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Executive Summary

Monitoring Context

This is the ninth report prepared by Leeds City Council to review progress of the Local Development Framework. The past monitoring year (2012/2013) remains highly influenced by the state of the UK economy however Leeds has been in the frontline of key city region developments and infrastructure projects. Both Trinity Leeds and the First Direct Arena opened in 2013 helping to give confidence and stimulus to the District and City Region as a whole. This puts Leeds City Council and the Local Enterprise Partnership in a strong position to secure and invest in transport and regeneration activities.

Progress of plan making

The root and branch reforms to the planning system have continued and the Council has embedded the Duty to Cooperate arrangements within its City Region working arrangements following the formal revocation of the Yorkshire and Humber regional strategy. The Council has made significant headway on its Local Development Framework, with the adoption of its Natural Resources and Waste Plan and significant progress of the Core Strategy and Site Allocations Plan as well as a draft Community Infrastructure Levy charging schedule. In addition, Leeds is recognised as being at the forefront of neighbourhood planning with the advancement of four pilot areas and considerable interest elsewhere.

Housing Delivery

The Council has been at the forefront of brownfield regeneration with a Housing Investment Land Strategy, including a Council House building programme, to deliver housing in areas of greatest need. This programme operates alongside a range of initiatives to stimulate the housing market and boost supply to meet housing needs across the district. As the

housing market begins to recover over the coming years the significant stock of planning permissions in place, coupled with the certainty provided by the Core Strategy and Site Allocations Plan will support the long term regeneration and growth of Leeds.

Infrastructure to support regeneration and growth

A range of infrastructure provision is needed to support the housing growth envisaged by the Core Strategy. Whilst development rates have been low this past year there have been a range of activities around the provision of critical infrastructure including: securing funding for the Flood Alleviation Scheme in Holbeck, progression of the Next Generation Transport trolleybus scheme, feasibility work on the East Leeds Orbital Road, funding for a high quality super cycle highway and work on a southern entrance for City Station.

Key findings

General

- The recession remains the key driver of slow development growth in Leeds, with some notable exceptions as set out below
- Progress on plan-making is good with significant milestones met this past year, including around Neighbourhood Planning
- There are significant numbers of developments in the planning pipeline ready to be delivered once the national economy shows signs of continued growth

Local Development Framework

- Adoption of Natural Resources and Waste Plan (save for two policies)
- Examination of Core Strategy
- Public consultation on Site Allocations plan
- 23 Neighbourhood Areas designated for Neighbourhood Plan making
- 5 new Village Design Statements
- Public consultation on Draft Charging Schedule for Community Infrastructure Levy
- Core Strategy Duty To Cooperate legal tests satisfied

City Centre

- Only 300 sqm of new office space completed however 4,350 sqm of floorspace under construction and key proposals are in the pipeline
- Over 90,000 sqm of outstanding capacity for offices but only 28,000 sqm is Grade 'A'
- Signs of a city centre housing market recovery with 318 completions and outstanding planning permissions for 6,000 homes with 240 dwellings under construction
- Trinity Leeds and First Direct Arena opened and Victoria Gate was granted permission
- Footfall increased for the first time in five years
- Leeds came fifth nationally in City Vibrancy rankings
- Significant progress on south bank projects, including £50 million for flood defence works

Housing

- New housebuilding fell to 1,623 homes
- Signs are that completions will reach 2,500 homes in 2013/14 the highest level

since 2008/09 but still short of the Core Strategy target

- 74% of new homes were in the main urban area and 87% were on previously developed land
- There are 26,500 homes with permission or on allocated sites yet to be built
- 50% of homes were flats or maisonettes
- 360 affordable homes were built with 20% provided through Section 106
- 162 purpose built older persons units were completed
- An extension to Cottingley Springs Traveller site is pending the decision of the Secretary of State

Employment

- New employment construction has decreased by 60% because of fewer large completions
- District-wide office floorspace completions have doubled
- The majority of development is in the main urban area
- The availability of large floorspace units for manufacturing and industrial uses will be investigated this coming year

Retail and Leisure

- Generally slow growth as a result of the economy
- The Holt Park Leisure Centre, First Direct Arena and City Centre Everyman Cinema opened
- Some foodstores are under construction but the sector continues to adjust to the recession and changes in retail behaviour

Infrastructure

- High Speed Rail Phase 2 route announced with proposals for a new station on the south bank

- New Generation Transport Trolleybus scheme progresses and achieves key milestones
- 10 year £1bn West Yorkshire Transport Fund approved
- East Leeds Orbital Road and Leeds Bradford Corridor schemes are progressing
- £29million City Cycle Ambition Grant funding secured

Transport and Accessibility

- 10,000 more journeys approaching the city centre than last year
- Modal share remains the same as last year but long term trends show that cycling into the city centre has increased by 158% over the past ten years and walking has increased by 35%
- The accessibility of new housing remains good with only around 9% of new homes

not able to access services by public transport

Environment

- Absolute reductions in climate emissions for the District fell by 18% and maintained a trajectory of absolute reduction
- Trinity Leeds received a BREEAM “excellent” rating for on-site carbon saving initiatives and the First Direct Arena was BREEAM “very good”
- A range of Council run home energy efficiency campaigns were run
- Total grid connected energy reached 15MW (enough to power 22,500 homes)
- Over £1million was received from S106 contributions for greenspace; enabling among other things 8 new children’s play areas and 3 sports pitches

Leeds Authority Monitoring Report 2012/2013

Introduction

This is the ninth report prepared by Leeds City Council to review progress of the Local Development Framework. It primarily relates to the period 1st April 2012 to 31st March 2013, but where it does not this has been made clear and in some instances non-numeric information has been presented so as to be as up-to date as possible.

The Localism Act¹ sets out the requirements for an Authority Monitoring Report (AMR). The primary purpose is to share the performance and achievements of the planning service with the local community and to identify whether policies are having their intended effects and to identify interventions which may be necessary.

Monitoring Context

The past year remains highly influenced by the state of the UK economy and throughout 2012 and early 2013 the Office of Budget Responsibility was forecasting GDP growth of 0.8% and did not rule out a triple-dip recession. This helps to partly explain why performance against indicators looking at rates of development growth remain lower than target. To that end, access to finance and the state of the construction industry remain key impediments to the achievement of policy outcomes in Leeds.

Nevertheless there have continued to be significant local success stories, especially capitalising on the major investments for the City Centre which were reported in AMR 2012. The Leeds Arena and Trinity Shopping Centre both opened in 2013 and construction of the Victoria Gate mixed retail/leisure development began.

Whilst housebuilding in general remained low, the Council's steps to diversify the supply of land and progress a Brownfield Land Programme, including the construction of new Council Housing, helped stimulate the housing market.

The latest messages (December 2013) from the Office of Budget Responsibility are that the UK economy has picked up more strongly during 2013 than was expected and GDP growth as a whole for 2013 was revised from 0.6% to 1.4%. This improvement should start to be seen in monitoring outcomes over the coming years.

Changes to the planning system

The new planning system as set out in the Localism Act continued to bed down and key aspects of the National Planning Policy Framework were clarified by the publication of Draft National Planning Guidance in July 2013.

The Yorkshire and Humber Plan was formally revoked in a Ministerial Statement in February 2013, which means that the policies and targets of the regional strategy no longer form material considerations for the purposes of plan making and decision taking. Work on local targets for housing,

¹ Regulation 34 of The Town and Country Planning (Local Planning) (England) Regulations 2012

jobs and retail progressed through the Core Strategy, which was Examined by the Planning Inspectorate.

Other planning changes are also likely to have important effects. For a period of 3 years, between 30 May 2013 and 30 May 2016, a change of use of an office building to a residential use will be permitted development and not require planning permission. This is subject to a prior approval process related to transport and highways impacts and contamination and flooding risks. Prior approvals will be monitored and reported on in future AMRs.

Leeds Policy Context

Changing Nature of Local Government

The Commission on the Future of Local Government published a report in the House of Lords in 2012 which set out recommendations on the future shape and role of local government. Set up by Leeds City Council to explore how councils need to change to best position themselves to deal with current and future challenges, the report concluded that councils are doing a good job in the face of adversity, but that they need to do more.

This AMR charts progress of policy areas which directly influence the themes raised by the Commission including: the need for an agreed and well-functioning Core Strategy, creating conditions for sustained economic growth, delivering 21st century infrastructure and the provision of sufficient new homes for all local people.

Leeds City Region

The Leeds City Region (LCR) Partnership brings together the eleven local authorities of Barnsley, Bradford, Calderdale, Craven, Harrogate, Kirklees, Leeds, Selby, Wakefield and the City of York, along with North Yorkshire County Council. The LCR Partnership shares the common aim of a prosperous and sustainable city region and works together in areas such as transport, skills, housing, spatial planning and innovation. The Partnership is also dealing with the Council's Duty to Cooperate responsibilities (as detailed below).

The City Region Local Enterprise Partnerships (LEP), is a joint local authority and business body brought forward by local authorities themselves to promote local economic development. The LEP has prepared a draft Strategic Economic Plan (SEP) outlining a vision of unlocking the region's economic potential and long-term goals of achieving economic, employment and wage growth above the national average by 2030. The City Region currently lags the national average on all of these measures. Initial proposals put forward in the SEP include measures to:

- reverse decades of under-investment in strategic transport and housing
- provide a clean, cost-effective energy infrastructure taking advantage of the City Region's significant power generation cluster that produces 17% of England's electricity
- boost innovation, inward investment and export rates
- equip young people with the skills to compete in a fast-changing labour market

Leeds has also been successful in submitting a proposal to establish an Enterprise Zone². The Leeds Enterprise Zone encompasses four major sites in the Aire Valley Leeds regeneration area totalling 142 hectares of land and will be integrated with the on-going development of the Local Development Framework.

Vision for Leeds

The Leeds Initiative is the city's Local Strategic Partnership and brings together a wide range of people and organisations to work together to improve the city and overcome problems for the benefit for everyone. The overall framework is set out the Community Strategy 'Vision for Leeds 2011-2030'. Our Vision for 2030 is to be the best city in the UK. The LDF directly supports the implementation of this framework.

