

# Updated Note on Employment Land Needs for Greater Manchester

March 2021

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## Introduction

1.1 This note sets out the independent advice of Nicol Economics on the future scale of employment land needs in Greater Manchester (GM) for the Greater Manchester Spatial Strategy (Places for Everyone Plan). It represents an update of the work carried out in 2020 that formed the evidence base for the earlier Greater Manchester Spatial Framework (GMSF) which was based on the 10 districts of GM<sup>1</sup> (“GMELN 2020”). This work led to GMSF 2020 making the following provision for need:

- Policy GMP3: “At least 2,500,000 sqm of accessible new office floorspace will be provided in Greater Manchester over the period 2020-2037”.
- Policy GMP4: “at least 4,100,000 sqm of new, accessible, industrial and warehousing floorspace will be provided in Greater Manchester over the period 2020-2037”.

<sup>1</sup> Note on Employment Land Needs for Greater Manchester, Nicol Economics for the GMCA, February 2020

- 1.2 The note has been updated to address two points:
- 1) First, that the decision has been taken to proceed with a joint plan of nine GM districts (Places for Everyone Plan – PFE 2021), following the decision of Stockport Council in December 2020 to withdraw from the joint plan of the ten GM districts, known as the GMSF. PFE 2021 requires an assessment of need for employment land for the remaining nine districts of GM ie excluding Stockport (the GM-9).
  - 2) Second, as a result of the switch to the PFE, the period covered by the Plan has changed to 2021-2037, from 2020-2037.
- 1.3 As a result of the timing of this update, a further years data on completions across GM is now available (for 2019/20) which has been fed into this updated assessment

### ***Positioning this note and caveats***

- 1.4 The analysis has been produced to inform the PFE assessment of **overall economic needs** for employment land; therefore it is important to note (as also stated in GMELN 2020):
- The analysis is of the future requirements for employment **floorspace**. This needs to be converted into the land requirements for the Plan area based on appropriate densities for different uses.
  - The analysis primarily covers **GM as a whole** (either for the GM-9 or GM-10 area). The completions data used and analysed is available at a district level, therefore the note shows the illustrative implications of applying the method at a district level. The choice of the locations for provision of employment land allocations in the future is not covered by this paper.
  - The analysis considers only requirements for employment land in **B and some new E Use Classes**. The analysis considers needs in quantitative terms for **office** uses in total (new Class E(g) (i) and (ii) Use Classes) and **industrial and warehousing** uses (I&W) in total (Class B2 and B8 and new Class E(g) (iii)). It does not consider demand separately for Class E(g)(ii) (ie R&D) space separately from that of offices, nor does it consider employment land and property needs for other use classes. It does not consider the quality of employment land and floorspace nor the precise location of need.
  - The analysis considers only the demand/need in the future for employment floorspace, it does not consider the **supply position**, which is addressed elsewhere.
  - The analysis now covers primarily the total assessed need for the current proposed PFE plan period **from 2021 to 2037**.
- 1.5 The paper makes best possible use of available data. However, there is always inherent uncertainty in looking forward for an economy as large and complex as GM's especially with the complex impact of Covid-19 on the economy since March 2020.

### ***Approach to assessing employment land needs***

- 1.6 In GMELN 2020 we considered the full range of approaches that could, in principle, be adopted and used two approaches to quantify needs:
- 3) **Past employment land take-up or completions** by Use Class as the basis for forecasting future need.
  - 4) **Forecasts of employment change** as the basis for forecasting future need (coupled with an assessment of replacement demand). This was the primary method ultimately used to inform GMSF 2020.
- 1.7 Both approaches led to broadly similar results for need over the then 17 year GMSF Plan period. The forecast based method produced an assessment of need that was 14% to 17% higher for offices and 4% to 5% for I&W space (see Table 1.1). The assessment in GMELN 2020 was that both approaches had their merits although we stated, *“arguably the use of employment forecasts approach is more consistent with the future-facing approach of the GMSF which is seeking to deliver stronger (and more inclusive) growth in GM”*. However, GMELN 2020 added a note of caution in that the employment forecasting approach *“requires more assumptions and calculations”* and so was *“subject to greater uncertainty (around translating jobs to floorspace needs and estimating replacement demand)”*.
- 1.8 The Accelerated Growth Scenario (AGS) employment forecasts, used in the case of the GMSF 2020, relate to GM as a whole. It is not possible to disaggregate the forecasts to a district level without undertaking significant new modelling which would impact on the delivery of the overall timetable of the PfE Plan. Consequently, it is not possible to establish the separate role of Stockport in generating demand when measured by employment change in sectors that drive demand for employment floorspace.
- 1.9 This note therefore focusses on the **past completions** approach to assess future employment needs for the GM-9. Adopting this approach is not only based on a robust, widely accepted methodology, but it also enables the evidence to be produced in a timely fashion, thus facilitating the preparation of the PfE with minimal delays. Furthermore, as detailed in paragraph 1.7, both this approach and the approach based on employment forecasts led to broadly the same conclusions in GMELN 2020.

