

Appendix 1: draft Employment Land Monitor Report 2020/21

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1 Introduction

- 1.1 As part of the preparation of a new Local Development Plan (LDP) for Belfast, the Strategic Planning Policy Statement (SPPS) for NI (September 2015) states that “a system to monitor the take up and loss of land allocated for economic development purposes should be implemented.
- 1.2 The primary purpose of the employment monitor is to inform the formulation of the council’s new LDP. However, it will also help the council identify where a shortfall in potential land supply might exist.
- 1.3 The information collated will allow a clear view of the overall progress in meeting the employment objectives of the emerging development plan and in identifying issues likely to require intervention.
- 1.4 The Planning Act (NI) 2011 requires the council to make an annual report to the Department for Infrastructure outlining the extent to which the objectives set out in the LDP are being achieved. Although the new plan is not yet adopted it is still important to report on the availability and take-up of employment land in advance of its adoption.

2 Methodology

- 2.1 This section will explain the data collection methods used to analyse employment land availability within the district. It provides information relating to employment land data between 01 April 2020 and 31 March 2021. An analysis has been undertaken of all new sites with planning approvals within the periods stated above. The survey identifies and records sites that have been completed, sites that are currently under construction and sites with outstanding planning permission, yet to be implemented. Any existing employment land which was lost to non-employment uses during the monitoring year has also been recorded. Sites identified for the purposes of this report are those that fall within Class B of the Use Classes Order. These are defined as:

| | |
|-------------------|--------------------------|
| Class B1a | General offices |
| Class B1b | Call centres |
| Class B1c | Research and development |
| B2 | Light industry |
| B3 | General industry |
| B4 | Storage and Distribution |
| Mixed Emp* | Mixed employment use |

*Captures schemes that have a mix of employment uses

- 2.2 The process followed to produce the employment land monitor is summarised at Appendix A.
- 2.3 The Monitor presents a register of potential employment land, based on current planning policy designations and planning permissions¹. It is the role of an Urban Capacity Study (UCS) and the Employment Land Review which will be undertaken from time to time, to assess the suitability, availability and achievability of monitored sites to contribute to a viable supply of land.

3 Limitations

- 3.1 The figures included in this document do not include all development. It should therefore be assumed that some refurbishments and other permitted development have been developed and are not included in this document as there is no requirement for such works to be subject to the planning process. Where there has been an application permitted which includes intensification of an existing employment site, i.e. an extension or additional floor to existing employment building, only net additional floorspace is recorded as the site area already exists and would be misrepresentative.
- 3.2 It must also be recognised that the site area for planning applications expressed in hectares has been reduced in some instances to reflect only the site and not the access arrangements as this would have the potential to give misleading results. the results. In a small number of schemes, the floorspace figures were not readily available and estimates of the floorspace gained or lost has been provided based on the existing building footprint and the number of storeys. Due to rounding, numbers presented throughout this report may not add up precisely to the totals provided .
- 3.3 As this is the first year of publication, the data relates only to one year. It is difficult to identify pattern or trends or make conclusions that might be more apparent with average figures calculated over a longer timeframe.

4 Summary Tables

¹ For the purposes of the employment monitor, the draft Belfast Metropolitan Area Plan (BMAP) 2015 is utilised rather than the former Belfast Urban Area Plan (BUAP) 2001. The adopted BMAP was quashed as a result of a judgement in the Court of Appeal delivered on 18 May 2017 and, although this means the BUAP is now the statutory development plan for the area, the draft BMAP, in its most recent, pre-examination, form remains a significant material consideration in future planning decisions. Draft BMAP therefore refers to that which was purported to be adopted and not the pre-examination draft published in 2004.

The following summary tables detail the uptake and loss of employment space for the monitoring period (01 April 2020-31 March 2021). The position at the 31st March 2021 in terms of the remaining supply of vacant employment land and as well as committed floorspace gains through extant planning permission for B use classes balanced against committed losses (extant planning permission for alternative uses) for Belfast district is also included. Please note that there will be minor differences in totals due to computerised rounding up of data.