City Priority Plan

The City Priority Plan is a citywide partnership plan for 2011 – 2015 and has a vision that Leeds will be the best city in the UK. Priorities relevant to the implementation of the LDF include:

- Drive the Sustainable Growth of the Leeds Economy to support the creation of new jobs and skills
- Promote low carbon businesses, buildings, energy generation and connectivity across the city
- Maximise regeneration investment to increase housing choice and affordability
- Enable growth of the city whilst protecting the distinctive green character of the city

Best Council Plan

This sets out what the Council is doing do over the next few years to efficiently improve the quality of life for Leeds' citizens, especially those that are poor or vulnerable, in a context of significant budget savings. Several priorities are identified including:

- Dealing effectively with the City's waste
- Building a child friendly city
- Promoting sustainable and inclusive economic growth
- School places – meeting basic needs: ensure provision of sufficient local school places for all Leeds children
- Develop a coherent approach to meeting housing need

Leeds Unitary Development Plan Review 2006

The City Council's Unitary Development Plan Review (UDPR) was adopted on 19 July 2006. The UDP Review will be incrementally replaced as LDF documents become adopted. The UDPR will continue to be the statutory development plan for many saved policies in the future.

² Enterprise Zones are areas which encourage businesses and generate jobs, helping to rebalance the economy and drive local and national growth.

Local Development Framework progress

The Local Development Framework provides the spatial planning framework for the city. It is the key mechanism to deliver the spatial objectives of the wider policies discussed in the “Leeds Policy Context” section above.

The progress of the LDF is monitored through preparation of a Local Development Scheme (LDS). This sets out a three year rolling programme including timescales and milestones for the preparation of the individual Local Development Documents (LDD) which together form the Local Development Framework.

Table 1: Proposed Local Development Scheme Timetable (as at January 2014)

DPD	2013	2014	2015	2016
Natural Resources and Waste	Adoption	Consultation* Publication*	Examination* Adoption*	-
Core Strategy	Examination	Adoption (Autumn)	-	-
Community Infrastructure Levy Charging Schedule	Draft	Examination Adoption	-	-
Site Allocations Plan	Issues and Options Consultation (Summer)	Publication (Autumn)	Examination	Adoption
Aire Valley Leeds Action Plan	-	Publication (Autumn)	Examination	Adoption
Neighbourhood Plans**	Holbeck	Application for designation as neighbourhood plan area and forum		
	Kippax	Scoping issues		
	Otley	Drafting plan		
	Boston Spa	Drafting plan		
	Collingham	Drafting plan		
	Barwick & Scholes	Drafting plan		

* applies only to Minerals Policies 13 & 14 which were subject to High Court Challenge

** current (early 2014) position only for Neighbourhood Plans

Core Strategy

The emerging Core Strategy brings together the aspirations set out in the Vision for Leeds and provides a broad illustration of what the city will achieve by 2028. The Core Strategy highlights how and where development will occur, and those areas which are key to delivering the vision.

Since AMR 2012 a key milestone was reached with the Submission of the Core Strategy to the Secretary of State for Examination by the Planning Inspectorate in April 2013. The Examination took place during the course of 17 hearing sessions, the first of which was on 8th July 2013 and dealt with the Duty to Cooperate. The Inspector confirmed that the Council had satisfied the legal tests involved with the Duty i.e. that it had co-operated with prescribed bodies. Subsequent hearing sessions were then held during October 2013 and two hearing sessions are intended to be held in May 2014 on affordable housing and Gypsies and Travellers.

Main modifications to the Core Strategy will be advertised and once representations on these are received the Inspector will prepare his final report. This is likely to be received in the Autumn 2014 and the Council seeks to adopt the Core Strategy before the end of the year.

Natural Resources and Waste Plan

The Natural Resources and Waste Local Plan sets out where land is needed to manage minerals, energy, waste and water over the next 15 years, and identifies specific actions to help use natural resources in a more efficient way. The Natural Resources and Waste Plan was adopted by Leeds City Council on 16th January 2013. Following a high court challenge, policies Minerals 13 and 14 have to be re-examined and cannot be regarded as adopted policies.

Site Allocations Plan

The Site Allocations Plan will allocate sites to deliver the Leeds Core Strategy long term spatial vision, objectives and policies and ensure that sufficient land is available in appropriate locations to meet the targets set out in the Core Strategy. The Site Allocations Plan should 'follow on' from the adoption of the Core Strategy, but early work has progressed in parallel.

Following consultation (between June and July 2013) on a range of identified sites for housing, employment, retail and greenspace the Council received nearly 8,000 representations. Following analysis of these the Council will progress the Publication Draft stage once it is in receipt of the Core Strategy Inspector's Report. This is important as it will set the overall housing target, distribution across the district, the position on windfall development and phasing.

Aire Valley Leeds Area Action Plan

This DPD will provide the future planning framework to guide the regeneration of the Lower Aire Valley between Leeds city centre and the M1. The area contains over 400 hectares of development land which can help meet Leeds' need for housing and provide new jobs. A draft AAP will be published for formal consultation in Spring 2014.

Community Infrastructure Levy

The Community Infrastructure Levy (CIL) is a new levy which the Council will charge on developers or landowners when they build new developments. The money raised will help to pay for the infrastructure needed across Leeds such as schools, greenspace, flood defences, and transport improvements. The CIL will be charged per square metre on most new buildings, based on their use and location. Charges have to be based on viability. The Council has to ensure that there is an appropriate balance between the rates being high enough to help fund infrastructure, and not harming the economic viability of development as a whole across Leeds. In order to decide the rates for the CIL, the Council has produced an evidence base including an Economic Viability Study.

Consultation on a Draft Charging schedule was held during October to December 2013 and 41 representations were received. The CIL Charging Schedule will be submitted for Examination in Spring 2014 with a view to Examination during the Summer and Adoption in early 2015.

No decisions have yet been made as to the detailed arrangements of how and where a meaningful proportion of the CIL funds are to be spent, and spending issues are a separate work stream to the CIL Charging Schedule and evidence base.

LDF Policies Map

The LDF comprises a policies map which shows all the areas in the Leeds Metropolitan District where different policies will apply. For example, it will show those sites allocated for housing development, economic development or greenspace as set out in the Site Allocations Plan. The Policies Map will be revised as each new LDF document is adopted. As at January 2014, the Policies Map for Leeds is comprised of the Unitary Development Plan Review (2006) and the adopted Natural Resources and Waste Plan. This is available on the Council's web-site [link].

Neighbourhood Plans

Neighbourhood plans are a key part of the new planning system and give local communities the opportunity to prepare a statutory development plan for their neighbourhood. The Council has a 'duty to support' local communities in preparing neighbourhood plans, coordinated by the Chief Planning Officer with assistance from Area Support Teams as appropriate. The key roles for the Council are:

- Designation of neighbourhood areas/forums
- Support communities throughout the process
- Examination – organise and pay for
- Referendum – organise and pay for

The City Council has designated 23 Neighbourhood Areas (21 parished, 2 non-parished) and there are at least a further 20 non-parished areas that are considering whether a neighbourhood plan is appropriate for them. These areas are receiving varying levels of support dependant on local capacity and needs.

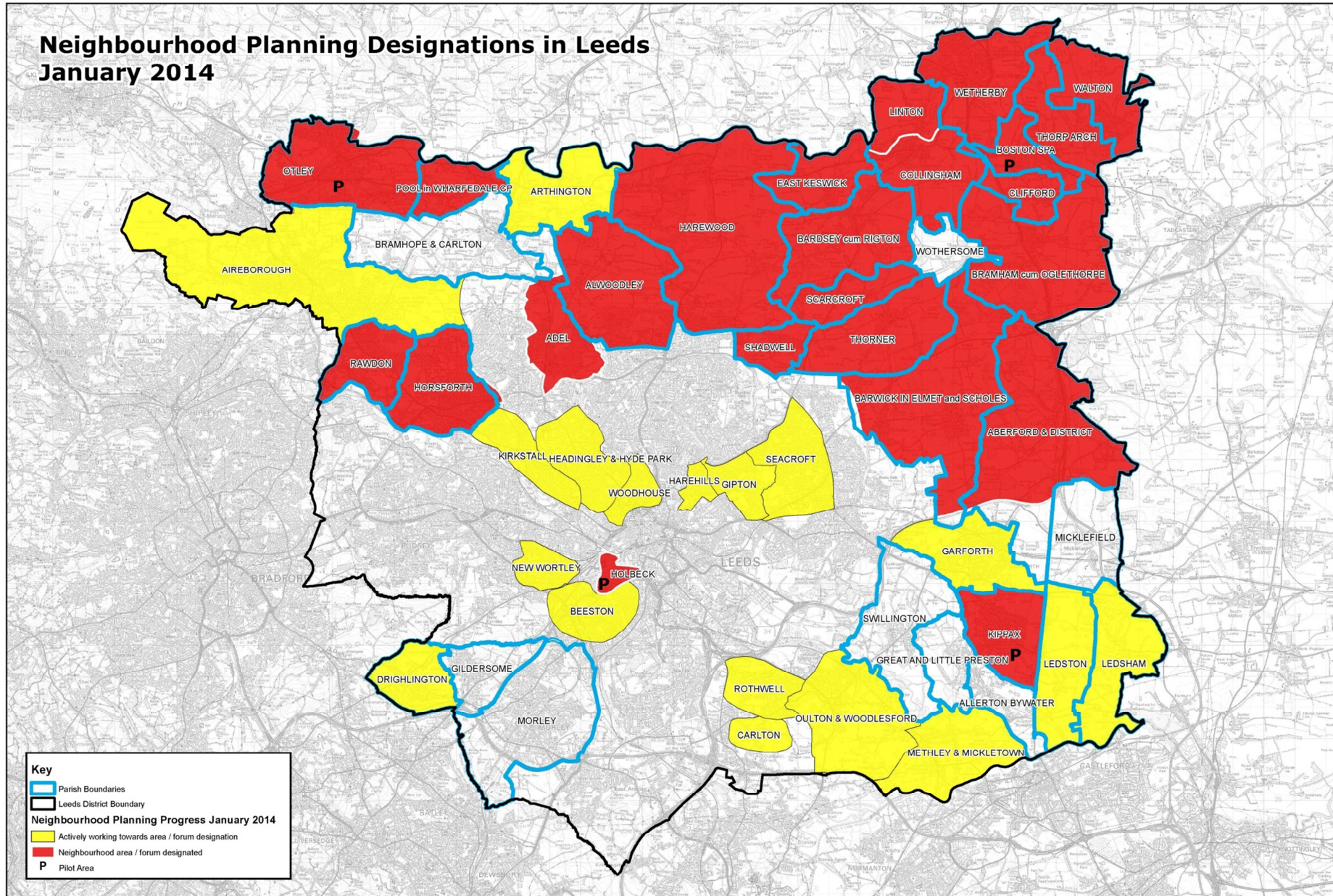
Of the four pilot areas in Leeds (Holbeck, Boston Spa, Kippax and Otley), Boston Spa and Holbeck are progressing well with their draft neighbourhood plans. Kippax and Otley are also progressing with arrangements to put plans in place.