**Table 1.1: Greater Manchester (GM-10), PREVIOUS estimates of future floorspace needs produced in 2020 (17 year Plan period 2020-37, 000s sqms)**

<b>FUTURE OFFICE NEED GM-10</b>			
	Past completions based	Forecasts based	Difference of forecast to completions
<i>Net need</i>		1,289	
<i>Replacement need</i>		605	
<b>Total gross need</b>	<b>1,687</b>	<b>1,970</b>	17%
Total annual average	99	116	17%
Total overall including 4 year margin	2,083	2,433	17%
Total overall including 5 year margin	2,183	2,549	17%
<b>Total rounded - 4 year margin</b>	<b>2,100</b>	<b>2,400</b>	14%
<b>Total rounded - 5 year margin</b>	<b>2,200</b>	<b>2,500</b>	14%
<b>FUTURE I&amp;W NEED GM-10</b>			
	Past completions based	Forecasts based	Difference of forecast to completions
<i>Net need</i>		1,267	
<i>Replacement need</i>		1,784	
<b>Total gross need</b>	<b>3,030</b>	<b>3,149</b>	4%
Total annual average	178	185	4%
Total overall including 4 year margin	3,743	3,890	4%
Total overall including 5 year margin	3,921	4,075	4%
<b>Total rounded - 4 year margin</b>	<b>3,700</b>	<b>3,900</b>	5%
<b>Total rounded - 5 year margin</b>	<b>3,900</b>	<b>4,100</b>	5%

Source: GMELN 2020. Note: the 2019 Topic paper figures of assessed need were 2.46 million sqm for offices and 4.22 million sqm for I&W for the then 19 year Plan period

### Data sources uses

- 1.10 The research and analysis in the update is based on past **completions data** provided by each of the 10 GM districts to the GMCA. This data measures the gross take up/ completions of new floorspace as recorded by the planning system. The information is aggregated for all I&W and is not separated out for B2, B8 or previous B1c Use Classes. There is now a run of 16 years' worth of consistent data from 2004/5 through to 2019/20 available across GM. (It is set out in Tables A4 and A5 in Appendix A). The data by district is patchy and variable in how far it assesses net completions so the analysis uses the gross completions data (which is important as it reflects the evidence of demand for new floorspace).

## Overview of the updated assessment

- 1.11 Our summary updated assessment is set out in Table 1.2. This assessment is based on using past completions, with some modest re-weighting, and extrapolating this annual figure forward over the 16 year Plan period (2021 to 2037). It shows the results for the GM-9 and the GM-10.
- 1.12 To these we have added a margin of annual need/supply (4 or 5 years for the 16 year period); these equate to respectively 25% to 31.5% uplifts and would represent the upper end of margins that cover rigidities in supply, flexibility for choice and the inherent uncertainties in forecasting future needs. It would be inappropriate to add a further margin to the supply figure (so long as the assessed supply is all regarded as being deliverable and fit for purpose).

