

CREATING SPACE FOR FUTURE SUCCESS

Ensuring growth happens in Bradford



Bradford
Chamber of
Commerce

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ACKNOWLEDGEMENTS

This report has been written and produced by West & North Yorkshire Chamber of Commerce, with the help of its member businesses and in particular Bradford Property Forum (BPF).

In particular, contributions have come from:

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Several companies are included as case studies, so thanks to them too.

Thanks to these and others for helping to produce the report.

Mike Cartwright, West & North Yorkshire Chamber of Commerce

April 2018

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SECTION

INTRODUCTION

Why this report?

Bradford's economic growth strategy (published in March 2018) makes reference to the bringing forward of employment land and office accommodation to support new and existing business growth. The strategy's targets include raising GVA by £4bn, getting 20,000 more people into work and raising the skills level of 48,000 to NVQ3 - all by 2030.

The strategy states that three sites within the District will be used to create 'enterprise zones' (areas with fiscal incentives to encourage businesses to relocate), and therefore support growth. It is an acknowledgement of the increasing 'noise' being made on this topic by businesses from various sectors, of diverse sizes but, unfortunately, it will probably not be enough to placate those businesses, now or in the future. In short, there is a growing gap between supply and demand, due to fewer sites coming forward to replace the ones taken up.

What are the issues?

A growing number of businesses or their representatives, such as property agents, are saying that there is a shortage of suitable employment land being made available in the Bradford District. While this issue, due in part to the topography of Bradford, may have been around for quite some time, the consequences for future economic growth in the District could be quite significant.

While this is not simply a local issue - as demonstrated in a British Chambers of Commerce report ('Planning for Business') in late 2017- it is necessary at this time to bring it to the fore, in order to get something done.

Working together

This report is aimed at highlighting the issue, as told to us by businesses, providing case studies, and related issues of concern, and to make suggestions for consideration by policy-makers to help improve matters in the future.

As well as highlighting the issues, it is an offer from the Chamber and the business community to work with others to improve the situation, to support future economic growth. The Chamber's Property Forums work closely with all our local authorities on land and planning matters, discussing relevant issues on a regular basis.

Finding a solution

To evidence the challenge, this report will feature examples of companies that have (or have had) difficulties finding new premises more suitable for their future needs within the existing local authority area. It will also make reference to other Yorkshire towns and cities on what land has recently been available for possible development there.

We will then assess some of the other reports and documents used to help determine how much land is going to be needed for future development in the Bradford District. These include papers written as part of the Core Strategy examination.

The information and evidence included in this report will demonstrate the challenges and opportunities of economic growth. It demonstrates that more large and super-large sites need to be brought forward for employment use in order to boost future growth and economic success in Bradford and the wider District.



SECTION

ANALYSING THE SITUATION

From the Chamber's own conversations with companies, we know that decisions around location are made based on some or all of the following criteria:

1. Suitability of location for business operations
2. Availability of appropriately skilled employees
3. Ability of existing and future workforce to get to work conveniently
4. Access to road and rail network (especially motorways)
5. Access to broadband and mobile communications infrastructure
6. Proximity to supply chains and customers
7. Quality of environment, proximity to supporting services e.g. retail, hospitality
8. Capacity and space to grow
9. Land value, rental levels, business rate relief and other incentives

Meeting business expectations

Bradford Council and the business community have big aspirations for the city.

As it has one of the fastest growing populations, it needs to ensure that it can create the job opportunities for its citizens now and in the future. The city's economy is worth circa £9.5bn, and has the potential to be greater still. There are 17,600 businesses employing 198,600 people in Bradford District. Bradford accounts for 15% of the total employment in the Leeds City Region. The number of businesses has increased significantly in the last three years, rising from 15,145 in 2013 to 17,620 in 2016. This was an increase of 16% that was higher than Leeds City Region and UK.

image courtesy of Keyland Developments





Enterprise and opportunity

In addition, as the city with the fourth highest number of manufacturing jobs in the UK, and a thriving digital sector, it is important to ensure that these jobs are retained in the city, capitalising on its 'Producer City' ambition.

It is also accepted that the District has a strong culture of entrepreneurship, with over 33,400 self-employed people, an increase of 23% since 2010. With the right opportunities, and available support, these entrepreneurs have the potential to develop into the next major employer.

Against this backdrop, there continues to be increased competition from overseas, and further uncertainty surrounding Brexit. This, coupled with changing operating practices, means that land and buildings must reflect the changing business requirements.

Legacy and Evolution

Bradford's industrial legacy has created a unique environment, which needs to evolve to support existing and future businesses. Much of the existing industrial land is not of an appropriate standard, and has poor connectivity to the main highway network, such as Thornton Road.

The Development Plan for the District should allocate new employment land, but has relied on the same long-standing sites for a number of years, with only Baildon's Buck Lane Technology Park being a significant new location coming to market in recent times. There has been very limited new, particularly, large-scale, employment sites come forward in Bradford. There is also increasing competition from neighbouring authorities, who have continued to identify and allocate new employment sites catering for current and future business needs.

The city is close to Leeds, Kirklees and Wakefield, as well as Harrogate and Skipton to the north; and so faces competition on many fronts; and yet it manages to nurture many national and international companies based in the Bradford District. However, as we look to the future, we find ourselves asking "Is there the land available in the city, in the right locations and in the right condition, that will support its growth?"