The Council has successfully promoted neighbourhood planning in inner city areas as a means to achieve wider Council and community aspirations, with good progress being made in Holbeck, Beeston, Seacroft and Inner North West communities.

The Neighbourhood Planning Steering Group has continued to provide a joined-up and strategic overview of neighbourhood planning and to promote partnership working and good practice. Non-Council membership has been increased to include NHS Leeds, Planning Aid England, Civic Trust, Re'new, community representatives and Voluntary Action Leeds. Amongst other things, the steering group will be assisting with a non-parished neighbourhood planning event in the spring/summer.

Map 1 overleaf details those parts of Leeds which are designated as a neighbourhood planning area and those areas working towards area designation.

Neighbourhood Planning Designations in Leeds January 2014



Supplementary Planning Documents

Given priorities to urgently progress towards an adopted Core Strategy there has been reduced focussed on supplementary planning documents.

Village design statements and neighbourhood design statements are produced by local communities and supported by Leeds City Council, as a means of fostering good design, appropriate to its local context. A range of 18 Design Statements are in place and this past year saw five new statements (*) produced. There are currently 2 statements in preparation for Aberford and Moortown.

Adopted Village Design Statements

Adel	Hawkesworth	Linton and Collingham
Bardsey	Kippax	Thorner
Bramhope	Thorp Arch	
East Keswick	Horsforth	

Adopted Neighbourhood Design Statements

Far Headingley	Chapel Allerton*	Oulton & Woodlesford*
Headingley & Hyde Park	Little Woodhouse*	Roundhay*
Tranmere Park, Guiseley	New Farnley*	

Evidence base

A critical aspect of LDF work has been the completion and on-going preparation of evidence based studies to reflect the requirements of the NPPF (and recent National Planning Policy Guidance), issues raised during public consultation and advice from the Planning Inspectorate). For a city the size and complexity of Leeds, this has been a major undertaking and remains a very resource intensive activity. Major evidence base projects this past monitoring year include:

- ***Strategic Housing Land Availability Assessment***

The SHLAA Update 2012 was published in March 2012 and helped inform a five year supply of land for the period 2013/14 to 2017/18. Work is underway on the SHLAA 2013 Update and is expected to be published in Spring 2014.

- ***Five Year Supply***

The Five Year Supply for the past monitoring year was published in March 2013 following completion of the SHLAA 2012. This provided a five year supply of deliverable homes of 21,472 units against a housing requirement of 20,307 for the period April 2013 to March 2018. The five year supply was pertinent to three Section 78 planning appeals during 2013 at Thorp Arch, Outwood Lane, Horsforth and Bagley Lane, Rodley. Throughout the latter

two appeals modifications to the agreed supply level were made. The five year supply will be calculated for the period April 2014 to March 2019 following completion of the SHLAA 2013 Update in Spring 2014. It will be published separately on the Council's web-site.

- ***Objective Assessment of Housing Need***

As part of the preparation of the Core Strategy and the overall housing requirement for Leeds an objective assessment of housing need has been completed, including the Strategic Housing Market Assessment Update 2011 as well as further evidence to take account of the Census 2011 and most recent national population and household projections. Work commissioned from Edge Analytics reveals that:

- prior to the Census 2011 population and household projections over-estimated Leeds' growth and the population has been re-based at 751,000 as opposed to 800,000; however growth pressures remain significant
- an aging population, coupled with an increase in the birth rate is putting pressure on natural change in the population
- whilst the influence of international migration on housing growth in Leeds has reduced, the influence of economic in-migrants looks set to increase (stimulated by economic growth projections)

The Duty to Cooperate

The Localism Act 2011 introduced the Duty to Co-operate, which applies to specific bodies when they are preparing planning policies which address issues affecting more than one planning area. The duty applies to background evidence as well as the progression of policies. The most significant piece of work that the Council has undertaken recently was the final stage of the Core Strategy, including its submission and examination.

The table below summarises the actions that have been taken by the Council that could be considered to meet the duty to co-operate since the introduction of the Localism Act. It includes co-operation initiated by other bodies whose strategic planning affects the Leeds area.

The Duty to Cooperate is still a relatively new legal requirement albeit that Leeds has operated jointly with its neighbours and partners for many years. One of the initial tasks has been the establishment of appropriate structures to ensure that the Duty is met. The Council chair a City Region Executive Member Group and officer group. These work alongside a Heads of Planning group which in turn supports a Board with representation from the Leaders of the LCD local authorities.

In general these arrangements are a conduit for comments on development plans in production across the LCR area and dealing with shared issues (including evidence). Further detail on the duty to cooperate arrangements are available in a background paper to the Core Strategy tabled at the Examination³.

³ <http://www.leeds.gov.uk/docs/CD23%20Duty%20to%20Cooperate%20Background%20Paper.pdf>

Table 2: Duty to Cooperate Activities 2012 - 2013

Strategic issues considered	With whom was the issue discussed and how	Outcome of the discussion	Geographical scale of the issue
Leeds Submission Core Strategy	Core Strategy Inspector and representors at a hearing session in July 2013	Letter from the Inspector 2013 clarifying that Core Strategy fulfils legal requirements of Duty to Cooperate	Leeds District and wider Leeds City Region
Sub-Regional Housing Markets	Neighbouring authorities Heads of Planning	Commissioning of evidence base work on sub-regional housing markets and approaches to objective assessment	Leeds City Region
Kirklees Core Strategy	Kirklees Metropolitan Borough Council and their Inspector at an exploratory meeting on 18 th September 2013	Pending further cooperation following the withdrawal of the Kirklees Core Strategy	Leeds Kirklees MBC
Local Aggregates Assessment	Heads of Planning	Draft WY Local Aggregates Assessment	West Yorkshire and LCR
Gypsies and Travellers	Duty to Cooperate Group at various meetings	Seeking alignment of assessment methodologies used across LCR	Leeds City Region

Monitoring Indicators

As outlined the Localism Act 2011 and the subsequent Local Planning Regulations 2012 have removed the requirement for local planning authorities to submit an Authority Monitoring Report to the Secretary of State, whilst retaining the overall duty to monitor. The primary purpose of the AMR is now to share the performance and achievements of the planning service with the local community, at least once every 12 months. Authorities can largely choose for themselves which targets and indicators to include in the report provided they are in line with the relevant UK and EU legislation.

Monitoring helps to address key issues, including:

- are policies achieving their objectives?
- have the predicted effects on sustainability objectives actually occurred?
- are policies delivering sustainable development?
- have policies had unintended consequences?
- are the assumptions behind policies still correct?
- are targets being achieved?

Significant effects indicators

'Significant Effect' indicators are those that were identified through the Sustainability Appraisal (SA) of emerging Core Strategy policies; they will measure those aspects of the socioeconomic and environmental context that are likely to be significantly affected by the policies in the Core Strategy, although they will in most cases also be influenced by factors other than planning, e.g. health, education and crime strategies. However, by attempting to measure the social, environmental and economic impact of plans in this way, monitoring will help to ensure that planning policies are as sustainable as possible. The Core Strategy SA notes that several SA objectives are predicted to have significant negative effects:

- SA11 – minimize the pressure on greenfield land by efficient land use patterns that make good use of derelict and previously used sites and promote balanced development
- SA12 – maintain and enhance, restore or add to biodiversity or geological conservation needs
- SA13 – reduce greenhouse gas emissions
- SA18 – reduce pollution levels
- SA19 – maintain and enhance landscape quality

The City Centre

Leeds city centre performs a key economic, strategic and cultural role at the heart of the Metropolitan District and the Leeds City Region. It is approximately 460 hectares in area (less than 1% of the area of the District as a whole) yet attracts a quarter of all employees who live and work in Leeds. The city centre is a focus of jobs, shopping and housing and the Core Strategy sets targets to be accommodated over the plan period as follows. The Council has prepared a City Centre Audit annually since 1998, which has charted some significant changes – more information on the city centre is contained in this report available on the Council’s web-site⁴.

Offices

There was little new office development in the city centre during 2012/13. However, construction has started on an office building pre-let to KPMG in Sovereign Street – the largest new build office in Leeds city centre since 2006. The development, which is due for completion in autumn 2014, is the first of three buildings proposed around a new area of green public realm on Sovereign Street which is being developed by Leeds City Council. Some of Leeds’ prime office sites have also been recently refurbished and together with major mixed-use schemes such as the Caddick development at Quarry Hill and new stand-alone provision at Whitehall Riverside and City Square House provide a well-located and healthy pipeline of provision.

	Target 2012 - 2028	Completed 2012/13
Net additional office floorspace	655,000 sqm	300 sqm

Office take-up from the existing stock during the calendar year of 2013 was 74,119 sqm; significantly higher than 37,161 sqm in 2012 and significantly in excess of a ten year average of 43,850 sqm. This is a positive sign that demand for city centre office accommodation is recovering from recession and that Leeds is an attractive location. There is outstanding capacity of office permissions in the city centre for 90,412sqm and as at December 2013 4,350 sqm was under construction. However, market commentators have expressed concern that the quantity of quality Grade ‘A’ stock may be low i.e. of the 90,412 sqm of outstanding office capacity only 28,000 sqm is considered as Grade ‘A’. This situation will be monitored through the coming year.

A return to speculative office development (as seen in 2006 and 2007) seems unlikely and office developers are more likely to pre-let buildings prior to commencement of development⁵.

Homes

The monitoring period saw an increase in the number of homes completed in the city centre compared with only 50 dwellings the year before. The uplift was largely due to the completion of two large schemes; 85 flats at Crispin House on New York Road and 125 units as part of a new student

⁴ <http://www.leeds.gov.uk/Business/Pages/Economic-information.aspx>

⁵ 11th City Centre Audit

accommodation campus on Calverley Street. Indeed, completions for the first half of 2013/14 rest at only 49 dwellings.

	Target to 2028	Delivered 2012/13
Homes	10,200 dwellings	318

The impending site allocations document will identify sites for housing in the city centre and developers are bringing forward a mixture of new schemes and models e.g. the Otter Island development comprising maisonettes as well as flats.

There are also signs that Leeds city centre is becoming attractive to the market emerging from recession with 108 student flats under construction at St Marks in Woodhouse and 115 dwellings under construction elsewhere on three sites. A recent housing analysis⁶ forecasts that Leeds' city centre housing market has become more vibrant in 2013 and will grow quickly. Evidence is that enquiries have increased by over 50% and sales rates have doubled. Despite being one of the lowest completions levels over the past ten years there are signs that the city centre housing market is diversifying because proportionately more of the flats were 3 bedrooms or more.