**Table 1.2: Greater Manchester, NEW estimates of future office and I&W floorspace needs - 2021 to 2037 (16 YEAR PERIOD), based on past completions**

000s sqm	OFFICE 2021-37	OFFICE 2021-37	I&W 2021- 37	I&W 2021- 37
	GM-10	GM-9	GM-10	GM-9
Total gross need	1,581	1,453	2,718	2,534
Add margin <b>4 years</b>	395	363	680	634
Total overall	1,976	1,816	3,398	3,168
Total rounded	1,980	<b>1,820</b>	3,400	<b>3,170</b>
Add margin <b>5 years</b>	494	454	850	792
Total overall	2,075	1,907	3,568	3,326
Total rounded	2,070	<b>1,910</b>	3,570	<b>3,330</b>

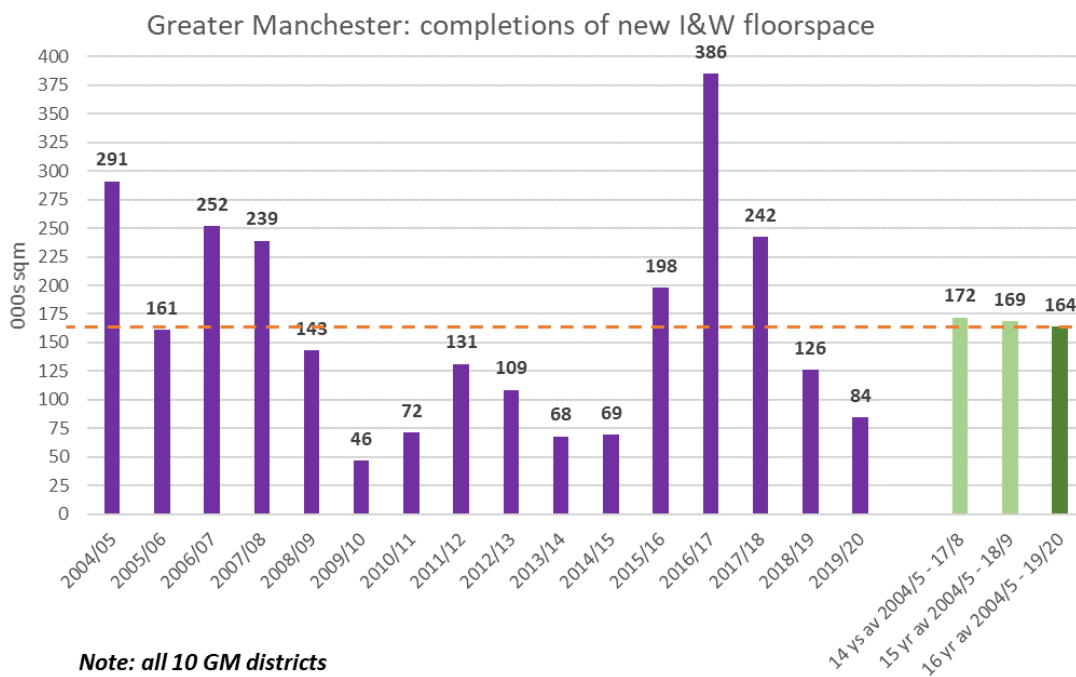
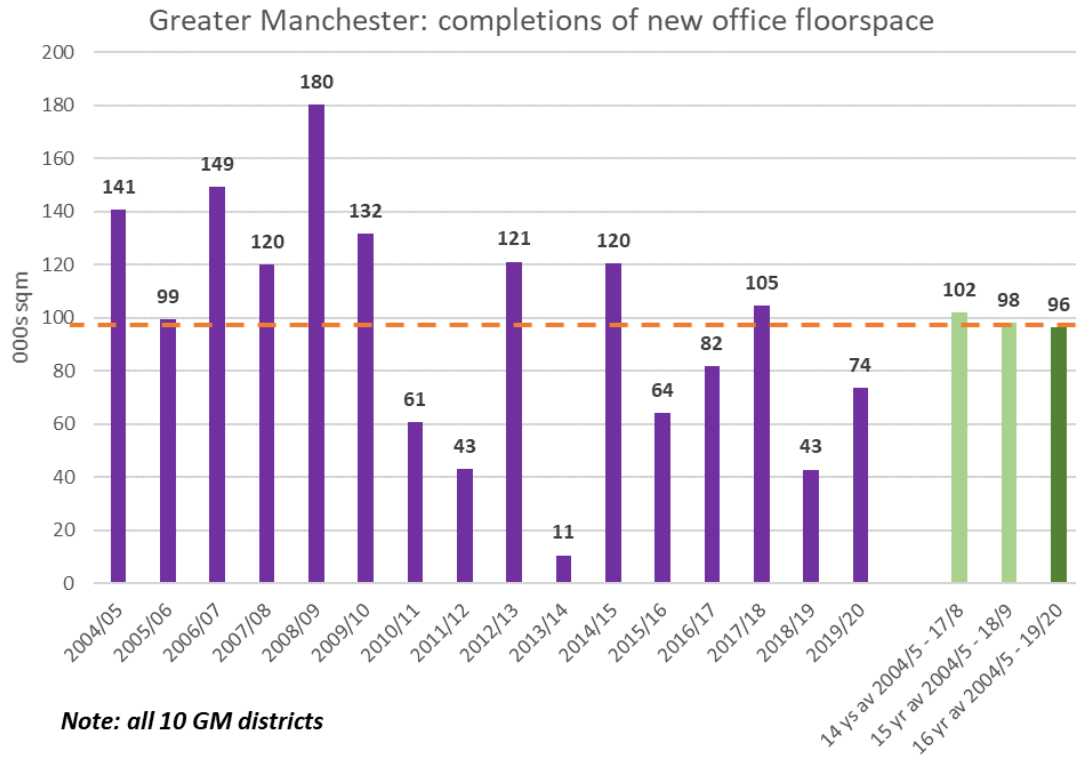
Source: Nicol Economics calculations

