LIVEABILITY LEEDS

Delivering housing choice for the people of Leeds

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West & North Yorkshire Chamber of Commerce
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West & North Yorkshire Chamber of Commerce
The Ultimate Business Network

LIVEABILITY LEEDS

Delivering housing choice for the people of Leeds

FOREWORD

David Rolinson

Chair of Spawforths and Chair of Leeds Housing Forum, Chamber of Commerce

The right housing development in the right places, with the right supporting infrastructure, brought forward to meet the needs of existing and future communities, will not only be a catalyst for neighbourhood prosperity but is so fundamental to realising the ambitions for city-wide economic growth as set out within the Council's Inclusive Growth Strategy. As members of the housing development community, we have a role to play in ensuring that new housing supports and drives prosperity for all the people of Leeds in line with Leeds City Council's "Strong Economy, Compassionate City" agenda and the Inclusive Growth Strategy. New housing should contribute to creating and sustaining attractive neighbourhoods and to providing access to effective and efficient transport links, quality education and employment opportunities.

This report has been put together by a diverse range of housing professionals, representing all parts of the industry, to set out the concept of Liveable Leeds and the role we can all play in helping to fulfil ambitions to be the Best city in the UK by 2030. We recognise the private housing sector (in all its forms) has a responsibility to work collaboratively with the public sector to ensure Leeds does deliver the quality and quantity of housing it needs.

1 INTRODUCTION

Leeds has a significant national and regional economic role to play as one of the key engines for growth within the Northern Powerhouse. But what is Leeds like as a place to live and is the importance of aligning economic growth and housing delivery fully recognised, not just in terms of the number of new homes but also in respect of creating a "liveable" place?

Leeds is widely recognised as having a buoyant and growing economy, a vibrant city centre, and many of the attributes necessary to ensure a high quality of life. The importance of "inclusive growth" is strongly reinforced by Leeds City Council in many of their strategies but is there a further element that so far has not been recognised – that of the importance of the city being truly 'liveable'?

A growing number of businesses, developers and property professionals are concerned that the focus upon economic growth in Leeds is not being matched by the same ambition towards housing growth, and place-making to ensure that Leeds remains accessible for those choosing to make it their home. Equally, there is recognition that new housing has to contribute and enable the making of great places and that there is a responsibility of the industry as a whole to accept the need to raise standards and quality in equal response to increasing the rates of delivery.

Whilst there is a plethora of "planning processes" that seek to formally align economic and housing growth within a city such as Leeds, the West and North Yorkshire Chamber of Commerce wish to ensure that the voices of their Members are heard in the drive to maintain an ambitious and sustainable level of housing growth and to improve the "liveability" of the wonderful city of Leeds.

In 2016, The West and North Yorkshire Chamber of Commerce established 'Liveability Leeds', a housing forum under the leadership of Dave Rolinson, Chairman of Spawforths. The forum brings together a range of key housing delivery companies and organisations with the express aims of:

- increasing housing delivery to help the city reach its full potential economically; and
- ensuring that new housing meets the aspirations of the people of Leeds

This report is the summary of the findings to date. It aims to ensure that all decision makers who have an influence on housing delivery recognise the need to maintain a high level of ambition not just in terms of the scale of the housing requirement but also in terms of delivering "quality" and "liveability" within Leeds.

This report also aims to add to the debate around both the scale of housing growth and to respond to the wider aspects of inclusive growth.

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2 WHAT IS THE LEEDS HOUSING FORUM?

The Leeds Housing Forum was established by the Chamber in 2016 to explore the constraints to housing delivery within Leeds and to seek to work with Leeds City Council to address and overcome these constraints to increase the delivery of housing.

The Forum comprises key individuals from Housing Associations; Volume Housebuilders; Small and Medium sized Housebuilders; City Centre Developers; Regeneration Specialists; Retirement Home Developers; Lawyers; Agents; Architects, Consultation Specialists and Town Planners.

This is the first time that such a diverse group of key housing delivery specialists in the city have come together with one voice and with a single purpose.

The Forum is committed to increasing housing delivery within Leeds whilst recognising that this growth needs to contribute to the "liveability" of the whole of Leeds and that housing growth on its own will not achieve this. We have therefore identified several key issues that need to be addressed:-

- The appreciation of the benefits of housing delivery for Leeds;
- The need for a "joined up approach" to the delivery of social and physical infrastructure to support new housing;
- The need for partnership working and engagement;
- The need to address planning process constraints; and
- Recognition of public sector funding constraints and the need to address ways to overcome these based upon added value and service.

Liveability Leeds has made significant progress since being established. The Forum meets regularly to exchange ideas and areas of common interest. It engages regularly and positively with Leeds City Council. It has an ongoing dialogue with both Officers and Members of the Council to address key delivery issues. It has:-

- Established a regular discussion forum with the Council to specifically address the issues and concerns of Small and Medium sized Housebuilders who are key to providing further choice and capacity within the housing sector;
- Supported the evolving Build to Rent sector in their engagement with the Council to ensure that market requirements and planning policies are aligned;
- Engaged in the review of the Plans Panel processes undertaken by the Planning Officers Society to ensure that they reflect current good practice;
- Commenced the preparation of a "Planning Protocol" jointly with Leeds City Council to establish good practice for both the development sector and the Council in the processing and handling of planning applications for housing development within Leeds;
- Commissioned research into the socio-economic benefits of housing to ensure that these are fully captured within the Leeds context; and
- Responded to Government consultations on housing and planning matters.

All these ongoing initiatives are towards one common goal – to accelerate housing delivery and enhance the "liveability" of Leeds.

3 RECOGNISING THE IMPORTANCE OF HOUSING TO THE LEEDS ECONOMY?

Leeds is a city of 798,800 people. Typically, people are living longer and Leeds has as many people over 60 as there are under 16 years of age. Leeds also has a higher proportion of young people than the national average, including a large student population.

Leeds is also a diverse city with many cultures, languages, races and faiths. Just over 17 percent of our population is made up of people from black and ethnic-minority communities; 18 percent have a limiting long-term illness or disability; and between six to ten percent identify as lesbian, gay or bisexual.

Leeds is the second largest metropolitan authority in the country and the largest in the north of England. It is a rich and varied place, with a vibrant city centre - well known for its shopping and nightlife; with built-up areas surrounding it; some more rural areas; and several outlying towns and villages.

A unique and distinctive place, the city has both a rich industrial heritage and large areas of open countryside with fantastic green spaces. The city is also in easy reach of two national parks. Regarded as the leading financial and legal centre in the UK outside London, the city is home to some of the largest financial institutions in the country. It has a diverse economy, excellent universities and world-class culture and sport.

Ambitions for growth

There are a number of overlaying strategies which have a bearing on the Leeds economy, with each layer setting out ambitions for job creation at a strategic, geographic level. Strategic Economic Plans, Northern Powerhouse initiatives and Council led strategies all support strong economic growth and all include plans to invest in better transport connectivity. However, the importance of housing to support economic growth is rarely acknowledged in full.