Retail

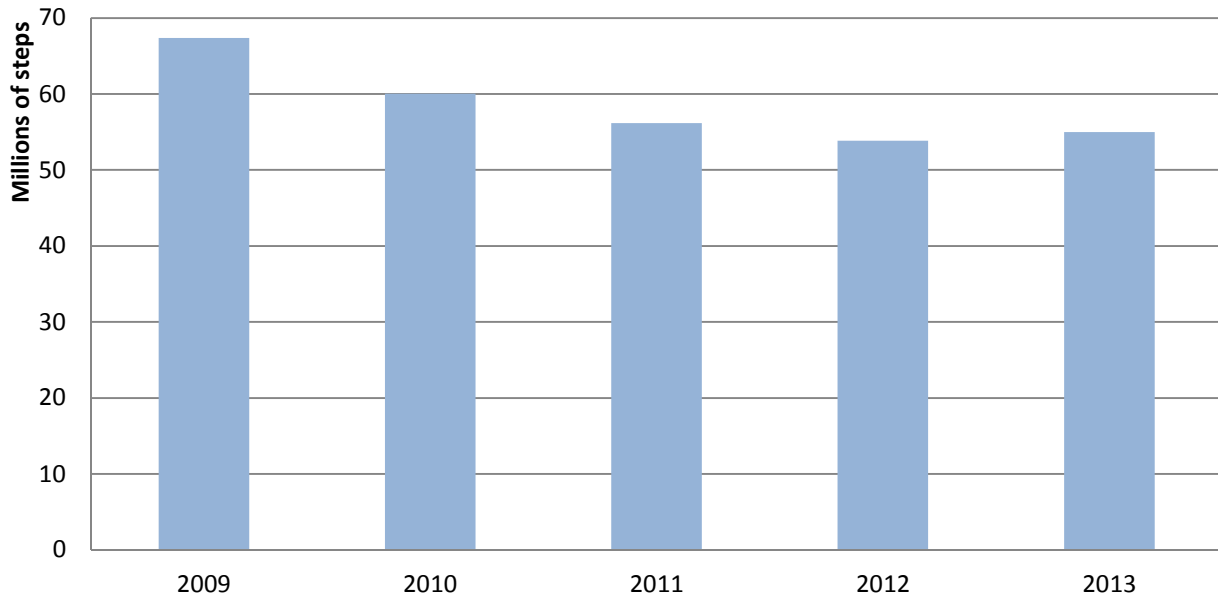
Development in the City Centre was marked by the three flagship developments of the Leeds Arena, Trinity Leeds and Victoria Gate. The £350 million retail development Trinity Leeds opened its doors in the Summer 2013. Hammerson, the retail developer behind Victoria Gate, received approval of its £130million development in September 2013. As well as more than 30 retailers, the development will anchor a 24,000m² John Lewis store and multistory car park for more than 800 cars. The Leeds First Direct Arena opened in July 2013.

Figure 1 shows that footfall throughout the city centre increased following the opening of Trinity Leeds and the First Direct Arena, from 53.8 million steps to nearly 55 million steps; reversing a downward trend that has been seen since the start of the financial crisis in 2008/09. Whilst the improvement of the economy in 2013 may contribute to increases in footfall, figures from Experian's Footfall Index suggest that nationally footfall has continued to fall throughout 2013, suggesting the improvements in Leeds' City Centre, can be attributed to the impact of the opening of Trinity and the First Direct Arena.

The wider impacts of Trinity Leeds will be assessed by a focus on vacancy of city centre retail units which will be reported in the 2014 AMR.

⁶ [Jones Lang Lasalle \(2013\) Change to Amber: The Northern England residential development market](#)

Figure 1: Footfall in the city centre – by millions of steps per calendar year



* data collected from 8 CCT cameras across the City Centre

Integrating the city centre

The Core Strategy aims to integrate and improve connections between the north and south halves of the city centre. This past year three key developments within the South Bank help achieve these ambitions:

- Leeds Station Southern Entrance: The Transport and Works Act Order (TWAO) has been approved by the Secretary of State. Full approval of the Major Scheme Business Case (MSBC) is to be submitted to allow the start of works in 2014.
- Holbeck Urban Village: Further engagement has taken place with landowners on the development of a new masterplan.
- Development of Leeds Station - Network Rail published a masterplan for the station which now includes increased retail provision, better access from New Station Street and 350 extra parking spaces
- Flood Alleviation Scheme. The Council successfully bid for Regional Growth Fund monies to help provide flood defences in the City Centre and Holbeck. Planning permission for the £50million scheme has recently been granted.

Vibrancy, character and cultural appeal

The Core Strategy aims to improve the vibrancy, character and cultural appeal of the city centre. Experian's Inner City Vibrancy rankings identified 75 key urban areas within London boroughs and cities across England and Wales based on 2011 Census data. The Inner City Vibrancy rankings give what Experian believes is a measure of how vibrant our cities are in terms of having a young, affluent resident population and how this inner city vibrancy has changed over time. Leeds came fifth in the rankings and is one of only four non-London centres within the top ten; the others are Manchester (which came first), Canterbury and Lancaster.

At the same time it will also be important to monitor how the city centre's vibrancy is changing as a result of attracting more families to live and recreate. In future years as the housing market improves this could be reflected through changing types of city centre properties being built e.g. more family housing. In addition, with developments such as the First Direct Arena completed it will be important to gauge the difference made to a wide range of Leeds residents.

The City is also hosting the Tour de France 2014 Grand Départ, which will be the biggest event hosted in Leeds in living memory.

Hotels

According to Industry research Leeds hotels in November 2013 continued their strong recovery and achieved the highest performance growth recorded in absolute figures over the last four years with an 11% increase in total revenue and a 22% gross operating profit per room⁷. Occupancy rose by 6% to 83%. With the start of the Leeds Hilton Arena hotel in 2013 due to open in 2016 the sector shows signs of continuing recovery and growth.

Managing the needs of a successful district

Housing

The Council has worked emphatically over the past few years to boost the supply of housing in the District through a range of measures:

- the submission Core Strategy proposes a target of 70,000 new homes (net)
- further to the release of greenfield housing allocations (with potential for over 7,000 homes) the Council has also provided policy guidance on the early release of some Protected Areas of Search in advance of the Site Allocations Plan
- the Council has established a Housing Investment Land Strategy, through which activities are being co-ordinated to bring forward all brownfield sites with residential development potential. During 2012/2013 7 sites have been sold or committed through this work, with capacity for development of 195 new homes. It is anticipated that over the remainder of 2013/14 and 2014/15 sites will be sold or committed with capacity for further 750 new homes.

Yet as the analysis below shows, there continues to remain a gap between the supply of housing land and the delivery of homes. Leeds is a large District with distinctive and different spatial attributes and a range of housing needs spread from regeneration areas in the inner areas to high demand outer areas with some of the highest house prices in the region.

The supply of housing

The housing requirement for Leeds since 2012/13 is set out in the Core Strategy Submission Draft as summarised below.

⁷ Industry research by Hotstats

Table 3: Core Strategy Net Housing Requirement			
Period	Start of period	End of period	Total housing required
Plan period	1st April 2012	31st March 2028	70,000

Table 4: Submission Core Strategy Net housing requirement 2012/13 to 2027/28	
Year	Net annual requirement
2012/13 – 2016/17	3,660
2017/18 – 2027/28	4,700

Demolition rates

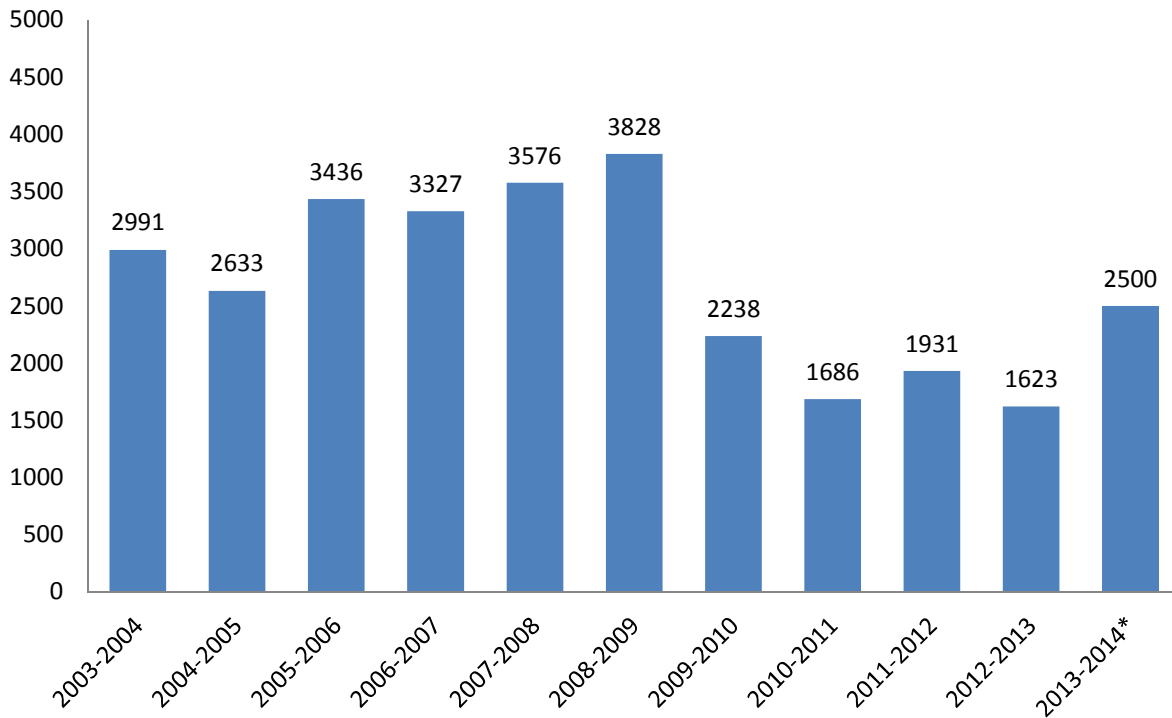
The Core Strategy Submission Draft suggests that a gross figure for housing will be 250 units per annum above the net figure. This is based on estimated levels of demolitions occurring within the City i.e. the difference between a gross and a net housing figure. The average level of demolitions over the last 10 years has been 250 per annum. However the annual average rate of loss between 2008 to 2013 has been just 142 dwellings, with only 27 demolitions in 2012/13. If this continues, it will moderate the gross house building requirement in future years and will need to be closely monitored. At a recent planning appeal it was common ground that the approach in the 2012 five year supply had overemphasised the level of demolitions to be expected in the City. The Council will continue to use a five year average rate of demolitions for the purposes of calculating a five year supply. Future AMRs will need to take a view on whether the rate of demolitions is likely to increase to such an extent that the 250 plan period average is realistic. A range of factors will contribute to such a rate including increases in public sector finance for large scale regeneration and renewal projects.

