr>
<tr>
<td>B&amp;NES</td>
<td>18,700</td>
<td>904</td>
<td>19</td>
</tr>
<tr>
<td>Bristol</td>
<td>45,479</td>
<td>2,274</td>
<td>45</td>
</tr>
<tr>
<td>N. Som</td>
<td>11,680</td>
<td>584</td>
<td>12</td>
</tr>
<tr>
<td>S. Glos</td>
<td>24,868</td>
<td>1,243</td>
<td>25</td>
</tr>
<tr>
<td>WE</td>
<td>100,097</td>
<td>5,005</td>
<td>100</td>
</tr>
</tbody>
</table>

Source: Experian Economics, Cambridge Econometrics, Oxford Economics

4.10 As well as the changing macro-economic conditions surrounding Brexit; there are also structural changes occurring across sectors as a result of automation, machine learning and digital advancements. The WoE the region has a productive, knowledge based economy with strengths in advanced manufacturing, aerospace, creative and digital; as well as services, such as legal and financial\(^3\). Technological advancements across all sectors suggest growth will be led more by productivity.

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\(^2\) HM Treasury Forecasts for the UK economy, a comparison of independent forecasts September 2017


\(^3\) West of England Economic Report 2017, Metro Dynamics, Poleis and My Local Economy
4.11 Alongside these structural changes there has been a significant increase in the last 5 years of micro-businesses (1-9 employees); which as of 2016 accounted for c. 89% of the business base within the WoE; this is supported by the NESTA report ‘The State of Small Business’ which reports that since 2010, SMEs have created 73% of new private sector jobs. The type and scale of employment land required to accommodate these businesses is very different from that required previously; however, it is important that we maintain a varied portfolio of employment land to accommodate the needs of these businesses now and in the future. Maintaining a flexible portfolio of employment land will allow the WoE to respond to a variety of currently unknown outcomes, and builds resilience into the economy.

4.12 Taking all the above into consideration, the WoE local authorities consider the medium-high Oxford Economic forecasts to still be ambitious; although lower than previously achieved across the region. Accordingly, of the forecasts presented in this section the view is that the Oxford Economic forecasts are the most representative for the following reasons:

- A greater emphasis on productivity led growth. Given that the WoE is close to full employment, it is reasonable to expect a slowing of jobs growth going forward as a result of less slack in the labour market (i.e. the recovery from 2008/9 has been jobs rich, future growth won’t be to the same extent).

- This is also underpinned by technological changes (automation, AI and digital advancements) which will further raise productivity.

- Growth in high value, knowledge based sectors (e.g. professional and tech services), which are driven more by quality rather than quantity of employment.

- Downgrading of UK growth rate as a result of uncertainty around the outcomes of Brexit

**Economic Development Needs Assessment**

4.13 In early 2015 the WoE Authorities commissioned Atkins to produce an Economic Development Needs Assessment (EDNA); this was amended in 2016 to reflect the revised 2015 Oxford Economics Forecasts. A key purpose of the EDNA was to identify the Functional Economic Market Area (FEMA), for this region. This was identified following a range of analysis including travel to work patterns (TTWA), supply chain linkages, transport networks, retail catchments and existing administrative and policy areas. The identification of the FEMA was also informed through consultation with stakeholders working ‘on the ground’.
4.14 On balance the relevant FEMA for the WoE was considered to include all four WoE UAs. Careful consideration was given to whether Bath should be considered a separate FEMA as it is its own Housing Market Area (HMA) and whether North Somerset/Weston should be a separate FEMA based on the fact that it is a standalone TTWA.

4.15 However, the analysis conducted in the study considered that on balance Bath and North Somerset/Weston should be sub-areas within a wider WoE FEMA rather than stand-alone FEMAs. This is because the critical economic mass and key supply chain linkages in the WOE lies within the wider WoE/Bristol city region rather than a fragmented collection of smaller economic sub-markets. It was concluded that fragmenting the WoE into a series of smaller FEMAs could potentially hinder BANES’s and North Somerset’s economic development needs as well as the WoE as a whole.

4.16 A number of sub-areas were identified within the FEMA these are:

- North/East Bristol Fringe;
- Avonmouth/Severnside;
- Central Bath;
- Bristol;
- South Bristol and Fringe;
- M5 Corridor/Weston.

### West of England Indicative FEMA Sub-areas

4.17 The EDNA concluded that there was sufficient employment land at the strategic level of the WoE to meet the demand forecast in both the medium-high and high forecasts (OE 2015). The EDNA showed that supply largely matches demand in some areas, however, there is a relative imbalance in certain other areas. Where appropriate rebalancing is carried out at the FEMA level.
4.18 Based on the EDNA assessment there is sufficient land at the FEMA level to meet the 82,500 jobs ambition set out in the Joint Spatial Plan.

4.19 The EDNA study concluded that:

- Increasing future competition from other areas of England, such as Oxfordshire, Birmingham and the Northern Powerhouse, as well as international competition and the effects of globalisation, mean that the WoE UAs and LEP should be positive and proactive in encouraging economic development in the WoE FEMA through spatial planning and other policy means.