4.1 Belfast LGD overview 01 April 2020- 31 March 2021

Table 1 provides a breakdown for the gains and losses in employment land over the monitoring year period of 01 April 2020 to 31 March 2021. The total amount of floorspace competed was 2724 sq. metres, almost all of which was use class B1A general offices.

4.2 Belfast LGD extant and under construction overview

Table 2 provides overall totals for schemes where development is on-going and where planning permission remains extant on 31 March 2021. At the 31 March 2021 there were 14 schemes under construction. The completion of all schemes under construction has the potential to deliver approximately 101,545 sq. metres of new floorspace. At the end of March 2021 there were 86 schemes (involving floorspace gain) with planning permission yet to start. The completion of all schemes yet to start has the potential to deliver approximately 509,000 sq. metres of new employment floorspace. Further analysis of the extant permissions demonstrates that approximately 80% (419,000 sq. metres) is B1A general offices.

4.3 Belfast LGD completions (gains) and remaining capacity by location

Table 3 sets out the completions (gains) by location over the period 01 April 2020 to 31 March 2021. It also sets out the remaining capacity by way of extant planning permissions for employment use by location and areas of developable land which are within existing employment locations (that is, land where there is no development under construction or that does not have an extant planning consent). In line with best practice a 40% building to plot ratio was applied to these areas to reflect the servicing, parking and landscaping requirements. As of the 31 March 2021 there is approximately 344,000 sq. metres of vacant land suitable for employment purposes

4.4 Belfast LGD completions (losses) and remaining potential losses by location

Table 4 outlines the completion (losses) by location over the period 01 April 2020 to 31 March 2021. It also sets out the remaining potential losses of employment uses to non-employment uses if all extant planning permissions are realised.

Table 1: Completions for Monitor period 01 April 2020 to 31 March 2021

| | Office (B1A) | | Call centres (B1B) | | R & D (B1C) | | Light industry (B2) | | General Industry (B3) | | Storage & Distribution (B4) | | Total | | |
|--|--------------|----------------|--------------------|----------------|-------------|----------------|---------------------|----------------|-----------------------|----------------|-----------------------------|----------------|------------|----------------|--------------|
| | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | |
| Completed (gains) 01/04/2020- 31/03/2021 | 0.22 | 2,624 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.3 | 100 | 1 | 2,724 |
| Completed (losses) 01/04/2020- 31/03/2021 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Net Change | 0.2 | 2,624 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.3 | 100 | 0.5 | 2,724 |

Table 2: Totals for development on-going, extant permissions (gains & losses)

| | Office (B1A) | | Call centres (B1B) | | R & D (B1C) | | Light industry (B2) | | General Industry (B3) | | Storage & Distribution (B4) | | Mixed Emp | | Vacant employment land | | Total | |
|--|--------------|----------------|--------------------|----------------|-------------|----------------|---------------------|----------------|-----------------------|----------------|-----------------------------|----------------|--------------|----------------|------------------------|----------------|---------------|----------------|
| | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² | Area (Ha) | m ² |
| Development on-going at 31-03-21 | 5.38 | 82,077 | 0 | 0 | 0 | 0 | 0.18 | 874 | 0 | 0 | 0 | 0 | 1.9 | 18,594 | * | * | 7 | 101,545 |
| Not started gains- Full & Outline at 31-03-21 | 66.86 | 419,114 | 0 | 0 | 0.03 | 6,180 | 36.06 | 18,425 | 40 | 35,050 | 9.34 | 18,664 | 40.5 | 12,376 | * | * | 192.79 | 509,809 |
| Sub-total | 72.24 | 501,191 | 0 | 0 | 0.03 | 6180 | 36.24 | 19299 | 40 | 35050 | 9.34 | 18664 | 42.4 | 30970 | * | * | 200 | 611,354 |
| Losses not started at 31.03.31 | 4.12 | 34,734 | 0 | 0 | 0 | 0 | 2.02 | 8,966 | 0.54 | 6,000 | 1.84 | 8,511 | 0.54 | 5,619 | 0.9 | 5,101 | 9.06 | 68,931 |
| Net Total | 68.12 | 466,457 | 0 | 0 | 0.03 | 6,180 | 34.22 | 10,333 | 39.46 | 29,050 | 7.5 | 10,153 | 41.86 | 18,594 | 0.9 | 5,101 | 191.19 | 542,423 |

*For vacant employment land not covered by an existing planning consent please refer to table 3.