The delivery of housing

In 2012/13 the total amount of net additional dwellings delivered fell to 1,623 units. Whilst the economy was beginning to emerge from recession this slight fall was as a result of the particular bad and extended winter in 2012/2013 which slowed delivery on site. However signs are (based on the first three quarters of 2013/14) that completions will reach approximately 2,500 homes signalling a significant increase in house building.

Table 5: Net additional dwellings				
2008/09	2009/10	2010/11	2011/12	2012/13
3,828	2,238	1,686	1,931	1,623
Year	Total	Target	% Target	Indicator
2012/13	1,623	3,660	44.3%	

Figure 2: Net additional dwellings over the past ten years



* estimate based on first three quarters of 2013-14 monitoring year

The majority of housing delivery is in the Main Urban Area where 74% of the net change of additional dwellings occurred. A further 13% was located in Major Settlements and 5% in Smaller Settlements. In addition, 119 units (7%) were built outside the Settlement Hierarchy in Villages/Rural locations which comprise small windfall sites fewer than 5 units together with the conversion of existing dwellings and other buildings.

Table 6: Net additional dwellings by location within the Settlement Hierarchy

Location	Total housing gain (gross)	Demolished and/or lost units	Total change (net)	% of Total change (net)
Main Urban Area	1,230	23	1,207	74
Major Settlements	216	1	216	13
Garforth	25	0	25	2
Guiseley/Yeadon/Rawdon	106	1	105	6
Morley	67	0	67	4
Otley	4	0	4	0
Rothwell	10	0	10	1
Wetherby	4	0	4	0
Smaller Settlements	82	0	82	5
Villages/Rural	122	3	119	7
Total	1,650	27	1,623	100

Within the main urban area the Inner Area accommodated more new housing than any other Housing Market Characteristic Area with 407 units built, equating to 25% of total net delivery. City Centre (18%), Outer West (14%) and Outer South West (14%) provided locations for a significant level of delivery. Outer North West (0%), Outer South (1%), Outer North East (3%) and Outer South East (4%) were the lowest contributing areas towards total delivery. These are positive signs and signals that despite market pressure on the outer areas of Leeds there remains a proportionately healthy delivery of homes in the main urban area in accordance with the spatial policies of the Core Strategy.

Table 7: Net additional dwellings by Housing Market Characteristic Area

Location	Total housing gain (gross)	Demolished and/or lost units	Total change (net)	% of Total change (net)
Aireborough	162	1	161	10
City Centre	298	0	298	18
East Leeds	70	1	69	4
Inner Area	422	15	407	25
North Leeds	133	5	128	8
Outer North East	44	2	42	3
Outer North West	5	0	5	0
Outer South	20	0	20	1
Outer South East	65	0	65	4
Outer South West	203	1	202	12
Outer West	228	2	226	14
Total	1,650	27	1,623	100

In reflecting corporate and regeneration priorities a high proportion of development has been delivered on brownfield land. Over 80% of development has been brownfield in every quarter since March 2002 and the proportion had exceeded 90% up until last year. In recognition of the need to diversity the supply of land for housing and boost delivery the Council has taken a series of steps to release greenfield land.

- In June 2011, the Council's Executive Board agreed to release Phase 2 and 3 housing allocations in the UDP. There were 35 sites released at the time with a total capacity of 7,175 units, all of which were greenfield.
- In March 2013 the Council's Executive Board agreed to an interim policy approach to the release of Protected Areas of Search in advance of the Site Allocations Plan.
- The Core Strategy sets a PDL target of 65% between 2012 and 2017 and 55% thereafter
- The Site Allocations Plan is seeking to undertake a selective Green Belt review so as to ensure that sufficient land is available for future housing provision

Table 8: New and converted housing units on Previously Developed Land

Period	Gross dwellings	Number PDL	% PDL	Target	Indicator
2008/09	3976	3787	95%	65%	
2009/10	2519	2341	93%	65%	
2010/11	1839	1682	91%	65%	
2011/12	2032	1931	85%	65%	
2012/13	1650	1439	87%	65%	
Last 5 years	2,403	2,236	93%		
Last 10 years	2,947	2,724	92%		

The number of outlets which have started on site as at 30 September 2013 sits at 95. These outlets have completed 1,569 homes and have 1,810 units remaining (according to planning permission capacities). Between 1 October 2012 and 30 September 2013, the Council recorded completions across 82 sites with an average build out rate of 19 units. This means that in order to meet Core Strategy targets (3,660 homes per annum) there would be a need at average build out rates to have 193 outlets under construction at any one time.

Build out rates differ depending on the size of site and its characteristics. Looking only at the Phase 3 greenfield UDP Review sites which were approved on appeal during 2010 and 2011 the average build out rates rest at 27.5 units per annum.

At this build out rate there would need to be just over 130 outlets under construction at any one time. In order to deliver the Core Strategy housing requirement there is a need for more sites to start and for build out rates to increase on sites.

Outstanding Housing Capacity

There remained at 30th September 2013 outstanding capacity for just over 12,000 units with full planning permission and 6,700 units with outline planning permission. In addition there remains capacity for 7,650 units on allocated sites in the UDP Review. In total this equates to over 26,500 homes. Whilst it may not be possible for all of this capacity to be completed in the short-term, it is a healthy position, as a recovering housing market should improve the rate of delivery..

Windfall

Windfall sites are those which have not been specifically identified as available in the Local Plan process. Since the introduction of the Leeds Strategic Housing Land Availability Assessment (SHLAA) windfall emerges largely as smaller sites. The Core Strategy estimates that 500 dwellings per annum will come forward as windfall. 428 units delivered were classified as non-SHLAA windfall in the 2012/13 monitoring period, making up 26% of total completions across the district.

Table 9: Housing completions by land type		
Classification of site	Completions	FYS category
New build < 5 units	77 (gross)	Windfall
Conversions < 5 units	281 (net)	Windfall
Land Availability Sites	70 (gross)	Windfall
Total windfall	428 units	Windfall
SHLAA sites	1,222 (gross)	Identified sites
Total	1,650 (gross)*	
Windfall % of total	26%	

*Gross = gross new completions and net conversions

Permitted Development

The Government has sought to increase the supply of housing by making it easier to change the use of offices and agricultural buildings to dwellings. As at the end of 2013 only a handful of applications have been approved through this route totalling 115 dwellings.

Density of New Housing Sites

A baseline will be established in 2013/14 to measure the density of new housing permissions by settlement hierarchy location, to ensure that they represent the best use of land and are promoting sustainable development. The red line boundary of a planning permission will be used and sites will be assessed during the year in which they obtain planning permission..

Housing Type and Mix

Between 2005 and 2010, housing mix had been characterised by a dominance of flats and apartment building. In 2010/11 more houses were completed than flats and apartments for the first time since 2005/6. The completion on flats and apartments has picked up since 2010/11 and continues to make a significant contribution to overall delivery in both 2011/12 (57%) and (50%) 2012/13.

The number of bedrooms in new dwellings provides an indication of the size and type of dwelling developed. This information is important to ensure that the appropriate housing mix is being developed. The most recent population forecasts and the Census suggest that average household size is decreasing and the number of individual households is increasing but not necessarily as rapidly as was previously forecast. The SHMA identifies housing need based on forecasted demographic changes. The Strategic Housing Market Assessment (SHMA) assesses affordability issues and relates the findings to housing viability. The SHMA concluded that over the life time of the plan that Leeds should look to deliver a range of housing sizes (as measured by bed types).

Table 10: Mix of housing units delivered each year by housing type and number of bedrooms

Year	Flats / Maison's	Housing units (includes bungalows)			Total
		Terrace	Semi detached	Detached	
2012/13	827	366	144	313	1650
% Delivery	50%	22%	9%	19%	100%
Type	Number of bedrooms				Total
	1	2	3	4+	
Flats/Maisonettes	343	335	49	100	827
Houses/Bungalows	15	111	360	337	823
Total	358	446	409	437	1650
% Delivery	22%	27%	25%	27%	100%
SHMA Need Identified	8%	55%	27%	10%	100%

NB: Percentages may not total 100% due to rounding

In 2012/13, 3 and 4+ units represented a large share of completions due to the completion of large semi-detached and detached houses. Two bedroom properties continue to dominate development due to the developments of flats and apartment. As compared to the need identified in the SHMA, there is a general over provision in units with 4+ beds and an under provision of 1 and 2 bed properties. This reflects market choices but compounds the difficulties faced by first time buyers.

Affordable housing

360 affordable housing units were completed in the past year. Of the 360 units, just 72 were delivered through Section 106 Agreements with 199 through grant assisted schemes and 155 through Government initiatives. In addition, 14 affordable units were built with no grant assistance outside social housing model for delivery.

The affordable housing delivery rates also place emphasis on the ability of the market to purchase housing. Overall 1650 units (gross) were completed in the past year. If we deduct the number of units that were grant funded, we are left with a private market development rate of 1296 units (1650 minus 119 grant assistance & 155 Government initiatives). This means that 79% of all housing completions were delivered through private schemes. The 2011 Strategic Housing Market Assessment reviewed ability to buy and noted that over the life of the plan, it is expected that only 65% of all housing need will be met by market forces.

The Council is taking proactive steps to remedy this situation through a number of programmes: direct council house building, identifying sites for registered providers in order to streamline approvals and a brownfield land programme whereby more efficient use is made of Council assets and sites are unlocked for development.

Table 11: Gross affordable housing completions				
Period	Social rented	Intermediate	Affordable rent*	Total
2008/09	157	253	N/A	410
2009/10	84	329	N/A	413
2010/11	341	438	N/A	779
2011/12	279	216	N/A	495
2012/13	82	255	23	360
Period	Section 106	Grant assisted	Government initiative	Non assisted^
2011/12	54	308	133	N/A
%	11%	62%	26%	N/A
2012/13	72	119	155	14
%	20%	33%	43%	4%

*affordable rent is a new social housing model starting in 2012/13

^non assisted completions are units which have been delivered with no grant assistance and are now monitored separately starting in 2012/13

Older Persons Accommodation

The number of older people as a proportion of the population is increasing and demographic changes will place additional demands for services at a time of diminishing financial resources. The Council is progressing a "Better Lives for Older People" programme, which involves considering the quality and quantity of residential care homes against current and future needs. Monitoring of specific older persons housing provision involves understanding specific as well as general housing provision e.g. whether new homes are of the right type and are sufficiently adaptable. Future AMRs will pick this issue up in more depth. Two new schemes were completed during 2012/13 as shown below.