- According to the findings of the EDNA the identified economic development needs of the FEMA to 2036 can be met in the available developable employment space. There is a relative balance in most areas apart from Avonmouth/Severnside where there is an oversupply (see below). This suggests that most existing WoE employment allocations could be retained.

- There is a relative oversupply of land at Avonmouth/Severnside to meet identified WoE FEMA economic development needs. The future spatial policy options for this land include; a) the land could represent a long term ‘reservoir’ of employment land to meet future as yet unidentified needs and accordingly could be retained as employment land at this time; b) the land could be identified for a greater diversity/mix of uses.

- To address relative deprivation and market failure in South Bristol, development schemes (infrastructure, housing and employment) within South Bristol and its fringe could be pursued. This could help challenge the status quo, create a virtuous cycle of investment and stimulate demand for employment uses, thereby helping to create jobs and addressing relative deprivation.

- To fulfill the economic potential of the WoE area and to provide employment that will address areas of relative deprivation it is important that the local workforce has the relevant skills to meet business needs. The EDNA study identified that a relative skills gap exists in the WoE and that this should be addressed through a range of plans and programmes to address the relative skills gap in order to support future economic development in the WoE in the planning period.
Past employment creation

4.20 Monitoring past jobs creation is notoriously difficult due to the continuously changing nature of employment (full time/part time, permanent/fixed term contract/freelance etc); with data sets being subject to methodological differences and all being a snap shot in time. Different data sources all suggest different magnitudes of employment change, however all broadly agree on the geographical distribution across the WoE.

Past Completions and Current Commitments

4.21 This section looks to summarise past employment completions and current commitments by broad geographical area.

B&NES

4.22 Over the 10yr period from 2006/7 to 2015/16 there was an overall net loss of employment space in Bath and North East Somerset of 42,787 sq m. B1 uses remained relative static with an overall small net loss of 206sq m; however there has been a more significant loss in industrial / warehousing floorspace of 42,581sq m.

4.23 City of Bath is the primary location for employment within B&NES and has experienced significant losses of office accommodation due to permitted development rights in the last four years. Replacement stock has been slow to come forward, however with increasing levels of market demand the City is now seeing a steady increase in new or refurbished office accommodation. Between April 2006 and March 2016 there was a net loss of c. 15,800sq m of employment space; of which c.9,900sq m was B1a/b/c space and a further 5,900sq m was B2/B8 industrial and warehouse space.

4.24 The allocation of Bath City Riverside as an Enterprise Zone will see c. 71,540 sq m come forward for B-use class employment primarily B1a/b. (In addition, an estimated 32,810 sq m of non-B use employment space will come forward within the EZ). There is around a further 4,800 sq m of new employment space in the pipeline through current commitments (around 2,800 sq m of which is B1 space).

4.25 Keynsham is a market town within B&NES, located between the two cities of Bath and Bristol. Employment within the town used to be predominately focused on Cadbury’s chocolate factory which closed in 2011 and some light industrial uses.

4.26 Over the 10year period there has been limited change in the employment stock in Keynsham. However, in 2014/15 there was a large loss in industrial space (~32,800 sq m) following the loss of Cadbury’s. There have also been significant gains in office stock. Currently there is 13,500sq m of B1 Space committed and a further 29,800 sq m of B2/B8 industrial and warehouse
space (primarily on land allocated to the East of Keynsham. The allocation of North Keynsham as a SDL will see employment land considered as part of the development of the Local Plan

4.27 The Somer Valley covers the towns and Parishes of Midsomer Norton, Radstock, Westfield, Peasedown and Paulton. Historically the area was characterised by coal mining, printing and manufacturing however these industries have seen significant decline. Over the 10-year period the amount of employment land in the Somer Valley has remained relatively static, with a slight increase of c.550sq m. However, there has been a shift in the type of employment land available with an increase in the amount of B1a/c floorspace (c.5,200sq m); and there has been a decline in B2 industrial uses (c.-4,600sq m).

4.28 The recent allocation of the Somer Valley enterprise zone looks to reverse patterns of out commuting and diversify the type of employment available in this area, some 48,000sq m will be made available for B-use classes. Currently there is c.27,750sq m of B1 space committed in the Somer Valley and 13,790sq m of B2/B8 industrial and warehouse space. These figures exclude potential for an estimated 6,000sq m of non-business use employment floorspace within the EZ.

Bristol

4.29 Over the 10yr period from 2006/7 to 2015/16 there was an overall net gain of employment space in Bristol of 63,052sq m. B1 uses remained relative static with a current overall small gain of 5,917sq m. Over the 10-year period there have been net gains in industrial / warehousing floorspace amounting to around 57,135sq m.