## Analysis of past completions data

### Past completions data

- 1.13 The completions data for the period 2004/5 to 2019/20 has been provided by all GM districts which is used in the modelling of demand. The 16 year run of data used shown below in Figure 1.1. The data clearly show the volatility of the completions data, but that broadly they respond to economic cycles. The most recent data as reported are:
- Office: in 2019/20 gross completions for the GM-10 were 74,000 sqm which is **76% of the 16 year average** and so slightly reduces the average of 98,000 for the previous 15 years to 96,500 sqm (by 2%).
  - I&W: in 2019/20 gross completions for the GM-10 were 84,200 sqm which is **51% of the 16 year average** and so slightly reduces the average of 168,900 for the previous 15 years to 163,600 sqm (by 3%).

**Figure 1:1 GM completions data trends, office and I&W 2004/5 to 2019/20**



Source: GMCA and individual district authorities

## Disaggregating the GM-10

- 1.14 The full data on completions by district is set out in Appendix A (Tables A4 and A5). However Table 1.3 summarises the difference between the GM-9 and GM-10. Essentially, over the period for which we have completions data, for **office** floorspace the GM-9 share of the GM-10 total has averaged about 92% to 93%, whilst for **I&W** floorspace the GM-9 share has been slightly higher at 93% to 96%.
- 1.15 To put these figures into context, the GM-9 districts account for 91% of all the office stock in GM and 92% of all the I&W stock<sup>2</sup>. So the rate of development in the GM-9 over the longer period is broadly in proportion to the stock of floorspace in both offices and I&W.

**Table 1.3: Completions data, annual or annual average, 000s sqm**

Sector	Period	GM-10	GM-9	GM-9 as share of GM-10
Office	2019/20	73.6	72.3	98.3%
	Past 5 years	73.4	68.0	92.6%
	Past 10 years	72.3	67.1	92.8%
	Past 16 years	<b>96.5</b>	<b>88.8</b>	<b>92.1%</b>
I&W	2019/20	84.3	80.7	95.8%
	Past 5 years	207.3	198.5	95.7%
	Past 10 years	148.5	137.7	92.7%
	Past 16 years	<b>163.6</b>	<b>152.6</b>	<b>93.3%</b>

Source: Nicol Economics analysis of data provided by the GMCA

## Updating the approach – weighting factor?

- 1.16 The rationale for this step was described in the January 2019 Topic Paper as reflecting “consideration of the appropriateness of the historic time period has been made due to past trends incorporating a once in a generation UK recession and a weighting applied to account for atypical years”. As noted in GMELN 2020:
- First, strength of the rationale for using any special weighting diminishes the longer the time period covered - as the extent to which any one single year or group of years impacts on the overall average gets smaller over time. Although, it is still undoubtably the case that the 2008 to 2012 recession was, in many respects, unprecedented.
  - Second, to some degree every form of weighting is a bit arbitrary (as of course is applying no explicit weighting as this implicitly gives each year’s data the same weight).