Table 12: Total number of C2 housing units delivered per annum		
Planning Ref	Location	Units
10/01593/FU	Wetherby Health Centre, St James's Street	66
10/04941/LI	The Grange, York Road, Seacroft	96
Total		162

Gypsies, Travellers and Travelling Showpeople

The Council maintains a site for Gypsies and Travellers at Cottingley Springs, Gildersome with 41 pitches and is (subject to the consent of the Secretary of State) progressing an extension to this to provide for 12 additional pitches alongside improvements to the existing services. There are currently no authorised plots for Travelling Show people within Leeds, although there are currently 7 families living with the consent of landowners.

Table 13: Total number of Gypsy and Traveller plots in the District		
Type	Site	Pitches
Public provision	Cottingley Springs	41
Private provision	Nepshaw Lane	1
	Rose Neath	1
	Ninevah Lane	2
	Knotford Knook	1
	Springfield Villas	2
Total provision		48

In order to determine an up to date level of identified local need for the plan period, the City Council is working with Leeds Gypsy and Traveller Exchange to identify needs. These will be established in the Core Strategy once it is adopted and help inform the Site Allocations Plan. Provision of the need will be monitored in subsequent AMRs.

Vacancy rates

A healthy housing market has vacancy levels within it as it allows churn (a rule of thumb is that a 3% vacancy rate is appropriate in a healthy housing market). Vacancy rates allow choice within the market and that a property can sit empty for a short period of time between residents. If the vacancy rate rises alongside new development, there is concern that the new development is not helping the housing market. In such a case, a review of demand for housing, alongside knowledge of vacant housing stock, will be required. The long term⁸ vacancy rate in 2012/13 is 4.3%.

The Leeds Empty Homes Strategy is helping to bring on average nearly 3,000 homes per annum back into use. More information, including an area by area breakdown of vacancies, is available on the Leeds Empty Homes web-site [link].

Table 14: % of empty homes (as measured through properties classified as long term vacant)	
Type	Total
Number of properties	335,643
Number of empty properties	14,541
% of empty homes	4.3%

⁸ Longer than 6 months

Vacancy rates are higher in the city centre than elsewhere in the District. This is symptomatic of a substantial proportion of dwellings classified as second homes. In 2010 vacant homes (including second homes) stood at 14% and in 2013 the figure had dropped to 10%. If second homes are stripped out of the calculations the vacancy rate in the city centre falls to 5%.

Employment

Total new construction for employment has decreased from 38,370sqm to 15,625sqm characterised by a lack of large scale employment completions this year. During 2011/12, two single developments contributed 22,890sqm (60%) to the total development figures of 38,370sqm. This included an extension to the Arla Foods Dairy in Stourton (14,890sqm) and a change of use of a contract vehicle storage depot in Hunslet (8,000sqm).

In contrast, the largest single developments in 2012/13 were a new build workshops and office (2,400sqm) at Peckfield Business Park, Mickelfield, and a change of use from a vacant unit to a MOT testing station (1,620sqm) on Lotherton Way, Garforth.

Despite the generally low level of B2/B8 activity, it is encouraging to record that B1a Office activity has almost doubled since last year. This included the erection of a four storey office block (1,300sqm) at the Cubic Business Centre, Stanningley Road, Stanningley.

Year	B1 Office		B1 Other		B2 Industrial		B8 Warehouse		Total	
	Area (ha.)	Floor space (sqm)	Area (ha.)	Floor space (sqm)	Area (ha.)	Floors pace (sq m)	Area (ha.)	Floor space (sqm)	Area (ha.)	Floor space (sqm)
2008/09	6.24	51475	0.11	190	2.17	7550	1.86	4200	10.38	63415
2009/10	3.40	29140	0.00	0	1.91	8410	1.34	4620	6.65	42170
2010/11	2.68	5166	0.86	2340	11.10	3900	0.63	500	15.27	11906
2011/12	1.75	1680	3.25	1025	25.24	25695	2.60	9970	33.02	38370
2012/13	1.43	3230	0.20	600	3.16	7840	2.04	3955	6.83	15625
5 year avg	3.10	18138	0.88	831	8.72	10679	1.69	4649	14.43	34297

Employment development within the core strategy settlement hierarchy

The settlement hierarchy is being established in the Core Strategy, with the aim of guiding the overall pattern of development across the District for the period up to 2028. The hierarchy guides the pattern of employment development so as to ensure that new developments are in sustainable locations.

The majority of development (7,900sqm) occurred within the Main Urban Area which included 1090sqm change of use from a double glazing manufacturer (B2) to a warehouse (B8) in Sheepscar, and 800sqm of new build industrial units (B2) at Long Close Industrial Estate in Burmantofts. Almost all B1a office developments (96%) occurred within the Main Urban Area. This included a 1,300sqm office block at the Cubic Business Centre in Stanningley but levels of completions in the city centre were low (see city centre section above).

Major Settlements accounted for 2,930sqm of development which included a change of use from a vacant unit to a MOT testing station (1,620sqm) on Lotherton Way, Garforth.

Development within the Smaller Settlements was 3,315sqm in total. This included new build workshops and office (2,400sqm) at Peckfield Business Park, Mickelfield.

Table 16: Completed employment floorspace (2012/13) by settlement hierarchy					
Sector	Size*	B1 Office	B1 Other	B2 & B8 Industrial	Total
Garforth	Area (ha)	0	0	0.58	0.58
	Sqm	0	0	1870	1870
Otley	Area (ha)	0	0	0.57	0.57
	Sqm	0	0	540	540
Guiselley/Yeadon/Rawdon	Area (ha)	0.1	0	0.51	0.61
	Sqm	100	0	420	520
Wetherby	Area (ha)	0	0	0	0
	Sqm	0	0	0	0
Morley	Area (ha)	0	0	0	0
	Sqm	0	0	0	0
Rothwell	Area (ha)	0	0	0	0
	Sqm	0	0	0	0
Major Settlements	Area (ha)	0.1	0	1.66	1.76
	Sqm	100	0	2830	2930
Main Urban Area	Area (ha)	1.33	0.14	1.18	2.65
	Sqm	3130	500	4270	7900
Smaller Settlements	Area (ha)	0	0.06	2.21	2.27
	Sqm	0	100	3215	3315
Other	Area (ha)	0	0	0.15	0.15
	Sqm	0	0	1480	1480
Total	Area (ha)	1.43	0.2	5.2	6.83
	Sqm	3,230	600	11,795	15,625

* Area (ha) relates to size of the site boundary whereas sqm relates to gross internal floorspace

The re-use of employment land

There has been a slight increase in the amount of employment land lost to other uses over the past year (11.74ha) compared with 11.12ha lost in 2011/12. This included a change of use of an industrial unit (B8 Warehouse) on Milshaw Park Drive, Beeston, to an indoor football facility (D2 Leisure) with a loss of 4,580sqm of internal floorspace and 1.25ha of land.

Housing continues to represent the largest single sector of re-use, accounting for 9.6ha. This source of supply will contribute 466 housing units once completed. This includes 192 units at Menston Lane in Cross Gates, and 112 units at Russell Street (LS1). In future years the AMR will address the prior approval process of office to housing in detail. Since Summer 2013 just over 100 homes have been approved through this process from office developments.

3.15ha of employment land has been gained from Previous Developed Land (PDL) compared with only 0.97ha gained in the previous year. This included a new build office and workshop at Peckfield Business Park (1.55ha).

The results for 2012/13 have reversed the yearly decline of gains since 2009/10. As with previous years, all gains were from brownfield sites with no gains from greenfield sites.

Table 17: Losses and gains of employment land to / from other land uses 2012/13		
Loss to/Re-use for	Ha.	No. sites
Housing	9.6	15
Retail/other commercial	0.01	1
Other	2.13	8
Total loss: 2012/13	11.74	24
Total loss: 2011/12	11.12	32
Total loss: 2010/11	9.54	35
Gain from	ha.	No. sites
Greenfield sites	0	0
PDL not employment use	3.15	11
Total gain: 2012/13	3.15	11
Total gain: 2011/12	0.97	4
Total gain: 2010/11	1.82	7
Net loss (gain) 2012/13	8.59	13
Net loss (gain) 2011/12	10.15	28
Net loss (gain) 2010/11	7.71	28
Note: Losses/gains are based on the start of development		

The Leeds Economy Handbook⁹ provides monitoring information on the state of the economy in Leeds including on vacancies, unemployment and economic growth potential.

Retail and Leisure development

Retail and leisure development has in general continued to be affected by the recession with a few notable exceptions.

As part of the Council's Vision for Leisure Centres the £28m Holt Park leisure centre opened in December 2013.

⁹ <http://www.leeds.gov.uk/Business/Pages/Leeds-Economy-Handbook.aspx>

Development in the City Centre performed strongly marked by the three flagship developments of the Leeds Arena, Trinity Leeds and Victoria Gate. These are detailed in the city centre section above.

Elsewhere in the District there were only 9 new A1 retail floorspace completions in 2012/13 compared with 21 completions recorded in 2011/12. The majority of these developments were minor extensions (less than 100sqm). Therefore, there has been a major reduction in completed retail floorspace to 1,360sqm for this year, a reduction of 84%.

For contrast, it should be noted that the retail figures for 2011/12 (8,385sqm) were inflated by two new developments with a combined floorspace of 5,770sqm (a 2,900sqm extension to an industrial unit at Crown Point, and the addition of a 2,870sqm mezzanine floor to a retail unit at Westside Retail Park, Guisley).

The Asda foodstore in Middleton is under construction and will complete in May 2014. In addition Aldi in Middleton will complete in March 2014. Elsewhere in the District there are no other foodstore starts, which is symptomatic of a general slowdown in supermarket construction especially larger than 25,000 sqft. This is matched by an increase in small local convenience stores by the major supermarket operators and “click and collect” services from existing outlets coupled with an upturn in on-line grocery shopping. The impacts of these significant changes in shopping habits and market provision will be monitored throughout the coming year and reported in the 2014 AMR. There may be particular impacts on town centres.

There were also fewer completed leisure developments in 2012/13, 5 sites, in comparison to 24 sites completed in 2011/12. Leisure developments have reduced by 63% to 6,730sqm in 2012/13 compared to 17,860sqm in 2011/12. However, the Everyman Cinema was completed in Summer 2013 and will factor in the next AMR floorspace figures.

During the 2011/12 period, there were six developments above 1,500sqm, with a combined total of 13,365sqm. In 2012/13, only two development were above 1,000sqm. These were a change of use of vacant warehouse to a gymnastics centre (1,580sqm) in Seacroft, and a change of use from a warehouse to an indoor football facility (4,580sqm) in Beeston.