Table 3: Completions (gains) and remaining potential gains by location

| Ref No | Location | Completions (sqm) | Remaining Capacity (sqm) | |
|-----------|---|--------------------------|---|-------------------------|
| | | 01-04-2020 to 31-03-2021 | Extant permissions & under construction | Vacant developable land |
| CC | City Centre | 2480 | 300,799 | • |
| ML 08 | Kilwee Industrial Estate, Dunmurry | 0 | 0 | 811 |
| BT 005/05 | Hillview Road | 0 | 4428 | 1,415 |
| BT 005/19 | Ballygomartin Industrial Estate, Ballygomartin Road | 0 | 0 | 1,487 |
| BT 005/10 | Glenbank Business Park, Crumlin Road | 0 | 0 | 11,986 |
| BT 005/25 | North Howard Link | 0 | 0 | 0 |
| BT 005/15 | Kennedy Way | 0 | 4386 | 0 |
| BT 005/04 | Castlereagh Road | 0 | 0 | 2,260 |
| MCH 09 | Prince Regent Road | 0 | 0 | 0 |
| ML 07 | Springbank Industrial Estate | 0 | 0 | 36,343 |
| BT 005/13 | Ravenhill Business Park | 0 | 937 | 0 |
| BT 005/09 | Shore Road/Skegoneill Street | 0 | 0 | 629 |
| BT 004 | Land At Springfield Road (Former Mackie's Site) | 0 | 0 | 65,122 |
| BT 005/11 | Donegall Road | 0 | 0 | 0 |
| BT 005/08 | Duncairn Gardens | 0 | 2256 | 341 |
| BHA 06 | Belfast Harbour | 244 | 58107 | 117,947 |
| BT 005/17 | Westlink Enterprise Centre, Distillery Street | 0 | 0 | 1,280 |
| MCH 10 | Montgomery Road | 0 | 3097 | 0 |
| BT 005/20 | Lanark Way | 0 | 1162 | 2,000 |
| BT 005/07 | York Road Including Jennymount Business Park | 0 | 627 | 0 |
| BT 005/12 | Stockmans Way | 0 | 365 | 0 |
| MCH 11 | Ballygowan Road | 0 | 0 | 0 |
| BT 005/02 | Island Street/Ballymacarrett Road | 0 | 0 | 334 |
| BT 005/21 | Argyle Business Park, Shankill Road | 0 | 874 | 0 |
| BT 005/01 | Newtownards Road/Tamar Steet | 0 | 0 | 0 |
| BT 005/18 | Springfield Road | 0 | 0 | 7,675 |
| BT 005/22 | Agnes Street Industrial Estate | 0 | 0 | 0 |
| BT 005/03 | East Belfast Enterprise Park | 0 | 0 | 0 |
| BT 005/23 | Louden Street/Townsend Street | 0 | 0 | 0 |
| BT 005/16 | Whiterock Industrial Estate, Springfield Road | 0 | 12635 | 9,564 |
| BT 005/26 | Conway Street | 0 | 0 | 0 |
| BT 005/06 | Cambrai Street | 0 | 223 | 0 |

Table 3: Completions (gains) and remaining potential gains by location

| Ref No | Location | Completions (sqm) | Remaining Capacity (sqm) | |
|-----------|--|--------------------------|---|-------------------------|
| | | 01-04-2020 to 31-03-2021 | Extant permissions & under construction | Vacant developable land |
| BT 005/24 | Andrews Mill, Divis Street | 0 | 0 | 0 |
| BT 005/14 | Glen Road | 0 | 57 | 0 |
| BHA 01 | Titanic Quarter | 0 | 95277 | 0 |
| BT 002 | Land At Monagh Bypass / Upper Springfield Road | | 4030 | 0 |
| ML 05 | Seymour Industrial Estate | 0 | 0 | 3,453 |
| BHA04 | D3, Airport Road West | 0 | 0 | 81,981 |
| ROC | Rest of City | 0 | 122094 | 0 |
| | | Total | 611,354 | 344,628 |
| | | Combined total | 955,982 | |