<sup>2</sup> According to Valuation Office Agency data, as of the end of March 2020 Stockport had a recorded stock of 442,000 sqm of office floorspace or 9.4% of the 4,705,000 GM-10 total; whilst for I&W space its stock was 1,489,000 sqm or 7.8% of the total GM-10 stock of 19,145,000 sqm

- 1.17 We have run the re-weighting exercise from 2020. The weightings used are set out in Figure A1 in Appendix A. They are very similar to those used in the GMELN 2020, apart from the fact that there is an extra year so therefore all the weightings have needed to be adjusted.
- 1.18 The results are set out in Table 1.4 below. As can be seen, applying each set of weightings has different impacts on office and I&W due to the pattern of timing of completions. The application of these new weightings leads to an overall weighted I&W figure which is slightly lower than that in the GMELN 2020; however for offices the overall weighted figure is slightly higher than that used previously. The impact of the weighting exercise is almost identical between the GM-10 and GM-9 districts.

**Table 1.4: Impact of weighting factors**

Area	GM-10	GM-10	GM-9	GM-9
Weighting used	Comparison to unweighted %	Annual av. 000s sqm	Comparison to unweighted %	Annual av. 000s sqm
	<b>Office</b>	<b>Office</b>	<b>Office</b>	<b>Office</b>
New baseline average (unweighted)*	100.0%	96.5	100.0%	88.8
Weighting <b>recent</b> data	86.0%	83.0	86.8%	77.1
Weighting <b>past</b> data	116.0%	112.0	115.8%	102.9
Take out impact of <b>recession</b>	105.2%	101.5	104.0%	92.4
Average of recent and past only	101.0%	97.5	101.3%	90.0
Average of all forms of weighting	<b>102.4%</b>	<b>98.8</b>	<b>102.2%</b>	<b>90.8</b>
Weighted figure GMELN 2020	101.2%			
	<b>I&amp;W</b>	<b>I&amp;W</b>	<b>I&amp;W</b>	<b>I&amp;W</b>
New baseline average (unweighted)*	100.0%	163.6	100.0%	152.6
Weighting <b>recent</b> data	92.8%	151.9	93.2%	142.2
Weighting <b>past</b> data	105.1%	172.0	104.4%	159.4
Take out impact of <b>recession</b>	113.6%	186.0	113.7%	173.5
Average of recent and past only	99.0%	161.9	98.8%	150.8
Average of all forms of weighting	<b>103.9%</b>	<b>169.9</b>	<b>103.8%</b>	<b>158.4</b>
Weighted figure GMELN 2020	105.4%			

Notes: \* based on 16 year average 2004/5 to 2019/20



## Overall assessment including a margin allowance

### *Appropriate use of a margin*

- 1.19 As explained in GMELN 2020, the norm in all employment land reviews is to add some further uplift factor often called a “**buffer**”, “**margin of choice**” or “**safety margin**”. These buffers tend to be expressed either as a % or more normally as a number of years supply. Typical figures are 10% to 20% or 2 to 5 years’ worth of annual need (for a 20-year Plan period).
- 1.20 The need for such a margin is often described as providing for some flexibility to allow for:
- Potential margin of error associated with any forecasting process for future need
  - Choice of sites to facilitate competition in the property market
  - Some level of vacant floor space within functioning markets
  - Flexibility to allow for any delays in individual sites coming forward.
- 1.21 There is no consistency across employment land studies as to how large the margin should be<sup>3</sup>. The minimum generally used is two years of need (or looked another way the annual supply required to meet the assessed need) but many studies include five years of supply. In percentage terms these margins of course depend on the period for which provision is being made, the longer the plan period the greater the number of years of margin that would be appropriate. Table 1.5 shows a four year would equate to an effective 24% uplift and a five year margin a 29% uplift for a 17 year period and 25% and 31% respectively for a 16 year plan period.

**Table 1.5: Margins expressed in different ways**

Plan Period	2020-37	2021-37
Number of years of plan	<b>17</b>	<b>16</b>
Margin in years of supply/need	Margin as a %	Margin as a %
2	12%	13%
3	18%	19%
4	24%	25%
5	29%	31%

- 1.22 In GMELN 2020 the conclusion was that across both demand and supply an overall margin of around 25% was justifiable (over 4 years’ worth of supply over a 16 or 17 year plan period). This could be thought of as two years’ worth of supply as a minimum to reflect rigidities in the delivery of supply, plus two to three years to reflect the uncertainty over the forecasting of need.