Use Class	2012/13		2011/12	2010/11	2009/10	2008/09
	Floorspace (sq m)	Area (.ha)	Floorspace (sq m)	Floorspace (sq m)	Floorspace (sq m)	Floorspace (sq m)
A1 Retail ¹⁰	1360	0.37	8385	12465	7050	37968
D2 Leisure	6730	3.42	17860	15737	5240	11327
Total	8090	3.79	26245	28202	12290	49295

¹⁰ Note that for monitoring purposes the development at Trinity Leeds provides mainly replacement retail floorspace alongside a small quantity of new floorspace

Total Demand for Employment Land forecasted in the District until the end of the plan

Based on the Leeds Employment Land Review (2010 Update), the following requirements have been identified over the Core Strategy plan period (2012-2028).

- *General employment land (B2 - B8 uses)* - a minimum of 493 hectares is required. Around 350 hectares exist in undeveloped planning permissions and allocations which may be suitable for employment. This leaves a minimum residual requirement of 143 hectares of land to be identified as part of the Site Allocations Plan assessment process.
- *Office floorspace* - a minimum of 706,250sqm is identified and the provision will comprise of new and existing locations. Planning permissions on existing sites amount approximately to 840,000sqm, however, over a third of the existing supply is located outside the City Centre resulting in further floorspace being needed to help prioritise the locating of offices in centres (and especially the City Centre to reflect its role as the regional economic centre). In order to provide flexibility when determining renewals of existing out of centre office applications, 160,000 sqm of office floorspace will be identified in or on the edge of the city and town centres. This will bring the total additional office floorspace required up to 1,000,000 sqm.

Infrastructure to support regeneration and growth

Infrastructure Delivery Plan

The Infrastructure Delivery Plan supports the LDF. The term 'infrastructure' has a very wide meaning and relates to all facilities and services which are necessary for successful communities to function. Infrastructure is essential to support social, economic, and environmental objectives. It includes a very wide range of aspects within transport, such as roads, railways, buses and public transport systems, cycle and pedestrian provision, parking, and less visible measures such as travel cards or real-time information. It also includes education and health facilities, greenspaces, leisure and cultural facilities, and utilities for instance water and electricity.

The Infrastructure Delivery Plan identifies as far as possible the currently planned infrastructure provision in the Leeds Metropolitan District, including the critical infrastructure necessary for the delivery of the Core Strategy over the whole time period. It provides an overarching framework for other service providers' plans and programmes, to bring them into one place and to ensure that all providers are planning for the predicted level and locations of future growth as set out in the Core Strategy.

Accessibility and Transport

In the past monitoring year the Council has welcomed plans for creating a domestic high speed rail network and has supported the Government's initial proposals for the High Speed Rail Phase 2 (HS2) route from Birmingham to Leeds, which were announced in January 2013. The HS2 project has a potential for economic development and for providing new rail capacity to meet future demand for rail travel. Proposals for a new station on the South Bank have the potential to stimulate the renaissance

of this area of the city centre. However, it is also acknowledged that much work remains to finalise the route, design and impacts on local neighbourhoods before a satisfactory scheme is achieved.

In addition a range of significant transport projects and proposals are occurring in Leeds and the headlines from the previous year are:

- New Generation Transport - an application for a Transport and Works Act Order was submitted to Government. This, subject to a public enquiry in Spring 2014, provides the permissions and powers necessary to build and operate the £250 million trolleybus scheme which is one of the biggest transport infrastructure investments outside of London.
- East Leeds Orbital Road - feasibility work has completed and the initial tranche of funding (£350,000) has been approved.
- Leeds Bradford Corridor – the Council is building stronger and more structured collaboration between Leeds and Bradford, to drive economic development along the nine mile corridor between the two city centres, which are the first and third largest economies in Yorkshire and the Humber.
- Leeds Bradford International Airport - initial development of Link Road proposals.
- West Yorkshire Transport Fund - Under the City Deal for Leeds a 10 year £1bn transport fund is being developed for West Yorkshire and York with the primary aim of generating economic growth through enhanced connectivity..
- City Cycle Ambition Grant - Funding of £29 million secured for cross city high quality cycle super highway.

The Local Transport Plan for West Yorkshire is prepared by the Integrated Transport Authority (Metro) in partnership with local authorities. “My Journey” (the Local Transport Plan 3) was published in 2013 and work is progressing on gathering data for a transport baseline. Once established it will be easier for the LDF AMR to make links to the data and assess the degree to which LDF policies are supporting Local Transport Plan ambitions. In the meantime the two main indicators relate to journeys by different mode of transport approaching the City Centre and accessibility.

Journeys by different modes of transport entering the city centre

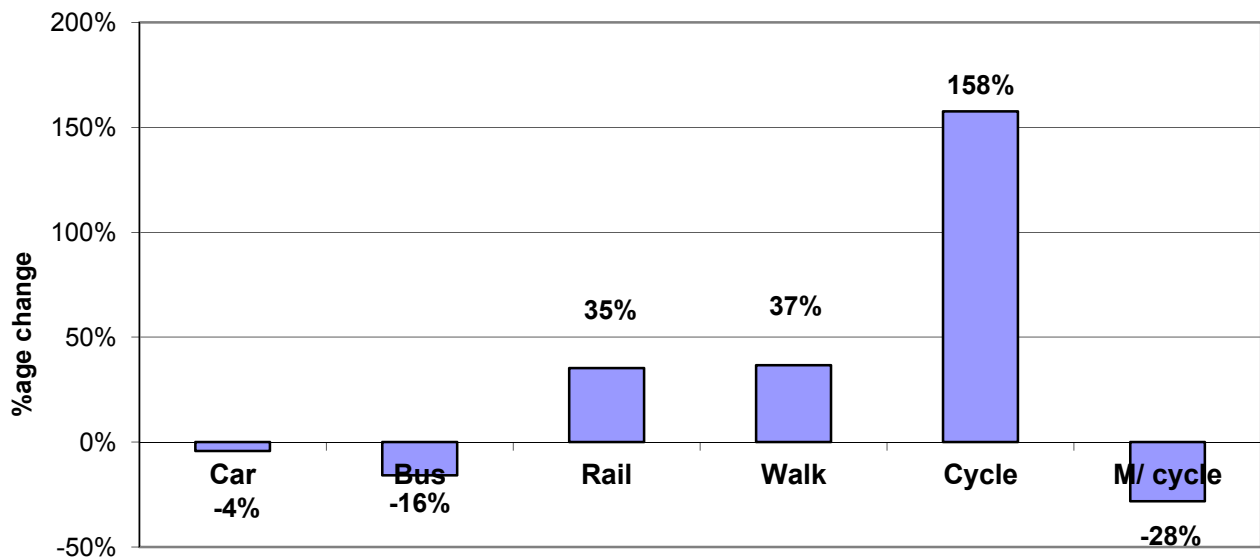
The Leeds mode share data (inbound weekdays 0700-0930) for the past 3 years is set out below. The table shows that whilst nearly 10,000 additional person journeys have been made this past calendar year the proportionate model split remains similar to previous years.

Table 20: Modal share for journeys approaching Leeds city centre (calendar years)						
Mode	Year 2011		Year 2012		Year 2013	
	Baseline - Persons	mode share	Persons	mode share	Persons	mode share
		(%)		(%)		(%)
Rail	18,083	13.8	17,879	13.6	18,530	13.2
Bus	29,868	22.9	27,931	21.3	32,983	23.5

Car	75,801	58.0	77,352	59.0	80,769	57.6
Motorcycle	675	0.5	629	0.5	578	0.4
Cycle	1,442	1.1	1,614	1.2	1,731	1.2
Walk	4,820	3.7	5,748	4.4	5,555	4.0
Total	130,689	100.0	131,153	100.0	140,146	100.0

When looked at over a longer time period it is possible to see more dominant trends. The %age change in volumes between 2004-13 for 0730-0930 (note different time period) is shown in the figure below and reveals that the greatest increase over the past nine years has been in cycling into the city centre followed by walking and rail. It is currently difficult to attribute specific drivers for the change but they will involve a range of factors such as: job growth in the city centre, pressure on different modes, environmental improvements and provision of at work facilities for modes such as cycling. Decreases in car journeys may be symptomatic of the preference of other modes and the reduction in the number of long stay car parks during the week.

Figure 3: Inbound mode share changes (0730-0930) 2004-13



Accessibility of new development

It is possible to calculate the percentage of new residential development within a range of times by scheduled public transport services from a GP, hospital, primary and secondary school, new employment sites and a major health centre. Measuring the length of time taken to reach such services provides an assessment of whether the distribution of new housing is in accessible locations.

The results for 2012/13 show that new gross dwellings completed have a similar accessibility profile for journey times to those completed in 2011/12. Using the 5 year average as a benchmark, figures for journey times within >60 mins, 45 mins and <15 mins are generally marginal with one exception: there

has been a decrease in the 5 year average of new homes accessible to tertiary education largely as a result of a slowdown in city centre housing.

It should be noted that this indicator is only a measure of access and does not address issues such as capacity of facilities to accommodate demand arising from new development.

Table 21: Accessibility of key services to new dwellings 2012/13

Service	Not accessible (>60min)		Medium accessibility (≤45mins)		High accessibility (≤15min)	
	2012/13	5 year average	2012/13	5 year average	2012/13	5 year average
Hospitals	9.3%	9.1%	88.7%	87.7%	31.1%	32.3%
GP surgeries	8.8%	8.9%	91.1%	91.1%	90.7%	88.8%
Primary Schools	8.8%	8.7%	91.2%	91.3%	89.7%	89.4%
Secondary Schools	9.2%	9%	90.8%	90.9%	55.3%	53%
Tertiary Education	9.2%	9%	88%	88%	29.2%	38%

Schools

The Council has secured funding to help create an extra 1,250 school places for Leeds pupils by 2015. However, the impacts of an increased birth rate together with the need to accommodate more housing necessitate closer links between development and schools provision. The Site Allocations Plan, Community Infrastructure Levy and continued S106 provision will all be important in ascertaining the levels of school provision required as a result of new and existing population growth.

Environment

Climate Emissions

The trend of CO2 reductions across the whole of Leeds since 2005, when the first quality data was available. This gives the overall % figure, then breaks this down by the relative contribution of the three main sectors. Note that figures are released with a two year lag.

Table 22: Carbon Dioxide emissions reduction in Leeds District by major emitter

	Absolute % reduction	Absolute tCO2 reduction	Industry	Domestic	Road Transport
2006	0.1	6.6	-1.3	1.2	1.1
2007	2.8	141.4	2.8	4.9	-0.7

2008	4.5		225.0	3.9	5.8	3.5
2009	13.9		697.2	16.1	15.2	7.6
2010	10.4		521.3	12.0	9.0	9.8
2011	18.0		900.6	20.4	19.6	11.3

Emissions from development is a key contributor to CO2 emissions and two of the biggest developments completed this past year performed well in terms of reducing their emissions.