Supply and Demand

Experiences by some local businesses (included elsewhere in this report) indicate that they are struggling to find suitable alternative premises, but want to remain in the city close to their skilled workforce. Simply, we need to ensure that there is a supply of good quality, well-located sites capable of meeting the needs of the manufacturing and logistics sectors. This is not to say we should ignore the potential requirement for new city centre office space as this is vital to ensuring the viability of the city centre.

It is also noted that there is increased competition from the house-building sector for sites. Releasing greenfield sites remains sensitive, thus placing more pressure on brownfield and reducing the potential sites available for employment uses, as landowners seek the highest land value.

Growing up, but not growing old

Importantly, Bradford has one of the fastest-growing and youngest populations in the country. Therefore, the need to ensure that there are employment opportunities will continue to grow. The city is the location for a number of key headquarters in sectors including financial services, manufacturing and retail. They will continue to need a highly skilled workforce, as well as accommodation to match their business requirements.

It is well-known that companies locate close to similar ones, creating a positive synergy, and this has a productive impact on supply and support chains. This needs to be explored further and built upon, that is, there needs to be more local opportunities for relocation.

The Chamber of Commerce has supported the Council in promoting improvements to transport links to the city, such as Northern Powerhouse Rail. This new rail connection will bring opportunities to the District and West Yorkshire generally (see separate piece elsewhere on NPR).

CASE STUDY 1

SEARCHING FOR SPACE

A long-standing family-owned business based on the east of the city centre, this case study finds a firm in very unsuitable premises.

The current 20,000 sq ft is based over four floors, is on a main road, and has some on-site parking. While some of the current space is admittedly poorly-utilised, the building is unfit-for-purpose. More space is needed for the operations/warehousing/distribution part of the business, which is, as you would expect, on the ground floor.

All about location

The owner needs to find a suitable site of around 30,000 sq ft, including office space, that is modern, of reasonable proximity to the motorway and ideally in the same part of the city. The business is successful and continuing to grow (the most recent percentage rate growth was in double figures – three to four times the typical rate).

While previous adaptations and amendments have been made to the building to help facilitate change and growth, all options were exhausted in late 2013, and the business owner began looking for alternative premises. The search is yet to bring up an alternative suitable location.

Making space for growth

The owner says: “There are too few sites available, whether new or recycled. Of those that do exist, they are either in the wrong place, are too big, or sometimes are withdrawn from sale. It gets to be very frustrating. There are certainly not enough new premises available, and so I hope that will be addressed within the allocations process of the Local Plan.”

To add further to the frustration, the business leader spent several months during 2016-17 liaising with the owner of premises close to the city centre, only to be told that the site was no longer for sale!

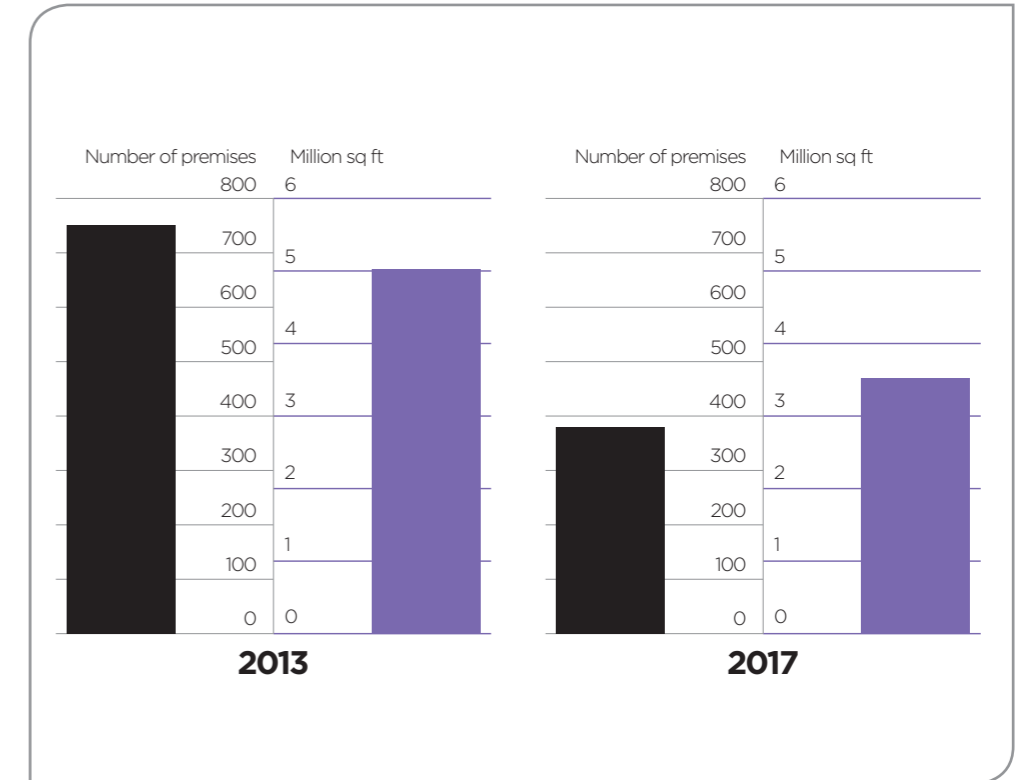
Working capital

Baldon Park is on the wrong side of town; Parry Lane’s development and availability will be too long coming for this business; and contemplating a site larger than 30,000 sq ft would side-track the owner from core business activity – “I’m not a developer”, he says. He added that early on in the process a site on Euroway was available, but he wanted the working capital created by selling the existing building first; in hindsight a more proactive view would have helped.