<sup>3</sup> Different research and consultancy firms adopt different approaches and these may also vary across time

- 1.23 The work in 2020 also noted the uncertainties in all forecasting methods. In particular in noted that “for the past completions approach a key issue is that the rate of economic growth (jobs and especially GVA) for some sectors contributing to employment need is forecast to be stronger than in the past – this is especially true for manufacturing. Therefore this approach may understate future need without a further margin”.
- 1.24 Overall the analysis in GMELN 2020 concluded there was a **finely balanced argument** as to whether a 4 or a 5 year margin was more appropriate and so show both. **This judgement is still the same for the proposed 16 year Plan period** especially given that we are now relying on the past completions approach with its inherent backward looking focus for the GMSF for the GM-9.

### ***Final overall assessment***

- 1.25 The final result of the assessment are set out in Table 1.6 below. For the GM-9 the range of figures for **offices** is 1.8 to 1.9 million sqm for the 16 year Plan period (compared to the 2.4 to 2.5 million sqm assessed in GMELN 2020 for the then 17 year Plan period and the GM-10 based on employment forecasts<sup>4</sup>).
- 1.26 For the GM-9 for **I&W space** the assessment produces a range of 3.2 to 3.3 million sqm of space needed for the 16 year Plan period (compared to the 3.9 to 4.1 million sqm assessed in GMELN 2020 for the then 17 year Plan period and the GM-10 based on employment forecasts<sup>5</sup>).
- 1.27 The figures for both office and I&W are lower than as assessed in GMELN 2020 as would be expected due to:
- 1) Covering need for 9 rather than 10 districts
  - 2) Covering 16 rather than 17 years (applying the updated data and approach to the 17 year period is shown in Table A1 in Appendix A).
  - 3) The use of past completions approach which generated slightly lower forecasts of need in 2020 than the use of employment forecasts.
- 1.28 In addition, in both cases the inclusion of data for 2019/20 has the effect of slightly reducing the long term rate of completions for the GM-9 (and GM-10).

<sup>4</sup> And 2.1 to 2.2 million sqm based on past completions for the GM-10

<sup>5</sup> And 3.7 to 3.9 million sqm based on past completions for the GM-10

**Table 1.6: Greater Manchester, estimates of future office and I&W floorspace needs based on past completions 000s sqm - 2021 to 2037 (16 YEAR PERIOD)**

	<b>OFFICE</b>	<b>OFFICE</b>	<b>I&amp;W</b>	<b>I&amp;W</b>
Area covered	GM-10	GM-9	GM-10	GM-9
Total annual average	98.8	90.8	169.9	158.4
Total gross need	1,581	1,453	2,718	2,534
Add margin 4 years	395	363	680	634
Total overall	1,976	1,816	3,398	3,168
Total rounded	<b>1,980</b>	<b>1,820</b>	<b>3,400</b>	<b>3,170</b>
Total annual average inc. margin	124	114	212	198
Add margin 5 years	494	454	850	792
Total overall	2,075	1,907	3,568	3,326
Total rounded	<b>2,070</b>	<b>1,910</b>	<b>3,570</b>	<b>3,330</b>
Total annual average inc. margin	130	119	223	208