The Trinity Leeds development achieved a BREEAM 'Excellent' rating through a number of initiatives including a process of generating energy through waste and by ensuring the project achieves its goal of sending zero waste to landfill. The First Direct Arena achieved a BREEAM "Very Good" efficient and environmentally friendly, including heating from air source heat pumps, the roof collects rainwater to be reused in the running of the building and an area will have a green sedum roof to help enhance the environment. Improvements to access on Claypit Lane also saw the site connected to the cycling network whilst the construction contractor monitored waste sent to landfill as part of commitment to the WRAP initiative.

The council has run campaigns to improve home energy efficiency and reduce fuel bills, particularly for some of the most vulnerable people in Leeds. Highlights include:

- Wrap Up Leeds, the Council's free insulation scheme, insulated over 10,000 lofts and cavity walls, helping over 8,000 households to save £1.4m pa, reducing CO2 emissions by 5,600t pa and lifting an estimated 500 homes out of fuel poverty. The Council has also installed 137 new boilers in vulnerable private sector homes and has now taken over 3,000 enquiries.
- Wrap Up Leeds+ extended the range of help available and in total will install around 900 main measures including insulating over 400 external walls. This has attracted over £6m of investment to the city.
- The Council has also worked closely with and part-funded Care and Repair to run the Warm Homes Service. This supported 1,861 elderly residents and those with health issues and including installing 219 new heating systems and more importantly carrying out emergency repairs to 1,280 systems during the winter.

Renewable Energy

The context for monitoring renewable energy generation capacity in Leeds is provided by the Council's Natural Resources and Waste Local Plan (2013) in Table 5.1. This Table sets out the estimated installed and potential grid connected renewable energy capacity (MW) for the Leeds district. The target for Leeds is to produce at least 75MW of installed grid-connected renewable energy capacity by 2021, which originated from the now-revoked RSS. The target aims to significantly increase the existing position of 15.51MW of total generated grid-connected renewable energy capacity in Leeds to 75MW by 2021.

Table 23 below identifies the installed grid-connected renewable energy capacity (MW) in the Leeds.

Table 23: Total installed grid-connected Renewable Energy Capacity (MW) in Leeds, as of November 2013		
Location	Type of Installation	MW generated
Skelton Grange*	Landfill gas	6.00
Peckfield Landfill	Landfill gas	4.23
Howden Clough	Landfill gas	1.82
Gamblethorpe Landfill*	Landfill gas	1.00
Morley Greaseworks	Landfill gas	0.46
Buslingthorpe Green	Bio-Diesel Power Plant	2.0
Total grid connected		15.51

*Note that MW generated figures for these facilities have changed from AMR 2012

These sources provide enough energy to power roughly 22,500 properties in Leeds.

The most notable change since the AMR 2012 is the substantial increase in consented capacity from 5.1MW to 62.1 – 64.6 MW. This rise can be attributed to a number of key favourable decisions taken in 2012/2013 on major renewable and low carbon energy-related planning developments. The city is therefore well on course to meet the 75MW target for Leeds.

Table 24: Consented but not yet constructed installed grid-connected Renewable Energy Capacity (MW) in Leeds, as end of 2013		
Location	Capacity (MW)	Known installation date
Knostrop Wind Turbine at Yorkshire Water WWtW, Cross Green	2.00	Mid to End 2014 (implemented)
Gasification Power Plant (Cross Green Heat & Power Ltd) at T. Shea Waste Transfer Station, Cross Green	2.60	Date not known (unlikely to be implemented)
Hook Moor Wind Farm, Micklefield	12.5 - 15.0	Late 2015 (not implemented)
Energy Recovery Facility at Newmarket Approach, Cross Green	10.0	Mid 2017 (not implemented)
Energy Recovery Facility off Skelton Grange Road, Cross Green	26.0	Date not known (not implemented)
Haigh Hall Farm Solar Farm, Tingley	7.50	Early - Mid 2014 (not implemented)
Wothersome Grange Farm Anaerobic Digestion	1.00	Late 2014 (not implemented)
Total consented installed capacity	62.1 – 64.6 MW	
Target 75MW grid connected capacity by 2021		

A number of small domestic wind turbines (with potential for at least 0.135MW) have also been consented in Leeds which could provide an additional grid connected capacity but the installation of these has not yet been monitored as such a task is resource intensive. This work may be included in the AMR 2014.

Table 25 below provides a progress overview of grid-connected renewable energy capacity targets identified in the NRWLP (2013) by technology type.

Table 25: Progress overview of grid-connected renewable energy targets by technology type (MW)				
Renewable and low carbon technology type	NRWLP (2013) 2021 grid connected and installed target by type (MW)	Grid connected and installed in 2013 (MW)	Consented in 2013 (MW)	NRWLP (2013) grid connected and installed 2021 target met
Landfill gas	12.00	15.51	1.00	Exceeded
Wind power	20.00	None	14.5-17.5	Not met
Micro-generation	10.00	Unknown	Unknown	Unknown
Energy from Waste	35.00	0	39.60	Exceeded
Hydro Power	2.00	0.260	0.260	
Energy from Biomass	2.00	0	0	Not met
Other	0	0	7.50 (solar)	Exceeded
Total	81.00	15.77	62.86-65.86	

Heat Mapping

A City Region wide programme of research that aims to identify key priorities for the development of district heat network priorities and to progress the project development of two district heat network priorities. The overall objective of the SHP is to provide a robust evidence base that supports a substantial increase in low carbon energy generated and distributed via district heat networks in the LCR.

Specifically the SHP will:

- Identify a list of investment opportunities for further energy masterplanning / project development;
- Undertake project development to identify whether two know district heat network priorities should be escalated to full technical feasibility and procurement;
- Inform Local Development Frameworks / Local Plans in relation to policies that identify where development should include provision for connection to district heat network priorities; and,
- Develop City Region capacity and expertise to ensure all outputs can be kept up to date and used in a flexible manner.

Greenspace

Part of the Best Council Plan involves ambitions for Leeds to be a child-friendly city and a healthy city. Providing green spaces, which improve quality of life is key to this ambition. The Core Strategy will

help secure over 500 ha of new greenspace provision in association with its delivery of 70,000 new homes.

Considerable areas of new public on-site green space are being created, as can be seen in the recent and pending planning applications at Thorpe Park (Green Park 47 hectares and Central Park a further 10 hectares), Grimes Dyke (linear park 4.4 hectares), the former Clariant Works, Horsforth (3.2 hectares), Cookridge Hospital (1 hectare), New Forest Village, Middleton (10 hectares) and Thorp Arch (10 hectares). All of these sites have afforded an opportunity to deliver new green space of strategic importance to satisfy a diverse range of open space, sport and recreation needs from existing communities and residents of the new developments.

In addition remediation of minerals sites such as St Aidans, Allerton Bywater has delivered the largest wetland in Europe at 328 hectares.

In 2012/13 a total of £1,105,354 was received from S106 contributions towards greenspace improvements and provision. Much of this provides new children's play areas, but some also provides landscaping, tree planting and sports pitch facilities.

Green space sums generated by development and delivered through S106 agreements are only one strand of green space investment in the city. During the last 10 years investment from the Heritage Lottery Fund into Roundhay (£8 million), Kirkstall Abbey (£5.4 million) and Middleton Park (£1.5 million).

Natural Resources and Waste Local Plan

A separate monitoring report will be prepared to monitor progress of the Natural Resources and Waste Local Plan. It will provide a comprehensive position on flood risk, air quality and minerals and waste indicators and it is envisaged that this will be prepared by the Summer 2014.

Appendix 1: Key to AMR indicators

The table below sets out the Local Development Framework Core Strategy Indicators and links to the content within the monitoring report above. In some cases indicators are not monitored in the current report in such cases a reason and further link is provided.

Core Strategy Indicator	AMR Content
1. The percentage of development activity to the South of the river in the City Centre, as compared to North of the River	TBC
2. Vibrancy, character and cultural appeal of the City Centre	
3. Net additional dwellings for the Reporting Year by location within the Settlement Hierarchy	
4. Net Additional Dwellings for the Reporting Year by Housing Market Characteristic Area	
5. New and Converted Housing Units on Previously Developed Land	
6. Five Year Supply of Housing Sites and the Long Term Housing Trajectory	
7. Housing Completion by land type	
8. Density of New Housing Sites	
9. Mix of housing units delivered each year by housing type and number of bedrooms	
10. Gross Affordable Housing Completions	
11. Total number of C2 housing units delivered per annum	
12. Total number of Gypsy and Traveller pitches in the District as compared to the previous year	
13. Total number of Travelling Showpeople pitches in the District as compared to the previous year	
14. % of empty homes in the District (as	

measured through properties classified as long term vacant)	
15. Total amount of additional employment floorspace by type	
16. Total Demand for Employment Land forecasted in the District until the end of the Plan	
17. Employment Land Available by Sector	
18. Net Change of Employment Land in Leeds Loss of employment land to other uses	
19. Retail Land Supply	
20. Total D2 (leisure) development delivered in District (see 1a – Leisure)	
21. % of A1-A5, B1a , C1 and D1-D2 development within and on the edge of town and local centres. Separate A1 food from general A1.	
22. % of A1-A5, development within and on the edge of town and local centres outside town and local centres dividing between units larger and smaller than 372square metres gross. Separate A1 food from general A1	
23. Provision of Infrastructure, as outlined in CIL	
24. Provision of Green Infrastructure and Greenspace, as obtained through development process and other sources	
25. Amount of Greenspace lost to redevelopment	
26. Number of Conservation Area Appraisals completed as a proportion of total Conservation Areas	
27. Number of buildings noted as 'at Risk' on the 'At Risk Registrar'	

28. Number of Listed Buildings demolished	
29. Total development in Regeneration Priority Programme Areas	
30. Performance as measured by the Index of Multiple Deprivation	
31. Delivery of a City Centre Park	
32. Accessibility of new dwellings to local services, employment, health, education and centres	
33. Accessibility of new employment, health, education, leisure and retail	
34. The delivery of transport management priorities	
35. Mode of travel to work	
36. Expansion of the Leeds Core Cycle Network	
37. Quality of existing Sites of Special Scientific Interest in Leeds	
38. Increase in the amount of tree cover in the District	
39. Planning Permissions granted contrary to the Environment Agency's advice on Flood Risk and Water Quality	
40. Delivery of the Leeds Flood Alleviation Scheme	
41. Air Quality in Leeds	
42. Renewable Energy Generation	
43. Production of primary land won aggregates	
44. Capacity of new waste management facilities	
45. Amount of Municipal waste arising, and managed by waste stream	