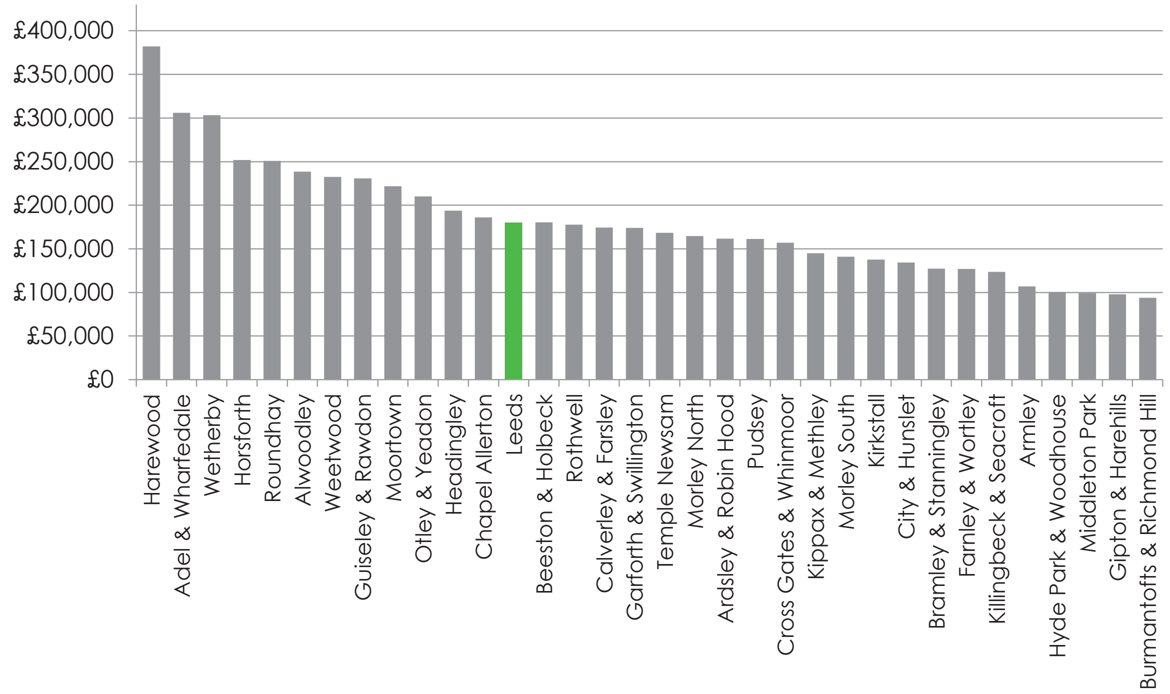
Leeds housing market

Over the twenty years to 2015, the average price of a house in Leeds rose by 206.8%, on a par with Birmingham but lower than all other core cities except Liverpool and Nottingham.

Location	Percentage change, year ending Q4 1995 to year ending Q2 2015
Birmingham	206.8%
Bristol	312.2%
Leeds	206.8%
Liverpool	200.0%
London	357.8%
Manchester	268.0%
Newcastle upon Tyne	208.3%
Nottingham	186.1%
Sheffield	220.93%

Source: ONS, Towns and cities analysis 2016

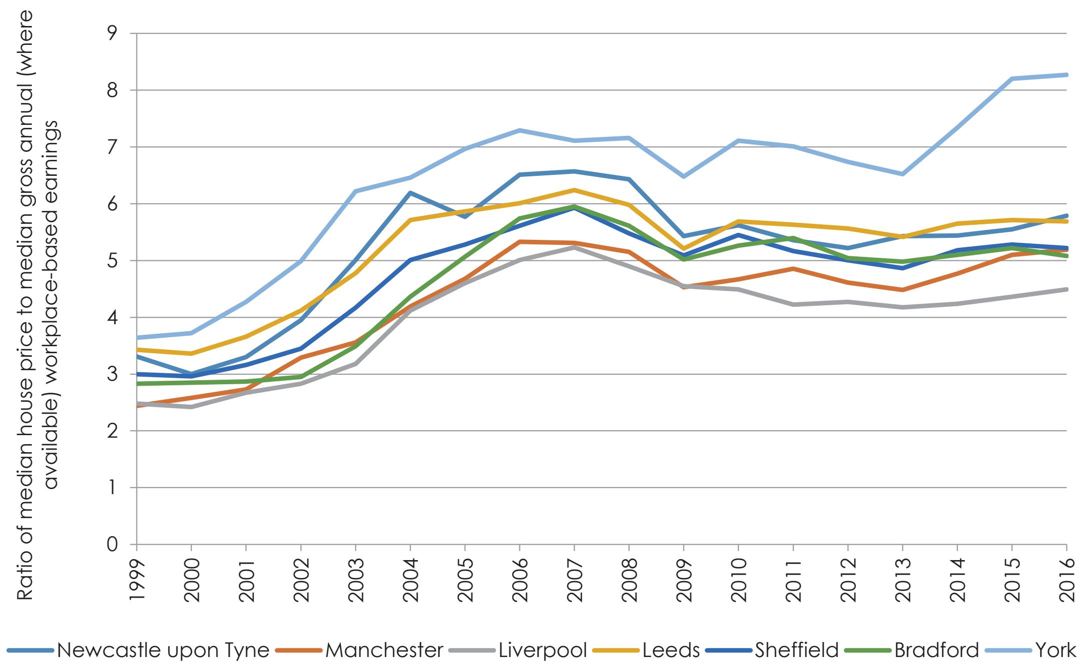
Average house price (all types by sales in 2015)



Source: HM Land Registry (2016)

The average house price in Leeds stands at around £180,000 according to HM Land Registry, meaning the median house price to salary ratio in Leeds is 5.69. Houses are slightly less affordable in the city compared to most other northern cities, a level which is largely unchanged since 2010 and the post-recession recovery.