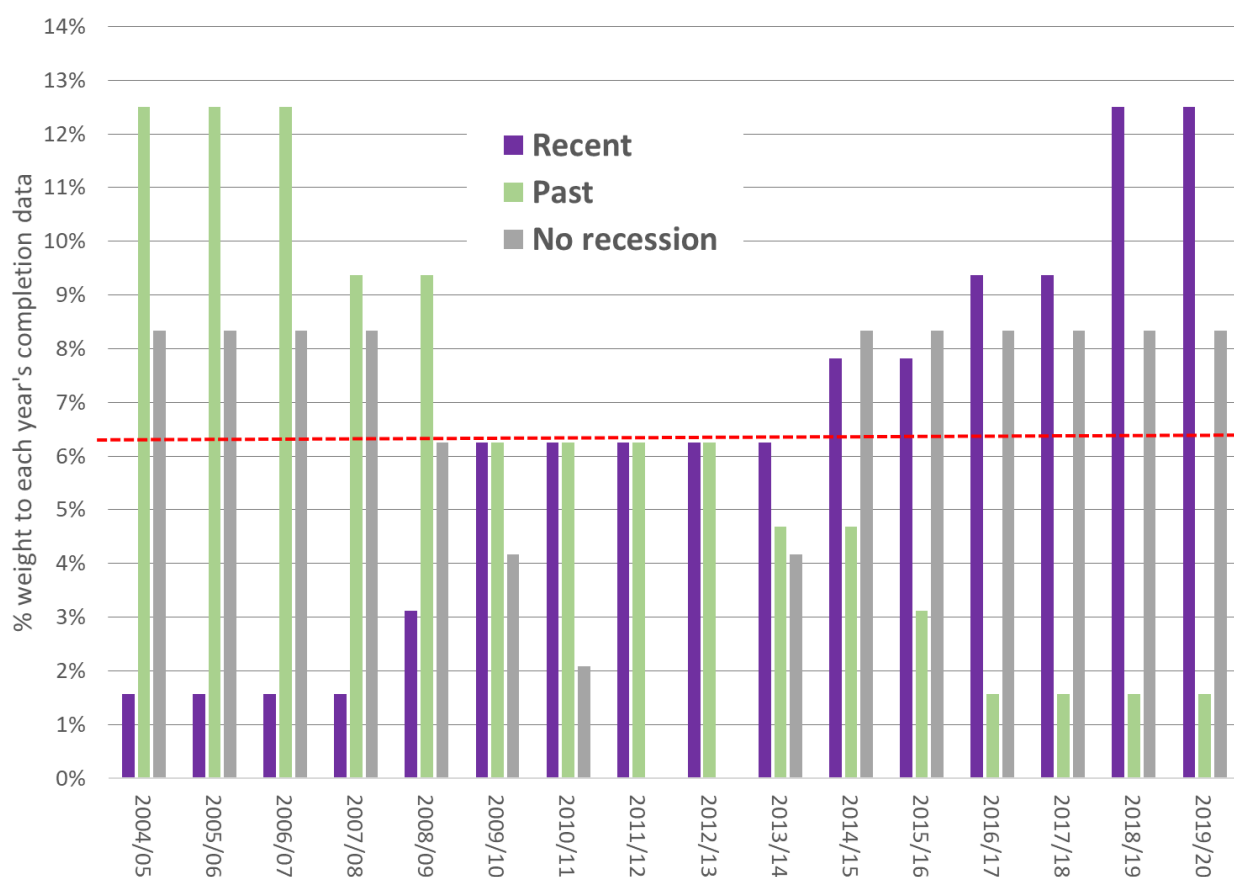
Source: Nicol Economics calculations

- 1.29 The methodology, if it were applied to individual district data, is shown in Tables A2 and A3 below for offices and I&W respectively. However, these are for illustrative purposes only as the assessment of need is much more bust at a wider GM level (GM-9 or GM-10).

**Nicol Economics, March 2021**

## Appendix A : Key Data Tables

Figure A1: Weighting factors 2004/5 to 2019/20



Note: the red dashed line is the equal yearly weighting line

Table A1: Greater Manchester, estimates of future office and I&W floorspace needs - 2020 to 2037 (17 YEAR PERIOD)

000s sqm	OFFICE	OFFICE	I&W	I&W
	2020-37	2020-37	2020-37	2020-37
	GM-10	GM-9	GM-10	GM-9
Total annual average	98.8	90.8	169.9	158.4
Total gross need	1,680	1,544	2,888	2,693
Add margin 4 years	395	363	680	634
Total overall	2,075	1,907	3,568	3,326
Total rounded	<b>2,070</b>	<b>1,910</b>	<b>3,570</b>	<b>3,330</b>
Total annual average inc. margin	122	112	210	196
Add margin 5 years	494	454	850	792
Total overall	2,174	1,998	3,738	3,485
Total rounded	<b>2,170</b>	<b>2,000</b>	<b>3,740</b>	<b>3,480</b>
Total annual average inc. margin	128	118	220	205

Source: Nicol Economics calculations

**Table A2: Greater Manchester districts, illustrative estimates of future OFFICE floorspace needs based on past completions - 2021 to 2037 (16 YEAR PERIOD)**