4.30 Bristol City Centre Despite being one of the key locations for employment in the WoE over the last 10years there has been as a net loss of 50,085sq m of employment space in Bristol City Centre. This has primarily been industrial / warehousing floorspace (Use Class B1b, B1c, B2 and B8) with a net loss of 64,106sq m. In the 10-year period 2006/7-2015/16, 191,292sq m of new B1a office floorspace was completed in the city centre. This period also saw the loss of 174,131sq m of city centre office floorspace, predominantly second-hand stock for conversion to residential accommodation, particularly for students. This has resulted in a net gain of 17,161sq m of city centre office floorspace being completed in the period 2006 – 2016. Currently there are commitments amounting to some 58,346sq m of net office space in Bristol City Centre, with losses of -16,146sq m of industrial.

4.31 Avonmouth is one of the primary industrial areas in the WoE located adjacent to Bristol Port. Over the last 10 years there has been a net increase
of 237,524sq m of employment floorspace in Avonmouth (Use classes B1, B2 and B8). This has been primarily from new large format warehousing/distribution premises. An additional 71,345sq m of sui generis industrial development was also completed between 2006/07 and 2015/16, consisting primarily of energy from waste and other energy-related developments. Avonmouth along with neighbouring Severnside in South Gloucestershire was allocated as an Enterprise Area in the City Deal for Bristol (2012). Whilst there are a number of development sites in Avonmouth, most of the employment opportunities will come through the redevelopment and intensification of existing units. As of March 2016 there was 80,164sq m of industry and warehousing (B1b, B1c, B2 and B8, mixed, Sui Generis) committed in Avonmouth.

4.32 **South Bristol** was once home to large scale employers in tobacco, however since these industries have closed jobs creation through other employment opportunities haven’t materialised on the scale needed. Consequently, South Bristol contains some of the most deprived wards in England (Index of Multiple Deprivation). Whilst the root causes of deprivation are more complex than just the availability of jobs, access to employment opportunities are a clear barrier.

4.33 Over the last 10 years there has been a net loss of employment land in South Bristol of 81,647sq m, primarily from the loss of 75,284sq m of industrial floorspace. However, there has been a net gain in new office floorspace, amounting to 9,620sq m. Current commitments suggest a slight net gain of employment space in South Bristol with 6,480sq m office and 2,965sq m industry and warehousing.

4.34 **Rest of Bristol** as in most cities and major urban areas employment land, whilst concentrated in certain locations, can also be found throughout the city. Over the last 10 years there has been a net loss of 47,574sq m throughout the rest of Bristol. Again, this has primarily been as a result of a loss in industrial land.

**North Somerset**

4.35 Over the 10yr period from 2005/6 to 2015/16 there was an overall gain of employment space in North Somerset of 63,291 sq m across the B Use Classes. The overall distribution of this is outlined below under each location, with Weston-super-Mare and Clevedon experiencing an overall loss, and Nailsea and Portishead an overall gain. However the vast majority of the increase in floor space over the period is attributed to commercial development outside of the main towns for example expansion of industrial premises at Yatton.
4.36 There is currently a net supply of 139,025 sq m of B Class employment space consented across North Somerset with small sites experiencing an overall loss of space and large sites accounting for the gain. On large sites gains in B1 use make up over a half of all supply, with B2 making up around a third, and B8 the remaining, smaller component.

4.37 **Weston-super-Mare** is the largest town in North Somerset. A seaside town, employment has traditionally been in services to support the tourism industry, although there was a strong industrial focus centred on the manufacture of helicopters. Over the last 10 years there has been a net loss of B-use employment floorspace, with a loss of c.20,700 sq m. Current consented land at the Weston Villages makes up a large element of supply in the town.

4.38 **Clevedon** is a seafront town largely considered to be a dormitory town; however, there are a number of industrial sites in the area located near to the M5 motorway junction. Since 2006 there has been a marginal loss of employment land in Clevedon equating to a loss of around 4,700 sq m.

4.39 **Nailsea** was once an industrial town focused on coal mining and glass manufacture; however, employment is now focused on service industries such as retail; health; and business administration & support services. Over the last 10 years the amount of B-use employment land in Nailsea has remained relatively static, with a small net gain of c1,650 sq m.

4.40 **Portishead** has seen significant expansion over the last 10 years, whilst this has primarily been housing development there has also been an increase in the quantum of employment floorspace (B-uses) available; with a net increase of approximately 7,100 sq m.

4.41 The most significant increase in employment floorspace has come forward outside of the major settlements of North Somerset. Over the last 10 years there has been a net increase of 80,000 sq m of employment floorspace across the rest of North Somerset.

**South Gloucestershire**

4.42 Over the decade 2006/7 to 2015/16 there was an overall increase in (B-use class) employment space in South Gloucestershire of around 153,200 sq m.

- Office development accounted for around 35,500 sq m,
- Industrial & Warehousing account for 63,700 sq m, and;
- Other ‘mixed’ B-use employment accounted for 54,000 sq m.

These headline figures mask significant volatility between years and difference in gains and losses within individual areas of the district. As of April 2017 monitoring data suggests that there is in the order of approximately
415ha of employment land for B-use class developments in South Gloucestershire.