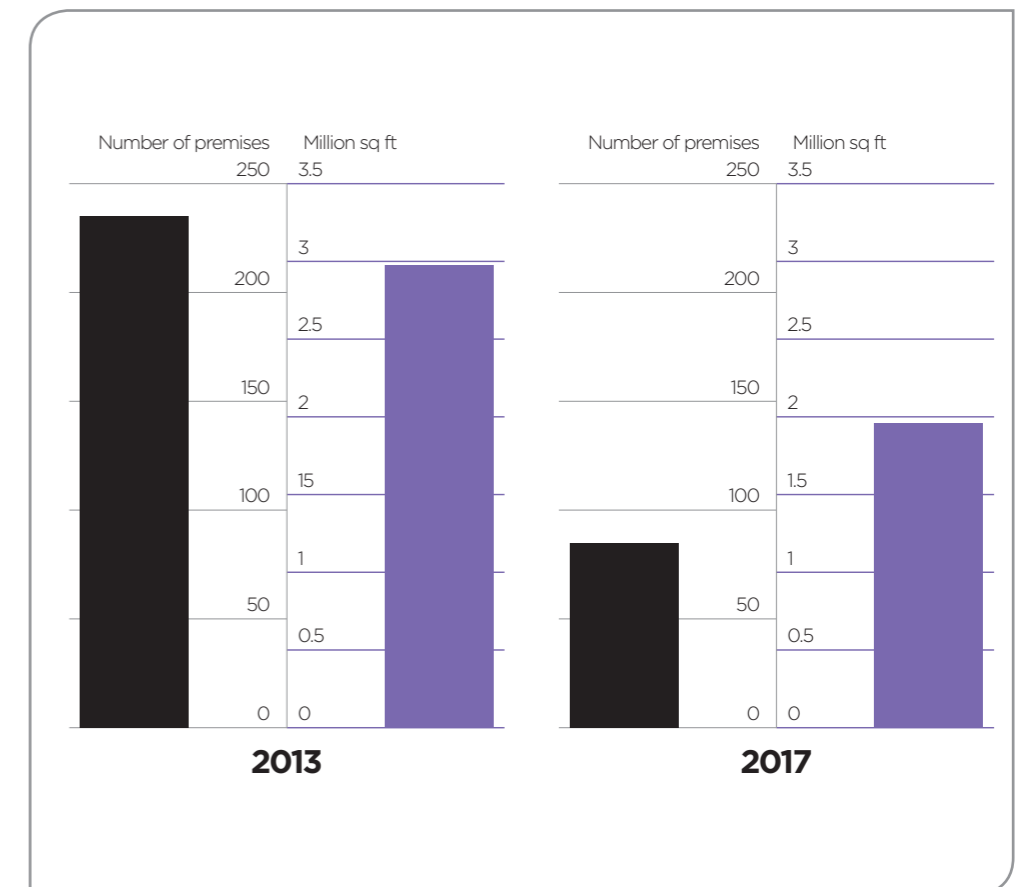
The restrictions caused by not being able to find more modern and suitable premises are damaging the firm’s future development and growth; who knows what the owner’s future thinking may include?

In 2017, there were 49% fewer commercial premises available (33% less floor space) than in 2013. For industrial space those figures equate to 65% and 33%.

COMMERCIAL SPACE



INDUSTRIAL SPACE





3 SECTION

CURRENT MARKET CONDITIONS

Pent-up demand

Geography and topography have always played a major part in the limitations on development in Bradford. Some land-owners and regional developers have undertaken a small number of employment schemes on isolated sites, but there remains significant pent-up demand for substantial premises.

Various successful local businesses should be applauded and encouraged in their efforts to expand but are stifled and suppressed by the lack of suitable premises often meaning that expansion does not occur at the rate which may be possible. Many of these businesses wish to remain in the Bradford district having a loyal and productive workforce and a general desire to remain in the city where often their business was founded and has prospered. This can mean difficult decisions regarding how the business will grow in the future.