Table 4: Completions (losses) and remaining potential losses by location

| Ref No | Location | Completed losses (sqm) | Remaining potential losses (sqm) |
|-----------|---|--------------------------|-------------------------------------|
| | | 01-04-2020 to 31-03-2021 | Remaining commitments at 31-03-2021 |
| CC | City Centre | 0 | 35,020 |
| ML 08 | Kilwee Industrial Estate, Dunmurry | 0 | 0 |
| BT 005/05 | Hillview Road | 0 | 750 |
| BT 005/19 | Ballygomartin Industrial Estate, Ballygomartin Road | 0 | 0 |
| BT 005/10 | Glenbank Business Park, Crumlin Road | 0 | 0 |
| BT 005/25 | North Howard Link | 0 | 0 |
| BT 005/15 | Kennedy Way | 0 | 0 |
| BT 005/04 | Castlereagh Road | 0 | 0 |
| MCH 09 | Prince Regent Road | 0 | 0 |
| ML 07 | Springbank Industrial Estate | 0 | 0 |
| BT 005/13 | Ravenhill Business Park | 0 | 0 |
| BT 005/09 | Shore Road/Skegoneill Street | 0 | 0 |
| BT 004 | Land At Springfield Road (Former Mackie's Site) | 0 | 0 |
| BT 005/11 | Donegall Road | 0 | 0 |
| BT 005/08 | Duncairn Gardens | 0 | 0 |
| BHA 06 | Belfast Harbour | 0 | 1,221 |
| BT 005/17 | Westlink Enterprise Centre, Distillery Street | 0 | 0 |
| MCH 10 | Montgomery Road | 0 | 0 |
| BT 005/20 | Lanark Way | 0 | 3,880 |
| BT 005/07 | York Road Including Jennymount Business Park | 0 | 0 |
| BT 005/12 | Stockmans Way | 0 | 561 |
| MCH 11 | Ballygowan Road | 0 | 0 |
| BT 005/02 | Island Street/Ballymacarrett Road | 0 | 0 |
| BT 005/21 | Argyle Business Park, Shankill Road | 0 | 0 |
| BT 005/01 | Newtownards Road/Tamar Street | 0 | 0 |
| BT 005/18 | Springfield Road | 0 | 0 |
| BT 005/22 | Agnes Street Industrial Estate | 0 | 0 |
| BT 005/03 | East Belfast Enterprise Park | 0 | 0 |
| BT 005/23 | Louden Street/Townsend Street | 0 | 0 |
| BT 005/16 | Whiterock Industrial Estate, Springfield Road | 0 | 0 |
| BT 005/26 | Conway Street | 0 | 0 |
| BT 005/06 | Cambrai Street | 0 | 1,672 |

Table 4: Completions (losses) and remaining potential losses by location

| | | | |
|---------------|---|---------------------------------|--|
| BT 005/24 | Andrews Mill, Divis Street | 0 | 0 |
| | | Completed losses (sqm) | Remaining potential losses (sqm) |
| Ref No | Location | 01-04-2020 to 31-03-2021 | Remaining commitments at 31-03-2021 |
| BT 002 | Land At Monagh Bypass /. Upper Springfield Road | 0 | 0 |
| ML 05 | Seymour Industrial Estate | 0 | 0 |
| ROC | Rest Of City | 0 | 25,827 |
| | | Total | 68,931 |

Appendix A: Summary Methodology

The employment land monitor measures net gains and losses in employment floorspace within the Belfast City Council area. It provides a snapshot of the amount of land available for employment as of 1st April each year. The Monitor demonstrates the presence of an adequate and continuous supply of employment land in the city and provides evidence to inform the preparation of the Local Development Plan and to make planning decisions. The Monitor presents a register of potential housing land, based on current planning policy designations and planning permissions, rather than an accurate picture of viable housing land.

An Urban Capacity Study will be undertaken from time to time to assess the suitability, availability and achievability of monitored sites to ensure the land required to facilitate the required jobs growth over the plan period is met. An Urban Capacity Study for Belfast was published in March 2018. (https://www.belfastcity.gov.uk/getmedia/3794156e-b2b5-4437-ab36-2f13f2f4f742/DPS028_Evi-05.pdf)