Housing affordability - Northern cities

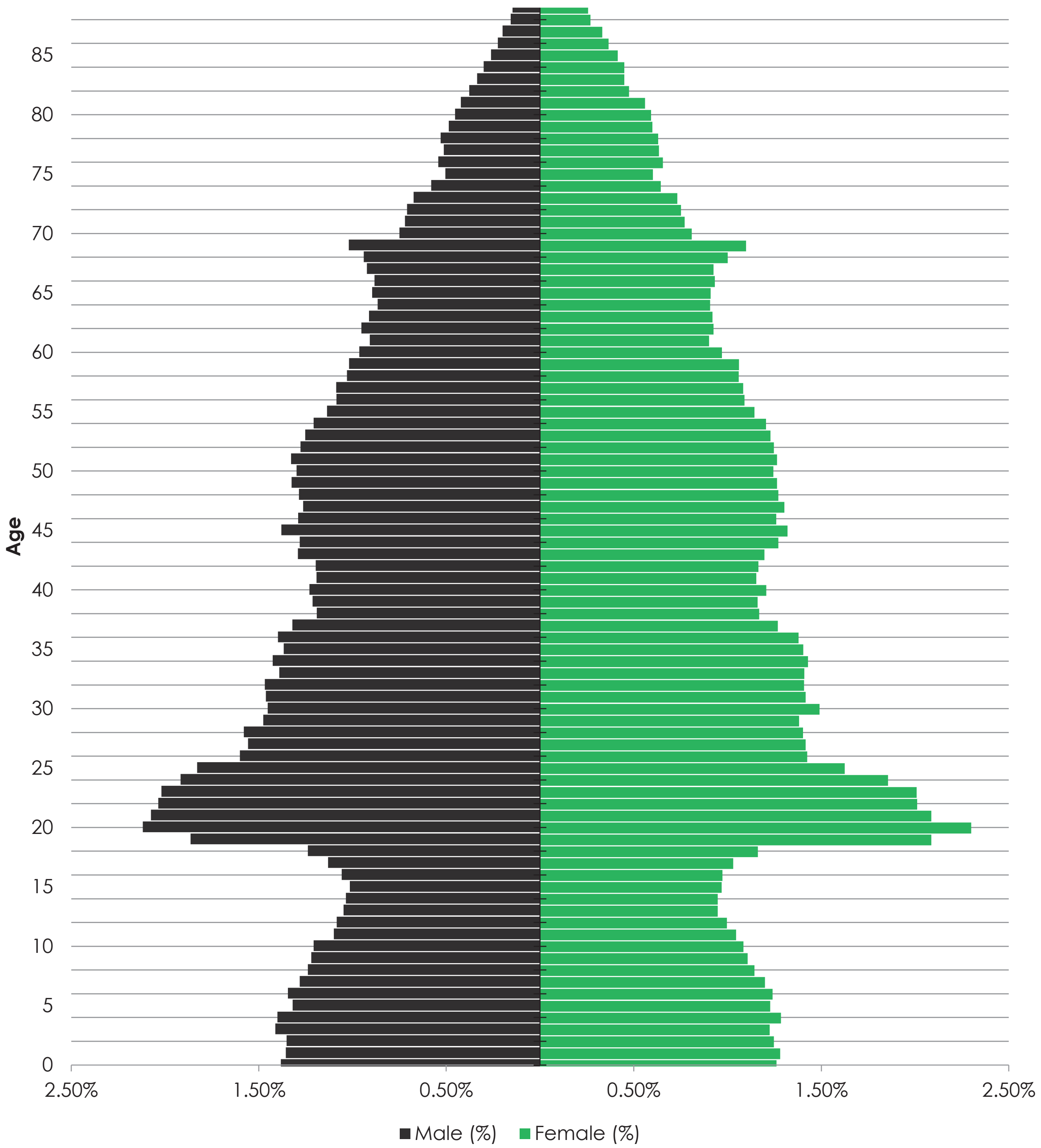


Source: ONS, Towns and cities analysis 2016

Interrelationship between Housing, Skills, Employment and Transport

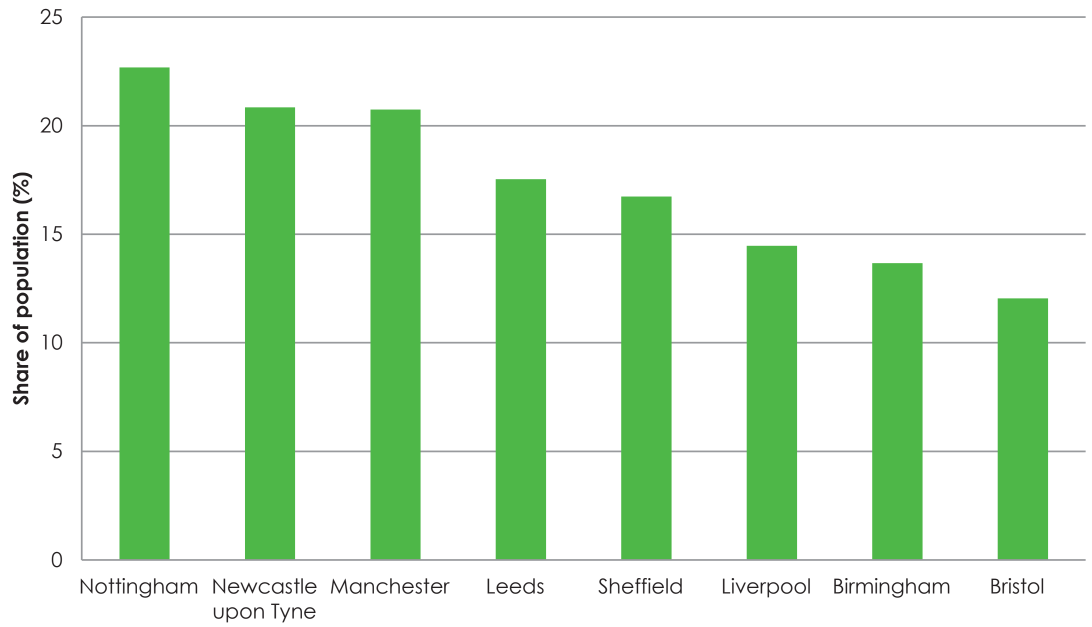
With five Higher Education institutions, Leeds naturally displays a profile typical of a university city with a population bulge from the age of 18 through to the late 20's. Compared to other English core cities, Leeds has a slightly higher than average student population.

Leeds population distribution



Source: Population estimates 2016 (ONS)

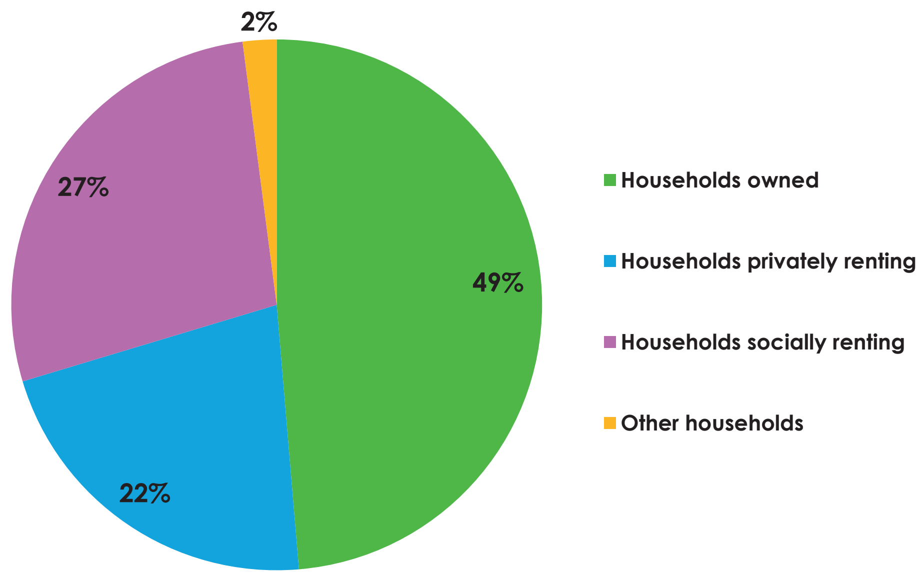
Proportion of full time students (age 16-74)



Source: Towns and Cities in England and Wales, Census 2011, ONS

Recent studies and follow up activity by Centre for Cities and Leeds City Council has identified that, perhaps contrary to popular belief, Leeds is an attractive location for graduates and indeed draws in graduates from other locations, in particular from across the wider Yorkshire & Humber geography. The migration pattern of students and graduates dominates all others. This begs an important question for policy makers, "Do we have an appropriate mix of housing tenure to accommodate this inflow of students and graduates?" And do we have the right type of stock to attract our graduates to stay in the City, to support and in some cases no doubt create the businesses of the future?

Leeds Housing Tenure



Source: Towns and Cities in England and Wales, Census 2011 (ONS)

Travel patterns

Travel to work patterns too, highlight the pressures put on the regional transport network with daily commuter flows into Leeds at high levels.

Source: West Yorkshire Combined Authority

KEY

IN / OUT — Number of people travelling to work in a differentv area each day

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Where are we now?

Leeds has experienced significant economic growth over the last 25 years. New housing development, however, has not kept pace with this. There were 3,306 new and converted homes delivered in 2016/17 – the highest number of newly built homes delivered since the commencement of the Core Strategy (planning blueprint) plan-period (1st April 2012). There has also been a steady increase in new and converted homes since 2014/15. However, whilst this is welcomed, the Core Strategy target has yet to be met and there is already an accumulated under-delivery of 4,476 homes since April 2012.

Year	Core Strategy requirement	New and converted	Empty Homes	Older Person housing	Demolitions	Total	Under delivery
2012/13	3,660	1650	149	29	(27)	1,801	-1,859
2013/14	3,660	2,235	880	86	(6)	3,195	-465
2014/15	3,660	2,076	215	32	(97)	2,226	-1,434
2015/16	3,660	2,516	755	67	(42)	3,296	-364
2016/17	3,660	2,878	437	45	(54)	3,306	-354
Total	18,300	11,355	2,436	259	(226)	13,824	-4,476

This is recognised by the Council:-

“Since 2012, housebuilding in Leeds has not met the Core Strategy (housing) requirement of 3,660 per annum and the Council has recently been adjudged (by the Secretary of State….) not to have a five year land supply” – Report of the Chief Planning Officer to Development Plan Panel (July 2017).

The Council has been particularly focused upon initiatives to deliver brownfield sites and maximise the use of brownfield land. The Council has been pro-active in this regard by:--

- Setting up a Housing Growth Team to identify and implement interventions to stimulate housing growth primarily in areas in need of regeneration and on brownfield land;
- Establishing a Housing Investment Land Strategy (HILS) which identifies surplus brownfield land within the Council’s ownership and which brings together all proposals for market-led or public sector funded housing on such sites into a co-ordinated approach;
- Drawing up a Brownfield Register to identify brownfield sites for development;
- Initiating a Private Sector Acceleration Programme seeking to de-risk sites in conjunction with Homes England and the Private Sector; and
- Nurturing ambitions to build its own homes through Council House Building.

The Council grants about 4,500 planning applications in each year and they indicate that approximately 20,000 have not been implemented. The Forum recognise that several sites are constrained as a result of complications in land ownership, viability or the strength of the housing market, but the Forum also recognise that both the public and private sector have a key collaborative role in seeking to unlock these sites to realise their potential.

As part of its Planning priorities, the Council is now bringing forward a review of the Core Strategy which seeks to reduce the total housing requirement to approximately 51,000 houses down from the current 70,000 target. Many development interests are aligned to argue against this proposal which they see as a weakening of the economic ambitions and resolve of the Council. They indicate that at a time of post Brexit economic uncertainty and a national housing crisis, the Council should be maintaining their current levels of housing growth as a means not only to meet the housing aspirations of the people of Leeds but also to drive regeneration and growth. The Council is also seeking to bring forward a Site Allocations Plan to identify new housing allocations to meet the housing target.

Whilst the Forum is supportive of Leeds desire to get adopted Development Plans in place to give housing developers, communities and infrastructure providers certainty about the scale and location of new housing development, we are concerned that the current proposals are not sufficiently ambitious, not fully aligned with economic ambition and will not deliver the right type of housing in the right locations at the right time and with the right level of services and community infrastructure.