4.43 **East Fringe** of Bristol is a diverse urban area which includes the new Emersons Green Enterprise Area and established employment areas within the urban areas of Kingswood, Staple Hill, Warmley, Hanham and Longwell Green.

4.44 Over the 10yr period 2006/07 to 2015/16 there was an overall (net) increase of around 11,100sq m. This modest net figure comprises a gain of 68,500 sq m and a loss of 57,500sq m. A large proportion of these ‘gains’ can be attributed to the Emersons Green Enterprise Area.

4.45 However a large proportion of the ‘losses’ were the conversion of traditional employment sites within the existing urban area to residential development. This issue has become particularly acute in localities such as Kingswood and Staple Hill which also have areas of multiple deprivation.

4.46 Monitoring data suggests that (as at April 2017) 25ha of land was committed for employment related development (B-use & mixed B / non B-use classes) in the East Fringe. This equates to around 35ha within the Emersons Green Enterprise Area and committed ‘losses’ of approx. 10ha of existing employment land within the existing urban area (primarily to residential use).

4.47 **North Fringe** The area known as the North Fringe covers the north part of the city of Bristol which falls within South Gloucestershire. This area is a large employment hub, focused around aerospace, defence and business and professional services. This area includes the Filton Enterprise Area. Over the 10yr period from 2006/7 to 2015/16 monitoring data indicates a marginal (net) increase in employment space of around 7,800sq m.

4.48 However, this modest net figure masks significant gains of approx. 229,000sq m and losses of 221,300sq m. The clearance of the former Rolls Royce ‘East-works’ site in 2009/10 accounts for a significant proportion of the ‘losses’), construction work is currently underway on the redevelopment of this site for a mixed-use employment park. It should also be noted that in the decade to 2015/16 around 90,500sq m was developed for ‘non-B use’ employment related uses (including significant retail and D-use class developments at Cribbs Causeway and UWE). Monitoring data suggests that (as at April 2017) around 65ha of land was committed for employment related development (B-use & mixed B / non B-use classes) within the North Fringe. The majority of this land (approx. 60ha) falls within the Filton Enterprise Area.

4.49 **Severnside** is a large industrial area located adjacent to Avonmouth, designated an Enterprise Area as part of the Bristol City Deal. The
Severnside EA covers approx. 646ha (gross) and occupies a strategic location with excellent motorway connections, suitable for warehousing, distribution, industrial and environmental technologies. Monitoring data indicates that, in the 10yr period 2006/07 to 2015/16, there was an increase of approx. 118,300sq m of B-use employment floorspace. An estimated 316ha of land (net) remains available for B-use class employment development (April 2017 Monitoring data).

4.50 **Yate and Chipping Sodbury**: Yate and the adjoining settlement of Chipping Sodbury are located north for the M4, approximately 10 miles north east of Bristol. Employment opportunities are primarily located in a number of trading estates on the western periphery of Yate and within the shopping centres. In the 10yr period 2006/07 to 2015/16, monitoring data suggests that there was a (net) increase of approx. 15,400sq m of B-use employment (comprising a gain of 26,600sq m offset by loss of 11,200sq m). It should also be noted that over the past decade there has been a (net) gain of 24,900sq m of non-B use employment including the Riverside retail development within Yate Town centre (A1 and D use class) and the Yate International Academy (D1 use class).

4.51 Monitoring data suggests that (as at April 2017) around 5ha of land was committed for employment related development (B-use & mixed B / non B-use classes) within the area. The majority of this is in the Yate New Neighbourhood.

4.52 **Thornbury** is a market town in the north of South Gloucestershire with a strong heritage and attractive environment. In the decade 2006/07 to 2015/16 monitoring data suggests a net decrease of approx. 7,100sq m of B-use employment floorspace. Monitoring data suggests that (as at April 2017) around 0.7ha of land was committed for employment related development (B-use & mixed B / non B-use classes) within the area.

4.53 **Rest of South Gloucestershire** in the decade 2006/07 to 2015/16 there was a marginal increase in employment floorspace (all b-uses) of approx. 7,700sq m. It should however be noted that over the past decade there has been a (net) gain of 70,400sq m of non-B use employment, which includes redevelopment of several school sites and the ‘Wild Space’ (Bristol Zoo) development at Hollywood Tower. Monitoring data suggests that (as at April 2017) around 4ha of land was committed for employment related development (B-use / mixed B / non B-use classes) within the area. It should also be noted that an additional 59ha of land is committed for non-B use class employment related purposes (including construction of a surfing centre and construction of operations base for emergency helicopters).
Critic\al Issues

Therefore the critical issues for the JSP to address are:

- Economic prosperity has brought substantial benefits to residents, communities and the environment. However, prosperity has not been shared equally by all communities as there are pockets of deprivation within the sub region.

- The form and function of development in some parts of the West of England has resulted in significant pressure on infrastructure and settlement patterns which are over-reliant on the private car which has inhibited wealth creation and productivity.