National interest

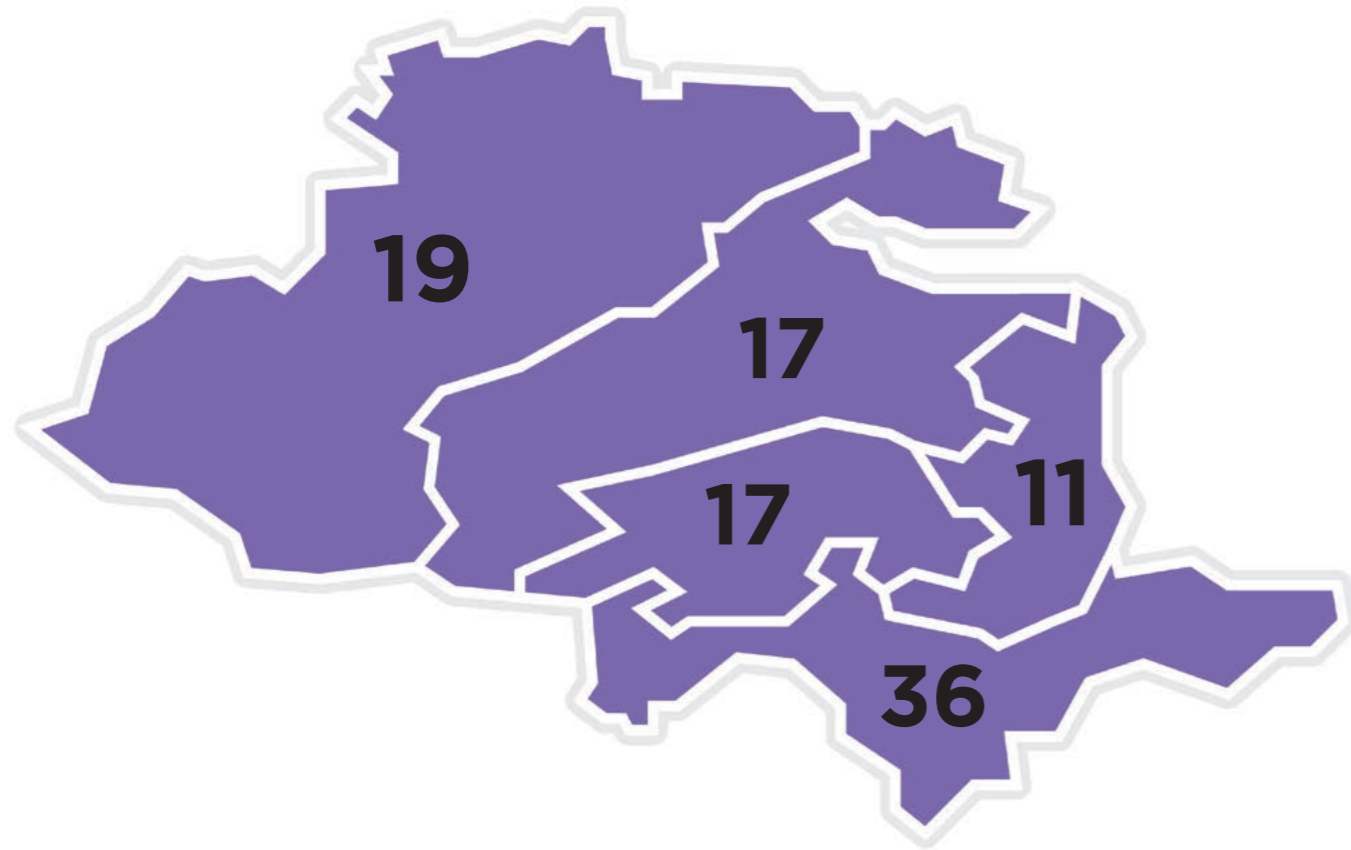
There is significant rental growth in the industrial sectors in recent years, making new-build schemes in the right location much more viable and profitable for developers. There is also significant interest, locally, regionally and nationally, in developing sites in Bradford.

Land allocations are, therefore, extremely important in enabling development. There is sometimes a tendency from owners of land more suitable for employment use to hold out in the hope of attaining residential consent (no surprise, given the higher land values). However, if these sites were allocated for commercial/industrial, the owners may accept the inevitability of employment use and develop accordingly.

Working together

The recently-created enterprise zones need to be progressed and developed in a timely fashion to maintain the impetus on progress and satisfy some of that pent-up demand. Liaison and communication between public and private sectors can be improved so that co-operation between local authority, developers, agents and others involved can find innovative solutions to help meet the growing demand.

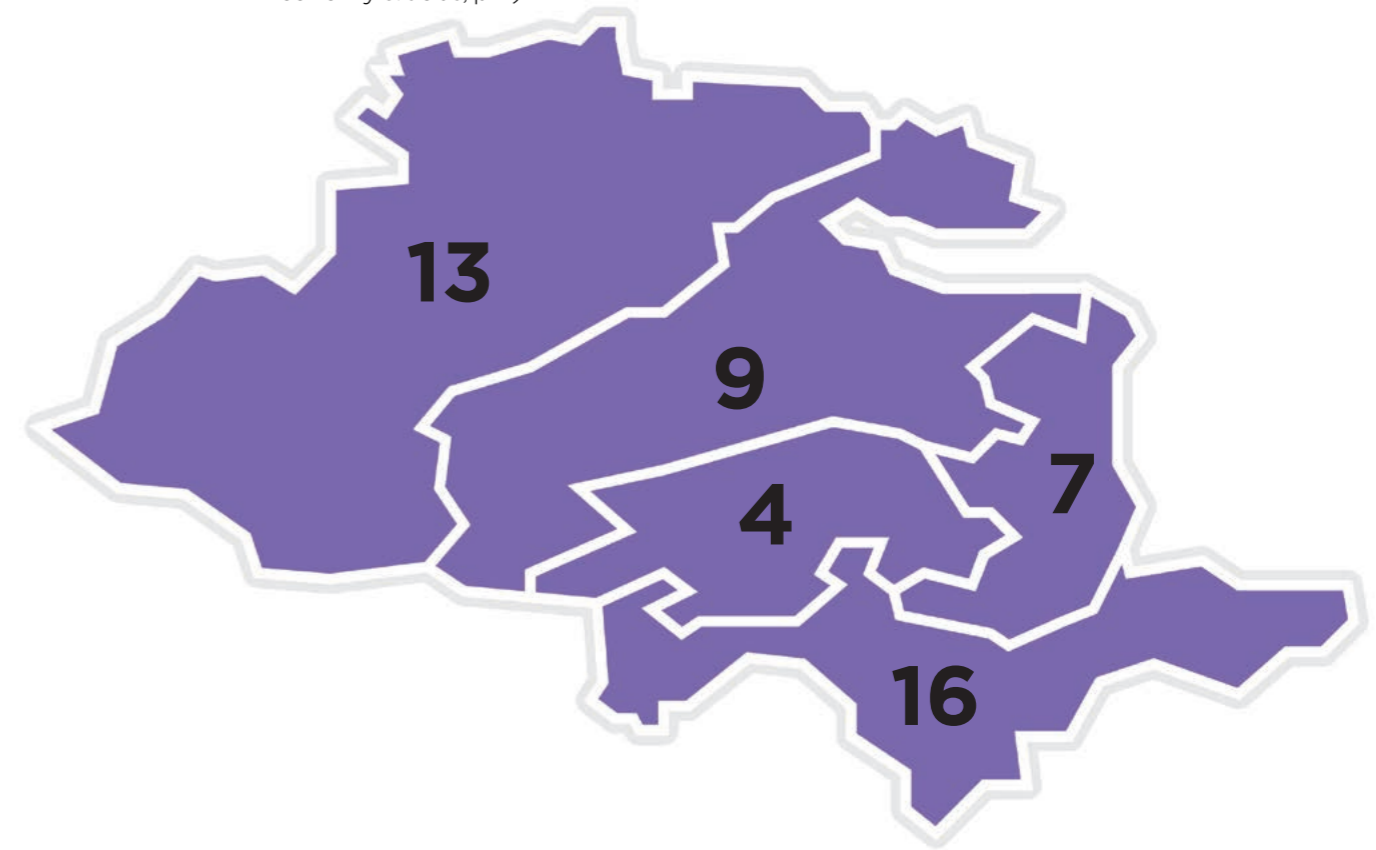
Land allocation by constituency (%)