The Forum is supportive of the current Council Initiatives to bring forward housing on brownfield sites but there needs to be further initiatives to:-

- Increase housing provision to align it with economic growth;
- Continue to work collaboratively with the private sector to bring forward "stuck" sites;
- Support the identification of more housing sites to bring forward more new housing outlets to facilitate additional entrants to the housing market;
- Improve the access into new housing forms and tenures for people who struggle to buy or rent in the open market;
- Address the negative perceptions of housing delivery so that it is properly recognised as a key component of the social infrastructure of the city; and
- Consider the role of new technology in enabling delivery, e.g. modular housing, 3D printing

"The current under-delivery of housing within Leeds against the evidential-led annual housing requirements has created housing shortages which have priced many entrants out of the Leeds housing market. There is a desperate shortage of viable new housing sites and land for housebuilding which is a major frustration within the Housebuilding Sector who want to deliver more housing within the city to meet the demands of a growing population and workforce."

Amanda Beresford, Planning Partner, Shulmans LLP.

The Forum consider, therefore, that there needs to be a "step-change" in housing delivery within Leeds not just to keep pace with the rate of household formation, migration and economic growth but also to contribute to the continuing renaissance of the city and its districts.

What about the city centre?

JLL set out in its Residential Forecasts "The New Housing Paradigm", concerns about potentially "strong headwinds" that could buffet the housing market in Leeds going forward. JLL characterise these as:-

- Brexit uncertainty – the UK economy is dependent upon the Brexit settlement which is creating market uncertainty;
- Population growth will ease – the UK population growth is expected to slow from an average addition of 477,000 people per year (2008-2017) to 333,000 per year by 2022;
- Economic growth will be steady – employment growth UK wide is predicted to stall over the next two years but is set to return to the recent trend level of 0.8% pa from 2020;
- Fiscal Policy – UK inflation is presently running well above the Government target of 2% pa but is forecast to moderate to below this level in the five years to 2022.

"All the main cities in Northern England – Manchester, Liverpool and Leeds, have seen resurgent sales and rental markets in recent years. City living has gained strong momentum in Manchester, Liverpool and Leeds over the past three years, and, together with an active student market, has pushed demand in both the sales and lettings markets notably higher. And with housing supply in these city centres severely constrained, prices and rents have soared."

Charles Calvert – JLL.

JLL forecast that "the Northern England economy is set to slightly under-perform the UK economy over the next five years." However, the major northern cities are expected to experience stronger economic growth than both their regional and national averages over the next five years. The Manchester Economy (GVA) is forecast to expand by an average 2.7% pa, well above regional and national averages, whilst Leeds is predicted to expand by 2.0% pa and Liverpool by 1.8% pa, all above the 1.7% pa Northern England average.

Average sales price (2017 % change)	Average rent £pcm (2017 % change)	Build to Rent net yield
2 BEDROOM FLAT	2 BEDROOM FLAT	(Typical yield range)
£185K 2.8%	**£895** 0.0%	**4.75%** 4.50-4.75%

House price growth forecasts

	2018	2019	2020	2021	2022
House price growth forecasts	3.5%	4%	3.5%	3.5%	4%
Rental growth forecasts	3.5%	4%	3.5%	3.5%	3%

Rental growth forecasts

Source: JLL

4 WHAT MAKES A “LIVEABLE CITY”?

Development on its own will not create a great place. Leeds is already a fantastic city in many ways but how could its role be enhanced as a “liveable city”?

What is “liveability”?

There are many definitions of “liveability” but it is generally taken to mean “an assessment of what a place is like to live in, using particular criteria for example, environmental quality, crime and safety, education and health, access to shops and services, recreational facilities and cultural activities”. “Liveability” is a new word .....but in many ways is not new at all!

When we make judgements about places e.g. “I couldn’t live in this street”, “I wouldn’t mind living in this suburb” or “I wish there was a coffee shop close by” – we are assessing / evaluating “liveability”. Liveability, sustainability, walkability, ‘quality of life’, human wellbeing and many other concepts have become a new language of planning better places to live. The quality of our neighbourhoods, towns and cities has a significant impact on our daily lives.

The term “liveable” can be traced back to 1610, meaning “likely to survive” or “conducive to living”. In a highly globalised world, the concept of “liveability” is increasingly important to ensure the survival and healthy growth of a city.

> “The transformation of the City Centre through new apartment development is well established and is now undergoing a further renaissance through the ‘Build to Rent’ sector. Significant and ongoing regeneration schemes are delivering real and long term change to many of Leeds’s poorest communities. These initiatives need to continue and be supported, but they must be matched by wider City housing developments that deliver housing choice within the suburbs and the outlying towns and villages where the ability for many people to access suitable housing is severely constrained by both the amount of new housing and also its price.”
>
> David Rolinson – Chairman of Spawforths.

"Liveability" rankings

The Economist Intelligence Unit sets out a "Global Liveability Ranking" of Cities. The top 10 most liveable Cities in the world for 2017 are seen as being:-

Melbourne, Australia	Vienna, Austria
Vancouver, Canada	Toronto, Canada
Calgary, Canada	Adelaide, Australia
Perth, Australia	Auckland, New Zealand
Helsinki Finland	Hamburg, Germany.

Source: The Economist (2017)

This is based upon an assessment of Stability (crime, conflict and unrest); Healthcare; Culture and the Environment; Education; and Infrastructure (road / rail / air travel / housing / energy / water and telecommunications).

Within England, it is notable that Manchester is ranked 51st. London came 53rd but **Leeds does not even figure in the index** as it is not even recognised as a global city.

What makes a "liveable city"?

The top cities within the Index tend to be mid-sized, in wealthier countries, and with a relatively low population density allowing for a range of recreational activities without leading to high crime levels or overburdened infrastructure. A common factor within the top 10 liveable cities is that all have quality waterfronts, be that coastal or riverside; in addition, all have well developed public transport networks, making car usage less important within core centres.

Outside of the top 10 cities, other mid-range cities within the world are embracing the concept of "liveability". In San Francisco there is a 40 year Plan - "The path to a Liveable City". Its mission is to:-

"Create a San Francisco of great streets and complete neighbourhoods, where walking, bicycling, and transit are the best choices for most trips, where public spaces are beautiful, well-designed, and well-maintained, and where housing is more plentiful and more affordable".

The role of housing is therefore recognised as a fundamental element of a "liveable" city.

How does this compare with the Leeds approach?

Leeds City Council has a stated ambition "by 2030, Leeds will be locally and internationally recognised as the best city in the UK" to improve life for the people of Leeds and make the city a better place. The aims are:-

- Leeds will be fair, open and welcoming.
- Leeds's economy will be prosperous and sustainable.
- All Leeds's communities will be successful.

Leeds Council has published separate City Priority Plans including the "Housing and Regeneration City Priority Plan".

The Leeds 2030 Vision is for Leeds to be the best city in the UK and it sets out the top priorities:-

- good quality, reliable public transport;
- a cleaner, greener city;
- new job opportunities;
- a sense of community spirit;
- good community relations;
- safety; and
- great culture and entertainment.

These priorities are key attributes of achieving a "liveable" city and are fully supported by the Forum but is the role of housing as clearly recognised as it should be within these priorities as otherwise we could undermine the ability for Leeds to become a truly "liveable" city.

> "We recognised very early on in the life of the Housing Forum, that we needed to re-build trust and respect in respect of housing delivery in Leeds. It has become an antagonistic and legalistic process which has lost sight of the benefits of housing for the communities of Leeds. Those who sign up to the Planning Charter will be signing up to a code of good practice, we aim to ensure that the Planning Charter is a way of securing a benchmark level of quality from both the Development industry and the Council towards housing schemes"
>
> David Rolinson – Chairman of Spawforths.

5 MEETING THE HOUSING CHALLENGE

The delivery of sufficient high quality, affordable and accessible housing for all of the citizens of Leeds is key to the ambition to be the best ("liveable") city in UK. Housing on its own is only part of the picture but it can support and facilitate the delivery of places, spaces, environments and wellbeing as well as bricks and mortar, but without bricks and mortar these additional elements are more difficult to achieve.

Since house price growth is expected to be more moderate over the next five years, many of the housing market boosts that we have seen in the recent past, such as an expanding population, low interest rates, previous affordability levels relative to incomes and the escalation of housing as a lifetime investment could now have largely played out. Constraining factors such as affordability (income multiples), heightened mortgage market stringency, less support from the Bank of Mum & Dad (as parents need to use housing wealth for their retirement) are likely to play a more influential role in the Leeds housing market. This is coupled with concerns over the investor landscape generally meaning that external housing market influences on Leeds are likely to become even more significant.