5. The Strategy

5.1 In light of the critical economic issues, the Strategic Priority for the JSP is to pursue inclusive economic growth by accommodating the economic growth objectives of the Strategic Economic Plan. Particularly to:

- promote the growth of existing employment centres such as the Enterprise Zones and Enterprise Areas
- ensure more inclusive growth and life chances for all, across the West of England, and improve accessibility to jobs.

5.2 This entails ensuring that there is sufficient land supply to accommodate a net increase in 82,500 jobs by 3036, and that this supply enables inclusive growth, by ensuring opportunities to access employment for both new and existing communities.

5.3 The employment strategy as set out in Policy 4 of the JSP sees strategic employment growth directed to the following locations:

Existing city and strategic town centres:
- Bristol City Centre
- Bath City Centre, and
- Weston-super-Mare Town Centre

Enterprise Zones and Areas
- Temple Quarter Enterprise Zone
- Avonmouth Severnside Enterprise Area
- Filton Enterprise Area
- Emersons Green Enterprise Area
- Bath Riverside Enterprise Area
- Somer Valley Enterprise Area
- Junction 21 Enterprise Area, Weston-super-Mare

Key Strategic infrastructure employment locations
- Bristol Port
- Bristol Airport
- Oldbury Power Station new nuclear build

5.4 Additional employment opportunities are provided throughout the WoE in town, district and local centres, business and industrial estates. Provision for employment growth is also identified in the Strategic Development Locations where appropriate and will be worked through as part of Local Plans reflecting local scale and context.

Existing City and Town Centres

5.5 The City Centres of Bristol and Bath are significant employment centres for the WoE. The allocation of the Temple Quarter Enterprise Zone in Bristol and Bath City Riverside Enterprise Zone helps the city centres to continue to play a key role in the employment market as well as address the issues surrounding the provision of Grade A office space. Whilst the Bath Enterprise Zone covers much of the City Centre; significant employment opportunities extend outside of the Temple Quarter Enterprise Zone into the wider Bristol City centre.

5.6 Weston-super-Mare is the largest town in North Somerset. A seaside town, employment has traditionally been in services to support the tourism industry, although there was a strong industrial focus centred on the manufacture of helicopters. In recent years there has been extensive regeneration projects taking place in the town which have been successful in starting to reverse patterns of out commuting and expand the employment offer in the town over the last 5 years, rates of job growth have surpassed the regional average. Junction 21 Enterprise Zone on the outskirts of Weston-super-Mare is also playing a key role in changing the scale and type of employment on offer available in the town.

5.7 As set out in Policy 4 additional employment opportunities are provided throughout the WoE in town, district and local centres, business and industrial estates. This additional capacity will reflect local need/requirements, with further details on the scale and type of employment to be identified through local plans.
Enterprise Zones and Areas

5.8 The network of Enterprise Zones and Enterprise Areas across the WoE offers unique employment growth opportunities for the region. Table 5 sets out details of each of the EZ/EAs.

Table 5: Enterprise Zone and Area

<table>
<thead>
<tr>
<th>Enterprise Zone / Area</th>
<th>Gross Area of EA (ha) all uses</th>
<th>Estimate of developable employment (B-use) area remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temple Quarter EZ</td>
<td>100</td>
<td>(see note 2 below)</td>
</tr>
<tr>
<td>Bath Riverside and Somer Valley EZ:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bath Riverside</td>
<td>42.68</td>
<td>71,540sq m</td>
</tr>
<tr>
<td>Somer Valley</td>
<td>13.5</td>
<td>48,000sq m</td>
</tr>
<tr>
<td>Avonmouth Severnside EA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avonmouth - Bristol</td>
<td>865.5</td>
<td>(see note 2 below)</td>
</tr>
<tr>
<td>Severnside – South Gloucestershire</td>
<td>646</td>
<td>316 1</td>
</tr>
<tr>
<td>Filton EA</td>
<td>483.5 2</td>
<td>60 3</td>
</tr>
<tr>
<td>Emersons Green EA</td>
<td>101</td>
<td>35</td>
</tr>
<tr>
<td>Junction 21 EA</td>
<td>645</td>
<td>60</td>
</tr>
</tbody>
</table>

1Includes sites for power stations
2Including Brabazon Hanger
3Assume excludes Brabazon

Note 1: Gross area relates to the marketable area of the EZ/EA regardless as to whether it is employment/housing/public realm. Estimate of developable area remaining (Ha) relates to gross area relating to employment land.

Note 2: To quantify the scale of development opportunity in both the Temple Quarter Enterprise Zone and the Bristol component of the Avonmouth-Severnside Enterprise Area would be misleading. Whilst both are already heavily developed, they will feature significant redevelopment opportunities over a 25-30 year lifespan.
5.9 **Temple Quarter Enterprise Zone** was launched in April 2012 and expanded in 2017. This 100ha area has Temple Meads railway station at its core. The area was chosen as an Enterprise Zone for its unique offer – a range of development sites in close proximity to a mainline railway station, a station itself that would soon benefit from major investment in national and suburban rail routes, and in the heart of an already successfully established business district.