Available land in District		114.76ha
Allocated land in District		107.68ha
Unallocated land in District		7.08ha
Total land available in:		
Bradford East	11 sites	19.24ha
Bradford South	18 sites	40.74ha
Bradford West	6 sites	12.40ha
Keighley	13 sites	21.98ha
Shipley	9 sites	20.40ha
Total	57 sites	114.76ha
Total allocated land in:		
Bradford East	7 sites	15.78ha
Bradford South	16 sites	40.74ha
Bradford West	4 sites	12.40ha
Keighley	13 sites	21.98ha
Shipley	9 sites	20.40ha
Total	49 sites	107.68ha

Number of Sites

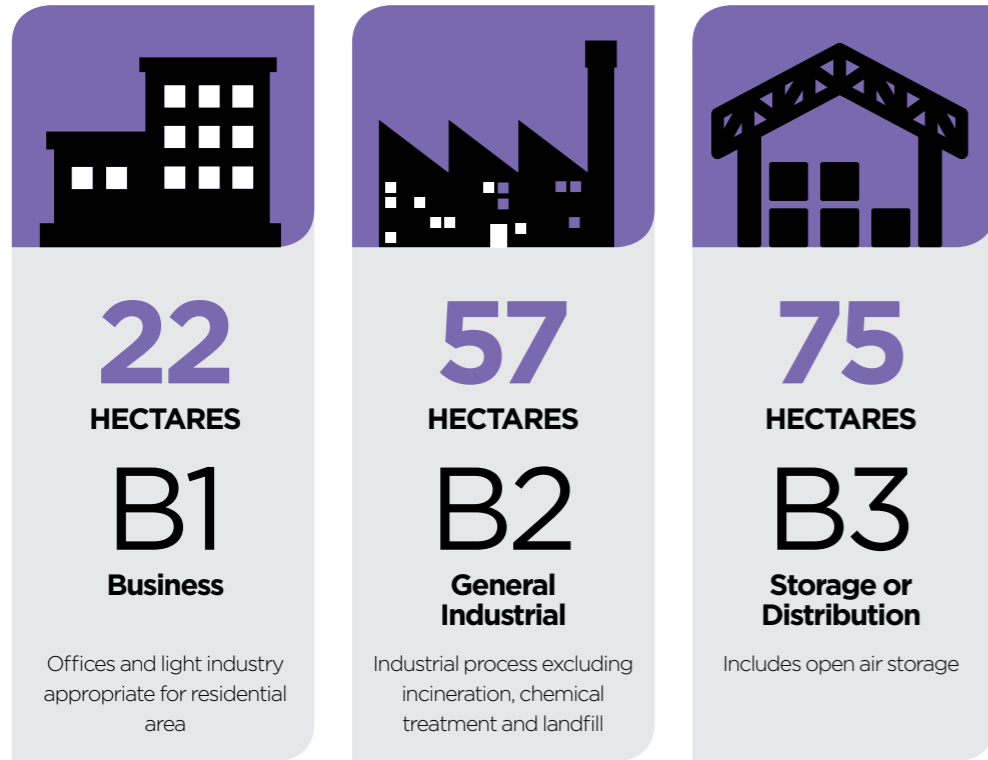
Employment Land Supply 2013 (Reference: Core Strategy Background Paper: Economy & Jobs, p21)



Allocated Land	Total Area	Number of Sites	Sites < 1ha	Sites > 1ha	Sites > 5ha
Bradford East	15.78	7	4	2	1
Bradford South	39.01	16	8	6	2
Bradford West	10.51	4	1	2	1
Keighley	21.98	13	7	5	1
Shipley	20.4	9	5	3	1
Total	107.68	49	25	18	6

Projected land requirements in the 'B' Use Class

(Figures taken from Feb 2014 Core Strategy background paper: economy and jobs, p21)



CASE STUDY 2

ENGINEERING SUCCESS

Established 30 years ago, case study 2 involves premises previously owned by the business but sold several years ago and moved to a lease-hold unit in south Bradford. The site is 25,000 sq ft. The business is growing; they wanted to buy but were unable to identify anywhere suitable that allowed for future expansion.