This evolving external market can, however, lead to opportunity and innovation within the Leeds housing market.

Within Leeds, there is a strong and mature housing development community. Many of the national (volume) housebuilders are active within the Leeds market and indicate that they would build more homes within Leeds if the sites were available. Their traditional focus has been upon the mid-market (two to four bedroomed housing) product on urban and suburban sites.

There are also several regional housebuilders within Leeds who compete in the same market. The Small and Medium (SME) sized housebuilders were decimated within the recession of 2007 / 8 and the overall numbers of active SME housebuilders within Leeds reduced significantly. There is now, however, a growing number of SME housebuilders within the Leeds market who will bring forward the smaller sites that the larger housebuilders do not pursue.

There are also many national and regional developers of city centre apartment schemes either as traditional apartment schemes or through the emerging 'Build to Rent' sector. New student schemes are being delivered within Leeds at an increasing rate to meet the dynamic nature of that market.

The registered provider sector within Leeds is becoming increasingly active in identifying sites and delivering new affordable and private market housing.

The Retirement Living sector is also very active within Leeds delivering aged person housing schemes.

This is coupled with innovation in construction techniques through Modern Methods of Construction (MMC) leading to the potential for higher delivery volumes. Construction timeliness can be shortened, quality can be improved to become more uniform and output capacity can become less constrained. The Yorkshire Region is becoming recognised for the capacity and knowledge that it is building around MMC. The investment by Legal & General in a factory to produce up to 3,000 dwellings per year in Sherburn in Elmet along with further investment by companies such as Ilke Homes and Citu show that Yorkshire is becoming a market leader in this approach to system built off site housing manufacturing. Leeds is well placed to capitalise upon this potential.

Whilst there are concerns over the nature and availability of different types of skilled and unskilled labour the expansion of Leeds College of Building will have a key role to play going forward in training the future workforce.

In parallel with new entrants to the housing market and innovation in construction, more development land is required. More public land for housing development needs to be released to compliment that which is to be identified on the Brownfield Register and through the new Site Allocations Plan. Further demand – side encouragement is also required from Government initiatives such as Help to Buy, which was promised more funds recently. Similarly additional national and regional funding of infrastructure is required to improve the congested road network.

The ingredients exist to increase the volumes of housing delivery in Leeds. Within this changing environment, Leeds needs to embrace the new and expanding market entrants alongside the existing housebuilders, to ensure that the benefits of increased housing delivery can be grasped.

> "It is clear that there is a fundamental need for more housing within Leeds to ensure that economic growth can be delivered and that Leeds can play its role as an "Engine for Growth" within the Northern Powerhouse. It is equally clear that any new housing needs to improve housing choice and access to housing for all members of the population of Leeds. This needs to be supported by improving the access to and the quality of existing housing so that Leeds has a fully functioning housing market that meets the aspirations of all"
>
> Phil Roebuck – Partner at Cushman and Wakefield.

Why housing delivery in Leeds should be increased?

Housing demand is a function of population growth, household formation, migration, household size, affordability and economic growth. The precise scale of this housing requirement is always contentious and will be determined through statutory planning processes. There is a statutory requirement to meet the scale of identified need through the planning system but this belies the true benefits of housing delivery. The current Core Strategy requirement is to deliver 70,000 new homes in Leeds over 15 years. Research undertaken by NLP shows that this will lead to:-

- 6,700 temporary construction jobs over that 15 year period;
- Over 10,000 'spin-off' jobs supported per year through the supply chain;
- 536 apprenticeships
- £8.6billion pounds worth of investment into the Leeds Economy;
- £13.4 billion economic output (GVA) equivalent to £892 million per annum;
- £700m of Community Infrastructure and other Planning Contributions;
- £350m of First Occupation Expenditure on goods and services to make a house feel like a home;
- £1.2 billion of total gross resident expenditure from new residents to the area (per annum);
- £612m of New Homes Bonus payments to the Local Authority; and
- £102m of additional Council Tax Revenues (per annum).

The current under-delivery of 4,476 homes since 2012 means that a significant proportion of these socio-economic benefits have not been realised and indeed may never be realised, but it also means that some of the households that have formed since 2012 have not been able to access housing.

In addition to the socio-economic benefits of housing delivery, further research on behalf of the Homebuilders Federation has shown that new housing development directly delivers environmental enhancements through remediation of brownfield land; greenspace and recreational area delivery and refurbishment; additional educational capacity; bio-diversity improvements and new tree planting; and delivery of much needed affordable housing.

At a time of public sector funding cuts and economic uncertainty, it is imperative that the full socio-economic benefits created by new housing are captured for Leeds. Below these headlines are also more localised opportunities that the Forum believes should be embraced:

The city centre as a mixed and vibrant residential community

The city centre of Leeds has changed significantly in the last decade. There was substantial residential development within the city centre between 2002 and 2009 where net completions in the city centre rose to over 1400 in 2007 before crashing down to less than 100 on 2011. City centre living remains popular with little vacancy. Council planning strategies seek to bring forward over 10,000 new homes in the city centre to benefit from its retail and cultural facilities and to ensure that there is ongoing activity at weekends and evenings. The city centre housing offer includes purpose built apartments for sale, student housing, mixed tenure local authority owned housing and niche mixed use regeneration schemes.

The city centre residential market is dynamic and vibrant and has significant potential for further growth as Charles Calvert of JLL notes:-

"The Build to Rent (BTR) market in Leeds is one of the most active across all of the UK's city centres. Demand is being fuelled not only by young professionals but a wider spectrum of renters including more affluent students. Private rental properties account for around 75% of the circa 10,000 city centre residential properties in Leeds, although this stock is almost entirely owned by buy-to-let landlords. However, there are now 3,500 BTR rent units and a further 2,000 private sale units in the short-term development pipeline, which once complete will see the city centre residential footprint significantly increase. Fewer than 1,000 BTR units are under construction in Dandara's 744 unit Sweet Street West and Grainger's 242 unit scheme on the site of the former Yorkshire Post headquarters. The SOYO regeneration scheme, which includes 515 BTR units, will kick start growth in a new area of the city centre. Crucially the new BTR supply coming to the market will satisfy the premium tier of rental demand that is currently completely under served"

While rents remained flat in 2017, JLL expects average rental value growth of 3.5% pa over the next 5 years. This forecast makes Leeds the stand out market to watch for rental growth between 2018 and 2022. This compares to the average price of a two bedroom flat in Leeds which increased by 2.8% in 2017 to £185,000. JLL expect stronger price growth in Leeds over the next five years, at an average of 3.7% pa - second only to Manchester in terms of growth expectations. They consider that there is a strong appetite for high quality owner occupier stock in Leeds and that demand will significantly outstrip available supply over the next five years.

Traditionally, the concept of city living has centred on the apartment model, which enables high density development, where land is scarce and values are prohibitive. Apartments typically provide 1 and 2 bedroom accommodation and suit young professionals, singles or couples, who want to take advantage of the way of life offered in the city centre. The provision of more traditional housing close to the city centre was relatively un-tested (with the exception of Miller Homes scheme H2010 on Yarn Street). However more recently, Strata Homes have undertaken a very successful scheme on Otter Island where they have developed 113 predominantly 2 bedroom townhouses, which have proved to be highly sought after from the young professional market that have purchased here moving from rented apartments in the city centre.

Citu are also delivering more traditional housing in their Climate Innovation District, the first phase of which will be on East Street, delivering some 516 adaptable modular constructed homes which will benefit the environment and continue to provide an alternative to more traditional city centre accommodation.

Private rental properties account for around 75% of the existing residential stock in the city centre, however demand for rented accommodation continues to be strong. As is the trend across the country many of the developments in the Leeds city centre pipeline are to be delivered as Build to Rent (BTR). Demand for high quality well managed apartment stock will continue and as these schemes are delivered, the competition will increase encouraging existing landlords to update their properties. In addition to the BTR, there is latent demand for high quality apartments to be delivered for sale on the open market. Would-be apartment purchasers at the higher end of the spectrum are put off by the lack of quality of the existing dated stock and often revert to more traditional homes in the suburbs in frustration.