During the plan period Temple Meads Station will benefit from investment in the Great Western mainline, with more frequent and faster services to London. Investment will also be made in improved suburban routes, connectivity with other forms of public transport and access and capacity improvements around the station. The University of Bristol is developing its Temple Quarter Enterprise Campus on the former Post Office Sorting Depot site adjacent to the station. A number of other publicly owned development sites are in close proximity, and all have the potential to benefit from these investments.

With excellent connectivity and its proximity to the city centre, Temple Quarter is an ideal location for a mix of city centre uses. The area has capacity to deliver 22,000 new jobs by 2042 and at least 2000 residential units, as well as supporting services including retail and leisure.

5.10 **Bath Riverside and Somer Valley Enterprise Zone.** Bath Riverside EZ has access to a highly skilled workforce. It will deliver around 104,000sqm of employment floorspace including significant new grade A office space to attract Creative, Digital, ICT and Business Services companies. It will create new commercial quarters and a central business district for the city with modern employment floor space in a range of sizes to meet business needs alongside new retail and leisure facilities and over 2,500 residential units.

5.11 The Somer Valley EZ has the potential to deliver 54,000sqm of bespoke employment floor space with the focus on advanced engineering, manufacturing and low carbon end users. It will address the shortage of modern industrial space in B&NES, attracting expanding local companies and businesses relocating to the area who are attracted by the skilled local workforce as well as delivering flexible space to accommodate expanding office based sectors.

5.12 **Avonmouth Severnside Enterprise Area** is an industrial location of internationally significant scale in South Gloucestershire, extending for five miles along the Severn Estuary. The largest brownfield site in Western Europe, Severnside is located between Bristol and the River Severn, immediately adjacent to the M5 and M49 motorways. It consists of two main
areas of economic activity – Avonmouth in the south and Severnside in the north. Avonmouth is the closest port to the main centres of UK population, with 45 million people living within a radius of 300 kilometres.

5.13 The largest employment sectors in Avonmouth/Severnside are logistics and manufacturing. These reflect the area’s attractiveness for large-scale industrial, warehousing, distribution, energy and waste processing uses, in addition to the activities of the port and its storage and distribution facilities and associated industries. The area will benefit from significant forthcoming infrastructure investment including an already approved deep-water container terminal at the port, improvements to provide direct access to strategic road and rail networks, and improved flood defences. An extant permission is in place over a large part of the enterprise area that can expedite development.

5.14 **Filton Enterprise Area** is located in South Gloucestershire and partially in Bristol in the north fringe of Bristol, alongside the A38 in very close proximity to the M4/M5 motorway interchange. This provides direct east-west access to London and Cardiff and north/south access to the Midlands and South West. The Filton Enterprise Area has at its heart a strategic allocation of brownfield employment land located on the old Filton airfield with further capacity for development on a number of surrounding sites.

5.15 Filton has a long and successful history in advanced engineering, aerospace and defence driven by knowledge, innovation, enterprise and excellence which today confirms the position of Filton as a world leader in cutting-edge aerospace and aviation technology. The area is already the established home for a number of world class aerospace, advanced engineering and manufacturing businesses including Airbus, Rolls-Royce and GKN, which already benefit from the unrivalled location, profile, access and highly skilled workforce. Plans are underway at Filton for a new aerospace park and the Bristol Aero Collection displaying the area’s great aviation heritage and a permanent home for the world-famous Concorde 216, the last Concorde to fly.

5.16 Filton Enterprise Area has a focus on aerospace design, research and manufacture, defence, advanced manufacturing, emerging materials technologies, information technology, and microelectronics research and design. In addition to the core business activities, the enterprise area can also support supply chain businesses (supporting the core business activities), financial and business services, data services, sustainable and low carbon energy research, development and manufacturing, and environmental technologies.
5.17 **Emersons Green** Enterprise Area lies alongside the A4174 ring road in South Gloucestershire providing excellent transport access around the eastern fringe of Bristol and directly to the M32 and M4/M5 motorway corridors. It is home to the Bristol and Bath Science Park (BBSP) which includes the highly acclaimed National Composites Centre (NCC). This is a focal point for the coming together of science, innovation, technology and creative/ digital media.

5.18 The NCC is part of the High Value Manufacturing Catapult providing opportunities for dynamic companies and enterprising academics to develop new technologies for the design and manufacture of high-quality composite products. BBSP, part owned by the government, is the central focus of the enterprise area which also includes well established businesses based at the Harlequin and Emerald Business Parks. The remaining extent of this enterprise area is the emerging employment land associated with the adjoining new residential community running alongside the M4 motorway. BBSP provides a focus for science and technology-based companies engaged in research and development and advanced manufacturing.