The business is a manufacturer of specialist engineering systems working across the world for a variety of high profile clients. In recent years it continued to grow and, in 2014, began searching for new premises needing around 50,000 sq ft of space.

To date, nothing suitable within the Bradford District has been identified and the business has struggled to manage growth and workloads. When larger scale orders are being constructed the entire building and car park grinds to a halt to allow for craned access and large vehicle collections to be undertaken.

In 2016, out of desperation the business considered a move to North West Leeds, where substantial space was being built/made available. Management undertook serious due diligence on a new-build scheme in the area. On consulting staff, they found the move to be unpopular, and would likely lead to a significant loss of staff. The business relies on skilled labour and so management accepted that they must stay in the District to retain this valuable asset.

They feel they are stuck in a low gear, being unable to find suitable premises in which to grow the business, but likely to lose key workers if they were to move out of the area.

The business continues to strive to find new premises in the District, but the lack of options available is frustrating and stifling the company's abilities to grow.

CASE STUDY 3

INVESTMENT NEEDS

A long-established, internationally owned, timber product company had outgrown its existing premises and was looking at its options.

The business was in an adjoining local authority but close to Bradford's boundary. Local agents were engaged to seek larger premises of 150,000-200,000 sq ft for the relocation. The client had flexibility in terms of size, layout and specification of the space. The business was looking at the whole of West Yorkshire but had a preference for Bradford or Kirklees local authority area, to assist with staff retention.

Results of the agent's search highlighted 19 options around West Yorkshire, with approximately half being existing buildings and the other half potential new-build schemes. Many were in Leeds with a number of others being in Kirklees, Wakefield and Calderdale. One existing building was identified in Bradford, but quickly dismissed due to it being poor loading access and in need of substantial capital investment.

Despite the potential for a company of substantial size coming into the District, bringing high numbers of jobs and significant income via business rates payments, Bradford had to be dismissed as an option due to the lack of any viable options. The company eventually relocated to a site in Kirklees.



WHAT'S HAPPENING ELSEWHERE?

Compare and contrast

The stated Employment Land Requirement for Bradford is 135 hectares, which it must find to satisfy local demand. Competition will inevitably come from other local authorities, who are all at different stages of formulating their own Development Plans.

Leeds has an overall requirement of 493 hectares of industrial and warehousing land. It benefits from good transport links, easy access to the rail network, plus the M1, M62, M621 and A1(M). Leeds has identified more than 300 suitable sites, the majority of which are brownfield. Areas such as the Aire Valley Enterprise Zone allows for added incentives for businesses to locate there.

Calderdale has an employment land requirement of 60 hectares. The majority of this land has been identified close to the M62. A 25 hectare site has been put forward at Clifton, near Brighouse, with proposals to form an Enterprise Zone. Calderdale has also put forward ambitious plans for a large employment allocation in the Bradley Bar area, proposing a new 24a motorway junction directly onto the M62.

Kirklees identified in 2015 an overall requirement of 220 hectares of land for business and industry, of which 90 hectares should be new. This new allocation has been targeted in four main areas, all with good access to the motorway network: Chidswell, close to the M1 and M62; North East Bierley M62; Clayton West M1; and Cooper Bridge M62.

Wakefield's most recent Local Development Framework identified a requirement of 350 hectares by 2021. 225 hectares of this was already available and it's been confirmed that an additional 95 hectares of new land should be identified for use class B8 (general industrial). Wakefield benefits from easy access to the rail network and the M1, M62 and A1.



PROVIDING DEVELOPER CONFIDENCE

Bradford Council first carried out an Employment Land Review (ELR) Study as part of the preparation of the evidence base for the new development plan at the end of 2007, updating it in October 2011. Arup produced a parallel report for the Council in 2010. The October 2011 report reviews the historical take-up rates of employment land between 2006/7 and 2011.

Quality and quantity

As stated, take-up rates of employment land are influenced by several factors, including local economic strength; sites on offer; and the skill-base of the workforce. During the above period, take-up occurred largely in Bradford South, mainly around the M606 corridor at Staygate, West Bowling Golf Club and Euroway Industrial Estate.

The 22 hectare (ha) development of the West Bowling site by ProLogis was the largest development (now largely occupied by the Marks & Spencer distribution depot). This boosted the average District-wide take-up over the period. Some 8.7 ha were developed in Airedale during the 2006/7-2011 period, comprising mainly of a 5.5 ha development at Hainsworth Road, Silsden.

Checking the rear-view mirror

The average annual take-up rate, based on 71ha of development activity during this recessionary period, was 14ha. The 2010 and 2011 review documents are important as they illustrate some of the site identification and delivery issues facing the Bradford economy up to 2030, as covered by the July 2017 Core Strategy.

The 2011 report acknowledges a shortage of good quality sites, resulting in a relatively low take-up (paragraph 5.5.1). It adds that “ongoing work is needed to ensure well-located serviced sites are coming to the market on a regular basis.” The report identifies that ProLogis Park and the south and east of the District have the necessary quality motorway access to provide such premium sites. Looking further back, average annual take-up for 1993-2010 (incorporating earlier periods of stronger economic conditions) was 14.85 ha.