Council planning policies recognise that the role of affordable housing in the centre of Leeds will ensure that there is a broad range of residents living in the city consistent with the desire for a cohesive community that develops over time. Affordable housing tenure models associated with BTR schemes continue to evolve within Leeds and ongoing dialogue needs to be maintained between developers and the Council to ensure that they can be viably delivered.

New housing within the city centre also has a role to play in supporting social and cultural facilities. Leeds city centre currently lacks a meaningful public open greenspace akin to those in other cities such London or New York, and the city centre would benefit from a well maintained park which would provide a peaceful oasis for workers and residents within the city. Exciting proposals at the former Tetley Brewery site as part of the South Bank development could go some way to addressing this deficit. The provision of a well-managed and safe environment could provide a lure to families to move into the city whose numbers are currently somewhat limited.

Children's education is a key issue in housing choice. It is well documented that parents will move to a postcode which is within the catchment of a top performing school. The Ofsted Outstanding, Ruth Gorse Academy has opened but we need enhanced primary school provision also as widely recognised.

New housing development within the city centre needs however to be part of a co-ordinated approach to the future of the city centre as a whole, one which recognises its regional importance as a place to work and to shop. The redevelopment of secondary office space through Permitted Development Rights has provided the majority of the much needed residential apartments that have been delivered in the city since the recession. Where this space is no longer fit for purpose, the re-use of these buildings, some of which are historically important, is an important way in which to preserve buildings and whole areas of the city which could stagnate unless sensitive redevelopment takes place. New housing can also be accommodated above existing retail units to make positive re-use of upper floors. This too will add to the vitality of the city centre.

The Forum is fully supportive of increasing housing delivery within the city centre and is working with the Council to address delivery constraints especially in the emerging 'Build to Rent' market. Despite the opportunities afforded by the city centre, it cannot however meet all aspects of housing demand within a city such as Leeds. The nature of the housing offer; its tenure; price and geographic location mean that it remains a particular element of the wider Leeds housing market. We consider that realism needs to be maintained over the scale and speed of delivery within the city centre and that independent research should be commissioned into the scale and nature of the Leeds city centre housing market to ensure that there is not an over-reliance upon the city centre to meet the wider housing needs of the city.

Regenerated communities

Inclusive growth is key to a successful place. Leeds City Council is leading a series of brownfield and regeneration initiatives through their Housing Growth Team and Housing Investment Land Strategy (HILS) and these initiatives are fully supported by members of the Forum. Development of new housing within these areas can make a real difference for the communities affected. Existing housebuilders from within the region are on site delivering many estate renewal schemes. Keepmoat and Strata are working in partnership with the Council to deliver 917 new houses in Seacroft, Halton Moor and Osmondthorpe.

One of the most recent innovations in the housing market has been the increased new housing delivery from the Registered Provider sector that are now undertaking a new wave of housebuilding following recent Government reforms of their financial and governance structure. These Registered Providers will build not only the "affordable" housing being brought forward as part of a wider housing scheme but are now also bringing forward both fully affordable housing schemes and also bringing forward their own private market dwellings.

> "Delivery of new houses of all tenures is now a core part of our business strategy. We are extremely keen to work in partnership with local communities and local authorities to increase housing delivery and to support and regenerate communities."
>
> Neil Terrett – Land Director Strata Homes

The Forum recognises that the Council also has ambitions to build its own homes through direct Council House Building. Other Local Authorities are bringing forward Joint Venture housing delivery vehicles such as "Bridge Homes" in Wakefield which is a joint venture between Wakefield Council and WDH (Registered Provider). The Forum supports these initiatives and recognises the considerable role that public sector housebuilding could add to housing delivery in Leeds.

Elsewhere in the country there are many examples of innovative housing models coming forward within regeneration areas to address housing shortages directly or through freeing up existing housing stock. Fortior Homes is a housing company wholly owned by Stoke-on-Trent City Council but who work closely with Homes England. Since its establishment, Fortior Homes has facilitated circa 1200 new homes currently on site or in the pipeline on stalled sites across the city.

The Forum recognises that regeneration schemes have a significant role to play in delivering inclusive growth and in ensuring that all the people of Leeds share in its economic success. These schemes also ensure that the benefits of new housing can be spread across the city. The Forum supports the delivery of new housing within regeneration areas. The nature of the regeneration areas, often within the Inner Areas of Leeds, means that new housing provision there will not be able to address the full range of new housing requirements necessary to meet the economic ambitions of the wider city.

> "Working with Genr8, our brief was to develop a scheme for circa 300 build to rent (BTR) apartments within Smithfield in Stoke which were aimed directly at young singles and couples in need of affordable accommodation within Stoke. These high quality apartments will unlock significant quantities of suitable family housing stock currently occupied on an HMO basis. The first 151 apartments are currently out to tender."
>
> Peter Cartwright – Cartwright Pickard Architects

Suburban consolidation and settlement expansion

The housing needs of Leeds cannot be met solely within the city centre and through regeneration initiatives. The Leeds housing market includes significant suburban areas where the demand for family housing remains high and the affordability of housing is often difficult. The availability of new housing sites within these areas can be constrained by the planning system and the Council are moving forward with the Site Allocations Plan to seek to identify new housing allocations. Many commentators consider however that the proportion of new housing that is being supported by the Site Allocations Plan within these areas is too low to meet the effective demand and hence that a shortage of new housing outlets in these areas will continue going forward.

The statutory planning processes associated with the Core Strategy revisions and the Site Allocations Plan will determine the scale and disposition of new housing allocations within the City, however the Forum is keen to ensure that this process ensures that new housing opportunities meet all aspects of housing demand and that planning policies recognise the functionality of the housing market to ensure that any policies that seek to steer the housing market towards brownfield regeneration do so in tandem with the need to continue and accelerate delivery of new family housing within suburban and outlying towns and settlements.

The Housing Forum recognises that the Council have granted a significant amount of planning permissions which have not been brought forward due to viability or land ownership reasons or which are coming forward but due to their size, the timescales for housing completion are lengthy. The Housing Forum wishes to continue to work collaboratively with the Council to find innovative ways to unlock this potential. Perceptions currently exist that several housebuilders "land bank" to distort the housing market through restricting housing supply to increase house prices. The housebuilders within Leeds have a strong track record of housing delivery on viable sites that they own and control. Land banking does not accord with their delivery model due to high holding cost.

> "It is important to ensure that the right homes get built in the right locations. The city centre and Inner Areas of Leeds can deliver a certain type of product, especially one and two bedroom properties but often lack private garden areas. There is a huge demand for a mix of housing, particularly family housing, in suburban areas of Leeds and its outlying towns and larger settlements. Housing choice and meeting all aspects of demand is key to a proper functioning housing market."
>
> Mark Jones – Head of Planning – Barratt & David Wilson Homes.

Work undertaken by the Land Promoters and Developers Federation entitled "Realising Potential" (March 2018) demonstrates that due to the nature of housing delivery constraints, it is a necessary part of the housing market that there will be a significantly increased amount of housing permissions to provide a "pipeline" of actual housing delivery. Notwithstanding this, the Forum will continue to seek to address this concern and to work collaboratively with the Council to overcome any viability or delivery constraints. Emerging Government guidance through the revised National Planning Policy Framework should help to address such housing delivery issues.

Specialist housing

Simply increasing the housing delivery numbers does not necessarily meet specialist housing needs nor does it result in a "liveable" place. Our Society is aging and this is acutely the case in Leeds. We require specialist forms of housing to suit aged persons as well as other specialist housing to meet the needs of the most vulnerable. Planning policies going forward will need to ensure that suitable sites are identified to meet these specialist needs to ensure that everyone in society can benefit from the growth of Leeds.

A community conversation

Historically we've not built enough homes and this has had a knock-on effect on home ownership levels and affordability. Yet, despite people in Leeds struggling to get on the housing ladder new housing developments are often faced with local opposition. There are some excellent examples of developers and housebuilders engaging with local communities around proposed new housing sites, however this isn't always the case.

New housing development can often be perceived as being imposed upon communities who have no "say" in its location, form or the social and physical infrastructure that it can support. This can result in a "them and us" situation arising where a community feels that it is not being heard and where a developer feels that their new housing development is being unfairly criticised. This does not have to be the case, and the Forum recognises and supports the need for a renewed approach to housing development in Leeds.