5.19 The park is designed to support businesses through each stage of their development from early stage companies to established operations and from hot desk facilities though to laboratories and bespoke buildings. With high levels of graduate retention in the WoE, businesses locating at the park can take advantage of the highest concentration of PhD graduates in the UK, coming from the four universities in the WoE.

5.20 **Junction 21 Enterprise Area** has a number of competitive advantages – strong transport links, a diverse and enterprising economy, a highly skilled and motivated talent pool, and significant available land and existing premises. It will create 9,000 new jobs and 6,000 new homes by completion.

5.21 Strategic opportunities around a new Food Innovation Centre and Food Enterprise Zone, the Hive managed workspace for SMEs and micros, North Somerset Enterprise and Technology College (NSETC), Hinkley supply chain and indigenous high growth expansions. Mixture of food innovation & food manufacturing (B1a/b/c/B2). Light industry and office (B1a/c).

**Strategic Development Locations**

5.22 The scale and mix of employment at the strategic development locations identified in the JSP will be set out in Local Plans. Indicative land areas have been identified through the SDL supporting work in addition to general suggestions around the type of employment that could be explored. This will be reviewed through further work to support the allocation of employment land and more detailed policy in due course through Local Plans supported
by further evidence including for example Employment Land Reviews.

Table 6: Strategic Development Locations: Indicative Employment Land
Provision as per Policy 7 of the JSP

<table>
<thead>
<tr>
<th>Strategic Development Location</th>
<th>Indicative employment land provision</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Keynsham</td>
<td>Employment development around main access road: up to 14ha (55,000sq m floorspace)</td>
</tr>
<tr>
<td>Whitchurch</td>
<td>To be determined through the local plan process.</td>
</tr>
<tr>
<td>Brislington</td>
<td>Contains no identified land for employment as in close proximity to existing.</td>
</tr>
<tr>
<td>Backwell</td>
<td>Employment provision and location to be addressed through the local planning process. Assumptions provided here are initial scenarios for testing. North Somerset Council are currently preparing an Employment Land Review that will inform employment planning at the SDLs through the local plan. Likely to be beneficial to consider employment provision in tandem with the Nailsea SDL including potential to provide a new business site well connected to Nailsea and Backwell station and the new MetroBus route. Initial capacity of 10.5ha across both areas to test further through local planning process.</td>
</tr>
<tr>
<td>Nailsea</td>
<td>Employment provision and location to be addressed through the local planning process. Assumptions and suggestions provided here are initial scenarios for testing. North Somerset Council are currently preparing an Employment Land Review that will inform employment planning at the SDLs through the local plan. Compared to other areas of the WoE and in North Somerset, employment land availability is limited in Nailsea. Improvements to highway infrastructure, the station with improved rail frequency, capacity and MetroBus connectivity, may improve the prospects as a business location. Potential for new B1 office park well connected to enhanced Nailsea/ Backwell station with MetroBus connectivity. Along with the Backwell SDL, initial scenarios to test are for around 10.5ha of B Class land, comprising 6.3ha B1a, 4.2ha B1b and B1c, that could translate to around 55125sq m and 22,050sq m respectively</td>
</tr>
<tr>
<td>Strategic Development Location</td>
<td>Indicative employment land provision</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Churchill</td>
<td>Employment provision and location to be addressed through the local planning process. Assumptions and suggestions provided here are initial scenarios for testing. North Somerset Council are currently preparing an Employment Land Review that will inform employment planning at the SDLs through the local plan. This area is on the main A38 corridor with good links to Bristol Airport. Improvements to the transport network in this area may provide opportunities for employment development, including business opportunities associated with the airport. Potential to explore employment land opportunities close to the existing mushroom farm at Stock Lane to create a consolidated business park. Potential for mixed B class employment well connected to new strategic transport routes. Initial scenarios to test are for around 7.4ha of B Class land that could translate to around 40,800sq m.</td>
</tr>
<tr>
<td>Banwell</td>
<td>Employment provision and location to be addressed through the local planning process. Assumptions and suggestions provided here are initial scenarios for testing. North Somerset Council are currently preparing an Employment Land Review that will inform employment planning at the SDLs through the local plan. The area is located close to Weston-super-Mare and the Junction 21 Enterprise Area where there is a significant scale of employment development planned. The role this SDL may play needs to be addressed further in this context. Potential for distribution type businesses well connected to the M5 and the new Banwell Bypass. Initial scenario to test for around 5ha of B Class land that could translate to around 15,000sq m.</td>
</tr>
<tr>
<td>Buckover</td>
<td>The new development will provide a range of employment opportunities including office, SME workspaces, logistics, retail &amp; leisure, care home, health &amp; educational facilities, and hotel to provide local employment opportunities and business eco systems for future residents of Buckover based on garden village principles. (approx. 11ha in total).</td>
</tr>
<tr>
<td>Charfield</td>
<td></td>
</tr>
<tr>
<td>Strategic Development Location</td>
<td>Indicative employment land provision</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td></td>
<td>To support planned levels of housing growth 5ha of employment land will be distributed at appropriate locations within the new development area and at land northwest of Charfield along the B4509 (including the former Leyhill Prison visitors centre and at Elmtree Farm). Non-B use class employment should also be distributed at appropriate locations across the development.</td>
</tr>
<tr>
<td>Coalpit Heath</td>
<td>The new development will incorporate a minimum of 5ha of employment land (traditional B-use classes) and a range of non B-use class employment</td>
</tr>
<tr>
<td>North West &amp; West Yate</td>
<td>West Yate is favoured for a new strategic employment area (approx. 30ha), comprising high quality office opportunities off the Badminton Road and B2/B8 opportunities within the railway land. This land will assist in providing accommodation for new and existing businesses in Yate, including those which may locate from the potential regeneration of the Beeches Industrial Estate, Northwest Yate: Some small-scale employment units for SMEs (e.g. offices, workshops) as part of a high density mixed-use new neighbourhood. Non-B Class employment should also be distributed at appropriate locations across the development</td>
</tr>
<tr>
<td>Thornbury</td>
<td>Initial scenario to test is around 5ha of employment land for SMEs (workshops, logistics) on land at Crossways.</td>
</tr>
</tbody>
</table>