The 2011 ELR concluded that the remaining supply of employment land (107 ha) “was not entirely suitable for modern economic development requirements - as many sites are too small, have difficult physical constraints or are located in those parts of the District where there is little demand for new employment uses.” The report envisaged that future economic development would focus in the main urban area of Bradford, especially the south, in Airedale and close to Keighley and Ilkley.

Staying up-to-date

The 2011 ELR has not yet been updated, but government advice states that any evidence-based document over three years old cannot be considered a reliable source for future development planning, or for the provision and allocation of sites for housing, employment and support infrastructure.

The latest Annual Monitoring Report for development plan preparation (July 2017) covers the year 2014/15. This report states that 96.9 ha of employment land was available, but this supply is made up of many small, constrained and poorly located sites. There is no up-to-date qualitative analysis of this land supply. It is noteworthy that during 2014/15 some 6.25 ha (673,000 sq ft) of employment land was re-allocated to residential development.

The 'Acid Test'

Via the National Planning Policy Framework (NPPF), the Government is encouraging recycling of redundant employment allocations and permissions for much needed housing development. Paragraph 22 states that:

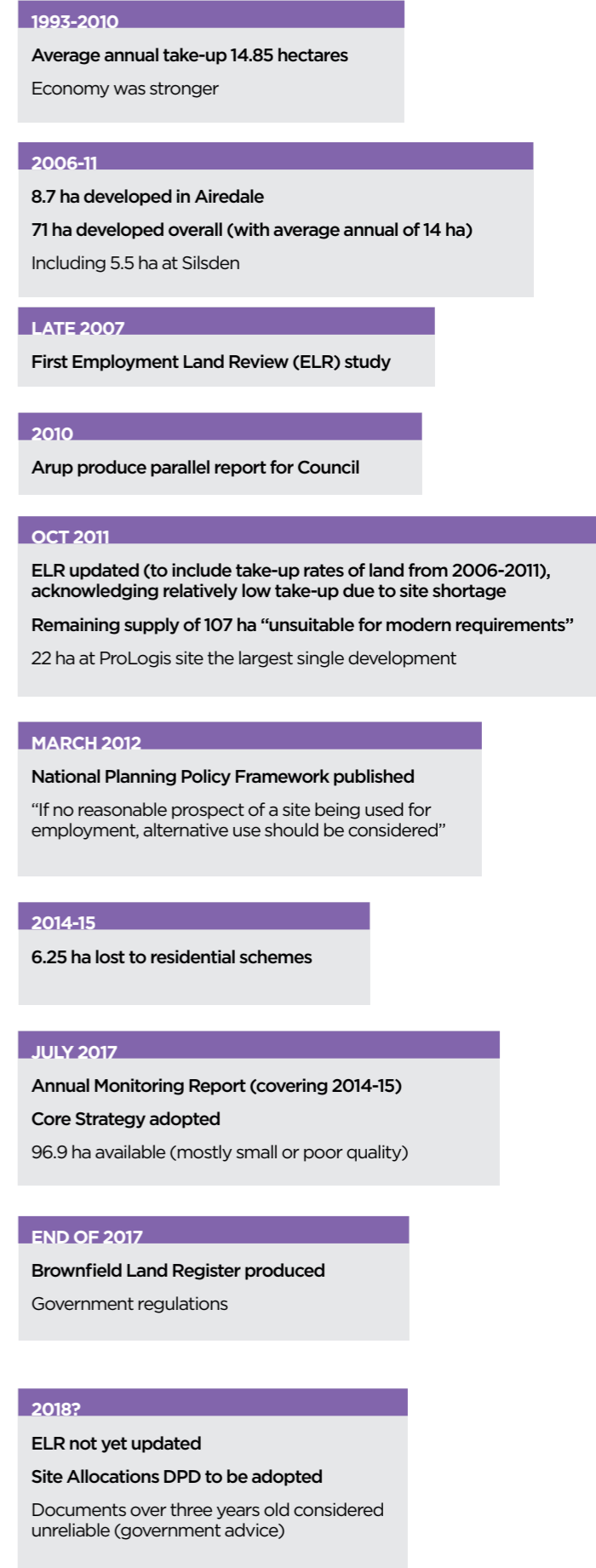
“Planning policies should avoid the long-term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.”

(NPPF, March 2012; p7, clause 1.22: Building a Strong, Competitive Economy)

This key piece of national planning policy presents an 'acid test' which has not yet been adequately applied to the historic employment land supply in Bradford. An early and radical review of all sites in the quoted supply is essential as the adopted Core Strategy policies on employment land supply are based on an out-of-date and inadequate supply. This will form a key basis for testing how much new land with the necessary qualities is actually required.



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TRANSPORT & HIGHWAYS

The importance of transport and travel should not be ignored in relation to the allocation of employment land. Many companies, when looking for premises and site suitability, often look at transport and connectivity as part of their considerations. Whether this is utilising a ring road/orbital route, links to the airport/motorways, or proximity of public transport hubs, all are relevant issues to consider for staff.

Despite advancements in technology and other IT developments in recent years that bring businesses and their clients closer together, transport and congestion is still raised as a concern by an overwhelming number, on a frequent basis.

One example of the potential repercussions in relation to transport can be found in south Bradford. The Highways England plan to reconfigure Chain Bar M62/606 (junction 26) has held up property developments in that area for more than two years. So, while an application to develop on the former North Bierley waste water treatment works (Oakenshaw) was recently approved, a site on the opposite side of the M606 is (at the time of writing) still under review by the local planning inspector.