> "If we want local communities to accept new housing we need to change the nature of the conversation. We need to talk to local communities at an early stage to understand their needs and aspirations. The industry needs to deliver real housing choice that matches the way that people want to live. We need to build quality places and streets — real communities that people can feel a part of."
>
> Rebecca Eatwell – Managing Partner of Newgate

The Forum fully recognises that new housing needs to be delivered in parallel with improved community, social and physical infrastructure.

New housing development delivered in isolation can add to existing problems for over-stretched services and congested roads and this can lead to community resentment. It is not enough to consult local communities on a scheme where there is little that can be changed. Giving communities real choices and getting their input on what local infrastructure is required can help create a sense of ownership and ultimately creates better development. Liveability is simple – it's about creating places that people want to live in. We need a conversation with the community and key stakeholders about what this means to them so that the places of the future are truly liveable.

> "Our new housing scheme within Boston Spa was initially resisted by the community and the Council but since it has been completed, it has achieved both design awards and a renewed confidence and vibrancy to the high street"
>
> Mark Swann – Regional Land Director of Taylor Wimpey.

Partnership working and collaboration

There is no single "silver bullet" to increase housing delivery as no individual company or organisation can achieve it alone. The Forum is committed to working collaboratively with Leeds City Council and other key stakeholders to address and overcome the housing delivery constraints. We are drawing up a "Planning Charter" jointly with Leeds City Council that will set out a planning protocol for delivery of growth in Leeds. A previous "Leeds City Region Planning Charter for Major Investment Proposals" in September 2015 is not well known or understood and the Forum want to re-focus upon housing delivery through "Charter Pledges" relating to how the Local Planning Authority and Developers will work together to ensure that housing proposals will be dealt with in an efficient and effective way throughout the City. This Planning Charter will set out a standard of process and activity and will in no way undermine the democratic process of consideration of each planning application.

Partnership working is also about critical challenge. The Forum will continue to challenge and be a "critical friend" where it perceives that improvements can be made to housing delivery and likewise, members of the Forum recognise that they too must embrace constructive criticism to enhance delivery and quality.

> "We recognised very early on in the life of the Forum, that we needed to re-build trust and respect with regard to housing delivery in Leeds. It has become an antagonistic and legalistic process which has lost sight of the benefits of housing for the communities of Leeds. Those who sign up to the Planning Charter will be signing up to a code of good practice, we aim to ensure that the Planning Charter is a way of securing a benchmark level of quality from both the Development industry and the Council towards housing schemes"
>
> David Rolinson – Chairman of Spawforths.

Delivery of Infrastructure

A key aspect of world-wide "Liveable cities" is a mass rapid transport system. Such a system, whether it is light or heavy rail, water related or tram, is a key component of such a city. Leeds is one of the largest cities in Europe without a mass rapid transport system. The impacts of this are felt by residents of Leeds every day. It also has a significant adverse impact upon business growth, graduate retention, quality of life, health and Leeds environment. The opportunity afforded by HS2 coming into Leeds needs to be matched not only by east / west linkages through Northern Powerhouse Rail but also by the early delivery of a mass rapid transport system. Leeds has recently benefited from additions to the heavy rail station network at Apperley Bridge and Kirkstall as well as further Park & Ride schemes and these are welcomed.

Further housing growth especially in areas of highest housing demand should however continue to be aligned with improvements to the public transport network. Housing developers regularly contribute to improvements to the local bus network and highway upgrades as part of their planning permissions for new housing schemes. The major East Leeds Extension will deliver a new orbital highway route and the East Otley scheme will deliver an Otley Eastern Bypass, each of these will facilitate and be supported by new housing development.

Proposed changes to the planning system in the form of "Strategic Infrastructure Tariffs" will allow Combined Authorities to set out the case for a tariff on new development to fund the delivery of key infrastructure. The Forum is open to further dialogue on this matter to seek to ensure that new transport infrastructure can be fully supported by and facilitated by new housing development.

“in my experience of being involved in delivering large scale transport initiatives, this is one of the most productive times to be having a conversation with both Government and regional bodies to make the case for a joined up approach to housing and infrastructure delivery.”

Adrian Kemp, Director, WSP

As well as physical infrastructure, communities need to see the timely delivery of social and community infrastructure alongside housing developments. Key in this area is the role of education. Financial and / or land contributions towards improvements to locals schools are fully embedded into the planning process and housing developers recognise the benefits of good quality schooling not only for community cohesion but also to establish the location as an attractive place to live. Significant financial contributions are made by housebuilders to new educational facilities and more transparency is required through the planning process to demonstrate how and when these contributions are spent.

New housing development can be catalyst for community facilities both directly through planning contributions (often matched by other public sector funding sources) but also through increased local patronage and expenditure to sustain existing under-utilised facilities. This can be especially the case in rural areas and smaller settlements within Leeds where existing community facilities (including bus routes) are barely viable.

The Forum recognises that the alignment of physical and social infrastructure with new housing development needs to be improved but this is best facilitated by public sector bodies such as the City Council or Homes England, often with a joint public / private sector case made to Government. Devolution of powers for funding and choice for the delivery of infrastructure should be a positive step in the right direction.

A Place-making and Quality Place Agenda

A key facet of the “liveability” agenda is that of place-making and shaping. The “liveability” agenda recognises that people want to live within communities and places rather than houses and flat blocks. The ‘Build to Rent’ approach of providing facilities and shared spaces is breaking down many of the barriers to community building within the city centre. Further shared facilities within the city centre such as a city centre park and a renewed and attractive Waterfront will drive forward a place shaping agenda to support city centre community living. In regeneration areas, estate renewal, community capacity building and public realm improvements are delivering attractive places and spaces to address negative perceptions and fear of crime. In suburban and outlying towns and larger settlements, a renewed focus upon greenspace, green infrastructure and housing mix is bringing forward mixed and balanced communities. More needs, however, to be done to ensure that “quality” is a key component of new housing everywhere in Leeds so that local distinctiveness is reinforced and design innovation is embraced.

COMMUNITY-LED HOUSING (CLH)

CLH involves individual citizens and groups getting involved in creating and managing their own housing. There is a strong history of activity in Leeds and appetite to achieve more. There are a range of approaches to CLH, including renovation of empty homes and new build, co-operatives and co-housing structures, community land trusts, custom- and self-build. Central government is increasing its support for CLH, and Leeds City Council is among the most proactive local authorities in helping CLH flourish.

Case study: Climate Innovation District (CID)

Leeds Community Homes (LCH) has emerged as a coalition and umbrella body of all of the CLH groups in Leeds. LCH was approached by Citu, an exciting developer specialising in low carbon housing, to be a partner on the CID development in the centre of Leeds. In an innovative and replicable deal, Leeds City Council (LCC) has supported the partnership and enabled LCH to be the Section 106 affordable homes partner on the Citu CID scheme. LCH has raised finance to purchase 16 homes which will be permanently affordable.