5.23 The Table 7 overleaf sets out how the employment policy set out in the JSP meets the following spatial objectives.
Table 7: Strategic Fit with JSP Priorities

<table>
<thead>
<tr>
<th>Priority</th>
<th>Strategic Fit</th>
</tr>
</thead>
</table>
| To accommodate the economic growth objectives of the LEP Strategic Economic Plan, particularly growth of existing employment centres such as the Enterprise Zones and Enterprise Areas and economic rebalancing to help address inequality and improve accessibility to jobs. | The JSP identifies the strategic B-use employment growth opportunities as being in the existing cities and town centres; the enterprise zones and areas; as well as identifying the important role the Airport and Port play as strategic employers in the region.  
  Bristol City Centre; Bath and Somer Valley Enterprise Zone; Temple Quarter Enterprise Zone; J21 Enterprise Area, Bristol Airport and the Port all play an important role in helping address inequality and access to jobs in the South of the region. This needs to be accompanied by strategic infrastructure to improve physical access to these opportunities.  
  Other mechanisms outside of the remit of the JSP e.g. skills are also needed to help address the inequalities issues in the region and enable the population to access the jobs made available in these locations. |
| To ensure a spatial strategy where new development is properly aligned with infrastructure and maximises opportunities for sustainable and active travel. | The strategic focus on the existing Enterprise Zones and Areas, alongside existing employment centres means that future employment growth will be properly aligned with infrastructure and maximises opportunities for sustainable and active travel.  
  Where appropriate the Strategic Development Locations will provide for employment proportionate to the housing development to be brought forward and with regard to the availability of employment provision in the immediate area. This will be progressed through the allocation of the SDLs in the Local Plans. |
6. **Conclusions**

6.1 Across the WoE, there is sufficient employment land available to meet the jobs ambition of 82,500 by 2036 with appropriate flexibility to cater for churn in the market and changing economic circumstances. It will be the role of Local Plans and the supporting land use monitoring, to undertake more detailed assessments in relation to the overall portfolio of employment land including the scope and scale of non-strategic employment sites in addressing local needs and the needs of specific sectors.

6.2 By focusing the employment strategy on the cities and towns and within the Enterprise Zones and Areas it not only reinforces the importance of these areas in delivering future growth but it also ensures that employment growth occurs in the most sustainable locations and is properly aligned to infrastructure. It will also help those in the most deprived areas of the region access employment opportunities.

6.3 Whilst there are limited strategic employment growth opportunities currently identified within South Bristol, infrastructure improvements to the wider Bristol urban area will provide greater access to employment opportunities elsewhere in the region. Through the Bristol Local Plan further opportunities for employment growth may be identified in South Bristol. The development of Strategic Development Locations through the Local Plans will also seek to address issues of deprivation and access to employment. The regeneration of Weston-super-Mare, alongside the employment offer at J21 has started to and will continue to address the issues of deprivation in this area.

6.4 The evidence set out in this paper and the EDNA has demonstrated that there is a potential demand in some localities which is not necessarily being matched by supply. In some instances, there is limited scope to significantly increase the availability of employment land however through the local plan opportunities to intensify uses on existing sites will be explored. This would require intervention outside of the planning system to make developers/occupiers aware of the opportunities available.

6.5 Changing national economic circumstances requires a flexible portfolio of employment land to be maintained across the WoE to enable the region to build in resilience, allowing the region to respond to the new economic challenges as they arise over the plan period. Other initiatives outside of land use policy will also need to be explored to support and encourage economic growth across the WoE including but not limited to skills support to address the relative skills gap which exists in the WoE.
7. **Monitoring & Review**

7.1 Data on planning completions and commitments of employment uses will continue to be collected by the UAs as of the 1st April every year and monitored through Annual Monitoring Reports. Across the West of England this data will be monitored through the existing Joint Planning Data Officers Group.