Northern Powerhouse Rail

Research findings by economic analysts Genecon show that redeveloping Bradford Interchange into a multi-modal transport hub on the NPR network would provide a step-change in the city's connectivity. With it would come increased land values. NPR in central Bradford could help deliver:

- 17,000 construction-related and operational jobs within 1km of the station site by 2060 - over 15,000 of which
- around £15.5bn in additional GVA towards the economy by 2060
- one hour connectivity to Bradford city centre for 7.5 million working age people across the Northern Powerhouse geographical area
- the additional £4bn to Bradford's economic output as set out in the growth strategy.

Two computer-generated images of how a future city rail station could look. Images courtesy of Bradford Council





7 SECTION

CONCLUSION

In March 2018, a new economic strategy was launched for the District. It states: "Globally connected and at the heart of Northern England, Bradford District has an economy worth in excess of £9.5 billion, with 17,000+ businesses and is forecast to grow by more than 25% over the next ten years."

Allocating land for commercial and industrial use will play a key part in helping to deliver that economic success. Updating the 2011 Employment Land Review is now a key task to help support the ambitions of the economic strategy, which is strongly supported by Bradford Chamber of Commerce and its Property Forum.

At a time when there is a greater call to support manufacturing, that land allocation process is crucial. The purpose of this report has been to identify and highlight some of the employment land issues and to help facilitate change in generating property developments.

The Core Strategy has identified the need for an additional 135 hectares of employment land. At the time of writing, the Local Authority is currently going through the process of land allocation. It is vital that more and appropriate land is allocated to employment use – in some cases, there is likely to be no alternative to some of this being green field development.

We acknowledge that land for housing is also required, and that it generally commands higher values, but this must not be prioritised to the detriment of employment land identification. Other potential solutions could include land swaps whereby publicly-owned sites are 'traded' with privately-owned ones to help facilitate, for example, regeneration, or reduce market blockages. This might be an appropriate solution when considering existing employment land allocations which are considered unsuitable due to topographic or infrastructure related issues.

These sites may be more appropriate for housing and might be 'swapped' with sites which are more appropriate for industry, for example sites which are currently on flood plains or close to major transport corridors. Access to publicly underwritten bridging finance (often short-term or 'stop gap' funding measures used to smooth property transactions) might be helpful and allow companies to move and expand without too much short term cash flow implications.

Without doubt there is an urgent need for an update to the Employment Land Review which was last updated in 2011. The Chamber stands ready to support the Council in developing an employment land policy which will facilitate economic growth and deliver greater prosperity and job opportunities for the citizens of the Bradford District.

ABOUT THE CHAMBER

West & North Yorkshire Chamber of Commerce represents businesses that collectively employ a quarter of the working population of the Leeds City Region. Membership of the Chamber is diverse and reflects all sizes and sectors of organisation across services and manufacturing.

The membership includes a large number of exporting businesses who collectively contribute over £22bn to this country's balance of payments.

The Chamber's members employ people with a very wide range of skills and expertise, including a large number of apprentices and graduates.

The Chamber exists to serve its members as they look to grow and expand their business. It provides services, advice and finance and represents members' interests with policy-makers at a local, regional and national level.

WITH THANKS TO OUR SPONSORS



Turley



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The provision of sufficient employment land of the right format in the right location is both the foundation to economic growth and a facilitator of regeneration. Bradford has the strategic locations, demographic factors and infrastructure to make this happen.

Hamish Robertshaw, Director, Johnson Mowat Planning and Development Consultants

We have seen significant rental growth in the industrial sectors in the past few years making new-build schemes in the right location much more viable and profitable for developers and indeed we have significant interest from parties both locally, regionally and nationally in developing sites within the Bradford region.

Jonathan O'Connor, Director, Walker Singleton

Bradford's industrial legacy has created a unique environment, which needs to evolve to support existing and future businesses. Much of the existing industrial land is not of an appropriate standard, and has poor connectivity to the main highway network

Marianne McCallum, Associate Director, Turley

The Chamber stands ready to support the Council in developing an employment land policy which will facilitate economic growth and deliver greater prosperity and job opportunities for the citizens of the Bradford District

Allan Booth, Partner, Rance, Booth, Smith Architects

We hope that this report will make an important contribution to the land supply debate in Bradford. We are committed to building more affordable homes for local people, and so the allocation of sites in the right place is important to us. The possibility of site exchanges to suit both house-builders and commercial developers, as referenced in the report's conclusion, should not be ruled out.

Rupert Pometsey, Director, Incommunities

CHAMBER PROPERTY FORUMS

Property Forums are run in all three of the geographical areas of West & North Yorkshire Chamber of Commerce (Bradford, Leeds and York).

They exist as sector-specific networking groups, that also inform and influence policy-making within the Chamber group. This report is one example of the Forums being used to help influence opinion and decision-making among relevant partners and stakeholders.

Each Forum is assisted by a steering group, made up of professionals working in the property and development sector. The group helps determine forward-planning, and what issues should be raised and discussed at wider networking events. Actions and outcomes are fed into relevant Chamber Leadership Groups.

There is also cross-boundary working as required, such as the Chamber's meeting with Network Rail head, Mark Carne, in Spring 2018.

As well as Allan Booth chairing Bradford Property Forum, the respective heads of Leeds and York are Jeff Pearey (of JLL) and Eamonn Keogh (O'Neill Associates).