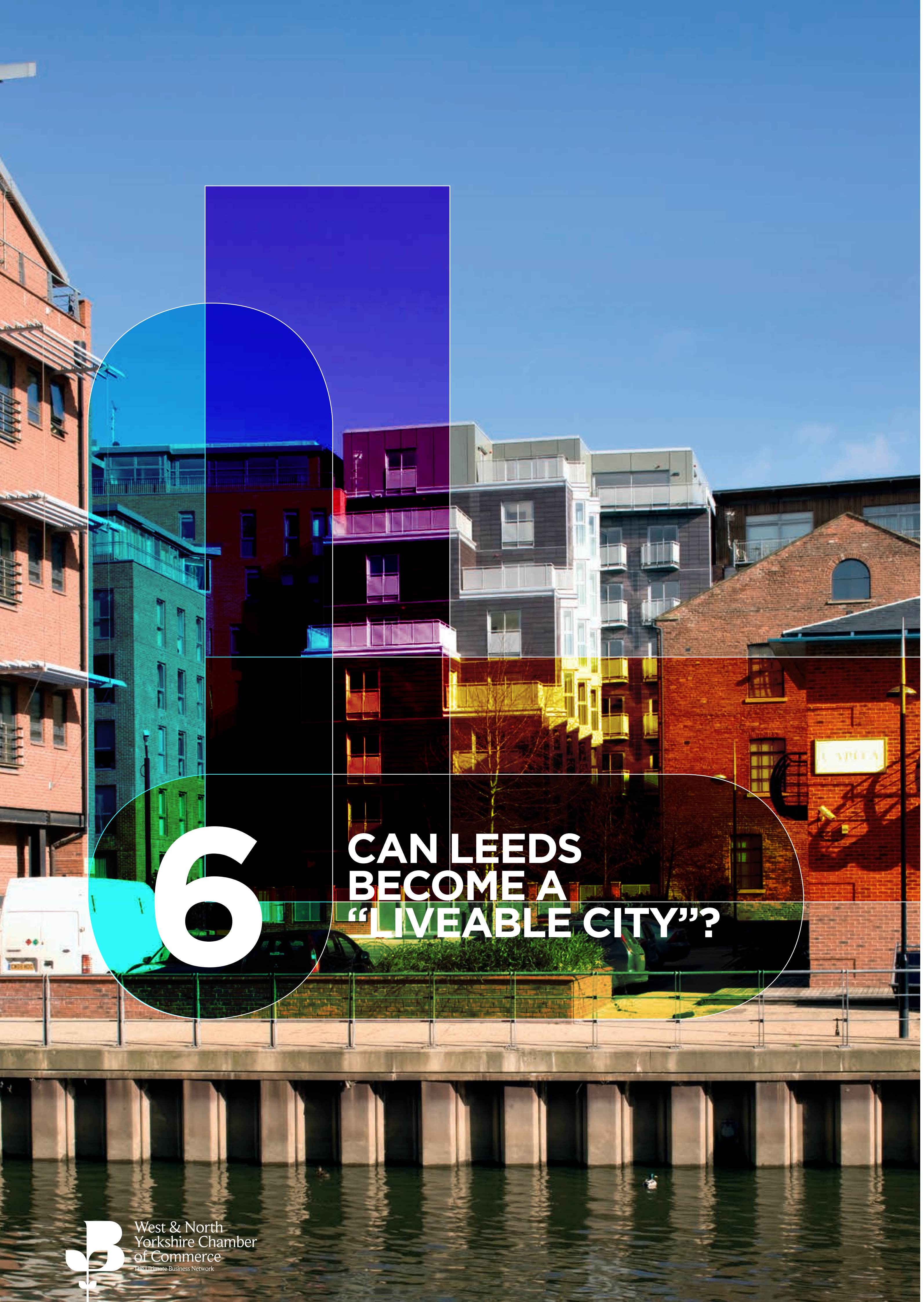
Case study: Chapeltown Cohousing (Chaco)

With some support from LCH, Chaco is creating sustainable and affordable homes for up to 33 households. Transforming derelict land into a vibrant neighbourhood with low-energy homes, shared facilities and gardens, recreational space, opportunities for inter-generational connections and a diverse intentional community grown from the local area.

In 2010, the members of a small housing co-op on Spencer Place invited some friends living nearby to explore the idea of setting up a cohousing scheme in the neighbourhood. They were inspired by the example of multiple award winning Lilac, who were about to start construction of their own scheme. Chaco have raised over £600,000 in loan stock and levered in other significant funding, including from government. They have the support of LCC and are working in partnership with Unity Housing Association on the site. There will also be self-build plots available.

Opportunity in Leeds

Leeds Community Homes has ambitions to build, refurbish and enable 1000 homes over 10 years. With funding from Power to Change, a new government fund of £60m a year, and interest from many groups in Leeds and beyond, LCH is keen to work with private sector partners to build more homes that involve local communities, create social value like training and jobs, and produce benefits for all stakeholders.



6 CAN LEEDS BECOME A “LIVEABLE CITY”?

Leeds has all the attributes to become a “liveable city”. This paper is a “**call to action**” to all parties involved in delivering housing to help to achieve it.

As a “liveable city”, Leeds would meet its stated ambition of becoming “the best city in the UK”. It would have “great streets and complete neighbourhoods, where walking, bicycling, and transit are the best choices for most trips, where public spaces are beautiful, well-designed, and well-maintained, and where housing is more plentiful and more affordable”. It would have at its heart, values of “sustainability and resiliency”, “health and happiness”, “equity” and “democracy and community”. It would be a place where people aspire to live.

What is required?

The city council are committed to housing delivery as part of the overall approach to being the best city in the UK. This needs to be maintained. To become a “liveable city” we would encourage the Council to:-

- Be **ambitious** in setting the amount of new housing required;
- Fully **align housing to the economic strategy** for Leeds so that housing does not become a fetter to growth for business, workers and graduates;
- Continue to use **housing delivery as a catalyst for regeneration** and change within Inner Areas;
- Continue to focus upon **city centre housing delivery** and embrace new housing approaches such as Build to Rent;
- BUT balance the desire to focus new housing into the city centre, brownfield sites and regeneration areas with **increasing the number of housing outlets in suburban and outlying settlements** to meet all facets of housing need and demand;
- **Review the approach to the emerging Core Strategy and Site Allocations Plans** to ensure that they fully align with economic ambition; give the diversity of site and location needed to meet the full range of housing requirements; and that other policy requirements do not threaten the viability of housing site delivery;
- **Improve planning application processes** to give increased certainty and confidence;
- **Engage with the housing developers** to better understand their requirements and work with them in a positive and transparent way;
- Support **capacity building within communities** to **increase their understanding of the benefits of housing delivery**;
- Target the **delivery of affordable housing** where it can make the most positive impact to communities;
- Continue to **make the case for Government infrastructure funding**, aligned with the Private Sector;
- Take a **lead on the alignment of infrastructure delivery** with housing delivery;
- Be transparent with Communities on the Developer Contributions paid towards social and physical infrastructure delivery and **prioritise delivery** of such funding to the communities affected.
- Consider the opportunities for **direct council house building and for joint venture partnership.**

Housing developers need to continue to be the agents for housing delivery and to increase delivery, but for Leeds to become a "liveable city" the housing developers need to:-

- Communicate the benefits of housing to all stakeholders;
- Communicate better and engage with communities;
- Work in partnership with the public sector and communities;
- Embrace competition in the market for land to support the new entrants into the market;
- Deliver housing choice and mix in the right locations and through a variety of site sizes;
- Work collaboratively with the Council to bring forward "stuck" sites through pro-activity and flexibility in their approach to delivery;
- Support the delivery of affordable housing where it is viable to do so;
- Accelerate housing delivery through use of innovation such as modern methods of construction;
- Enhance the quality of place-making and design;
- Support local employment initiatives and apprenticeships; and
- Deliver places that everyone is proud of.

Local communities are key to increasing housing delivery and how they embrace enhanced housing delivery will be key in Leeds becoming a "liveable city". Local communities could:-

- Recognise the benefits of housing and be vocal to support appropriate new housing schemes;
- Be open to a dialogue with housing developers;
- Be clear on community priorities; and
- Hold Politicians and Developers to account on what they commit to do.

Government in all its guises must:-

- Prioritise funding for key infrastructure priorities such as a mass rapid transport system for Leeds;
- Devolve decision making powers into the local areas who can best prioritise schemes and initiatives;
- Provide additional funding into local authorities to increase capacity; and
- Share good practice nationally on accelerated housing delivery.

Infrastructure Providers should

- Engage early on at the Development Plan stage;
- Prioritise delivery to align with housing delivery; and
- Improve communication and reduce bureaucracy.

Together we can make Leeds a "liveable city" and we can ensure that the housing growth agenda is reconnected with the economic growth agenda.

CHAMBER HOUSING GROUP

Arup
Barratts
Caddick
Carillion
Carter Jonas
Cartwright Pickard
Ch-Y
Ch-Y
CITU
Commercial Estates Group
CTP
Cushman & Wakefield
Duchy Homes
HBF
HBF (Planning Manager)
HCA
JLL
Keyland
Kier Living
Linden
McCarthy & Stone
Mears
Millers (Planning Chair)
Morgans City Living
Persimmon
PPS
Rushbond
Shulmans
Spawforths
St Modwen
Stonebridge Homes
Strata
Taylor Wimpey
Verdi
Westleigh
Yorkshire Housing

SUPPORTERS

HBF HOME BUILDERS FEDERATION
BARRATT HOMES
JLL
spawforths
CUSHMAN & WAKEFIELD
DAVID WILSON HOMES WHERE QUALITY LIVES
NEWGATE COMMUNICATIONS

SUPPORTERS

HBF HOME BUILDERS FEDERATION

BARRATT HOMES

JLL

spawforths

CUSHMAN & WAKEFIELD

DAVID WILSON HOMES
WHERE QUALITY LIVES

NEWGATE
COMMUNICATIONS

West & North Yorkshire Chamber of Commerce
The Ultimate Business Network