000s sqm	Annual average*	Total gross need	4 year margin	Total inc. 4 year margin	5 year margin	Total inc. 5 year margin
Bolton	8.1	130	33	163	41	171
Bury	3.0	48	12	60	15	63
Manchester	42.4	679	170	849	212	891
Oldham	3.6	58	15	73	18	76
Rochdale	2.7	43	11	54	14	57
Salford	16.0	256	64	320	80	336
Stockport	7.8	125	31	156	39	164
Tameside	2.9	46	12	58	15	61
Trafford	7.7	123	31	154	38	162
Wigan	4.3	69	17	87	22	91
<b>Total GM-10</b>	<b>98.6</b>	<b>1,578</b>	<b>394</b>	<b>1,972</b>	<b>493</b>	<b>2,071</b>
<b>Total GM-9</b>	<b>90.8</b>	<b>1,453</b>	<b>363</b>	<b>1,816</b>	<b>454</b>	<b>1,907</b>

Notes: \* the figure is the weighted figure using the average weighting for all the GM-9; figures are unrounded

**Table A3: Greater Manchester districts, illustrative estimates of future I&W floorspace needs based on past completions - 2021 to 2037 (16 YEAR PERIOD)**

000s sqm	Annual average*	Total gross need	4 year margin	Total inc. 4 year margin	5 year margin	Total inc. 5 year margin
Bolton	26.7	427	107	533	133	560
Bury	7.7	124	31	155	39	163
Manchester	17.6	282	71	353	88	370
Oldham	10.1	162	40	202	51	213
Rochdale	30.3	486	121	607	152	637
Salford	11.9	191	48	239	60	251
Stockport	11.4	183	46	229	57	240
Tameside	10.2	164	41	205	51	215
Trafford	26.6	426	106	532	133	559
Wigan	17.1	273	68	342	85	359
<b>Total GM-10</b>	<b>169.8</b>	<b>2,718</b>	<b>679</b>	<b>3,397</b>	<b>849</b>	<b>3,567</b>
<b>Total GM-9</b>	<b>158.4</b>	<b>2,534</b>	<b>634</b>	<b>3,168</b>	<b>792</b>	<b>3,326</b>

Notes: \* the figure is the weighted figure using the average weighting for all the GM-9; figures are unrounded

Updated Note on Employment Land needs in Greater Manchester

**Table A4: Office Completions Data across GM, 000s sqm**

Period	04/ 05	05/ 06	06/ 07	07/ 08	08/ 09	09/ 10	10/ 11	11/ 12	12/ 13	13/ 14	14/ 15	15/ 16	16/ 17	17/ 18	18/ 19	19/ 20	14 ys 04/5- 17/8	15 yr 04/5- 18/9	16 yr 04/5 - 19/2 0
Bolton	13.6	30.1	27.7	11.7	13.7	3.4	2.1	0.9	3.2	1.4	0.5	0.7	15.9	0.7	1.2	0.5	9.0	8.5	8.0
Bury	2.3	2.3	6.3	1.7	0.6	11.6	5.2	0.6	0.4	1.1	1.2	1.6	0.6	4.8	1.8	4.4	2.9	2.8	2.9
Man- chester	44.6	27.1	56.1	38.8	104.8	40.7	5.5	21.3	80.5	1.3	57.3	18.0	30.9	59.7	22.8	54.9	41.9	40.6	41.5
Oldham	9.6	10.0	4.4	6.8	6.0	2.5	0.1	0.1	1.5	1.0	6.4	0.3	1.0	2.4	0.1	4.6	3.7	3.5	3.6
Rochdale	4.9	3.0	2.5	1.3	0.1	1.1	3.6	3.7	15.4	0.0	0.0	0.5	3.1	0.0	0.9	2.3	2.8	2.7	2.6
Salford	29.1	4.6	4.9	26.1	6.4	54.5	37.6	4.8	3.7	0.5	23.8	13.4	21.0	17.6	0.7	1.5	17.7	16.6	15.6
Stock- port	8.1	8.1	13.0	24.5	9.9	6.9	5.7	0.1	1.6	3.4	14.1	5.2	3.0	15.8	1.9	1.3	8.5	8.1	7.7
Tame- side	0.0	4.2	5.8	0.3	10.4	6.6	0.0	0.0	0.3	0.4	1.8	4.7	1.5	1.8	6.6	0.9	2.7	3.0	2.8
Trafford	21.5	5.5	15.3	6.3	5.3	3.4	0.3	4.4	11.6	0.3	15.2	18.7	4.7	1.4	5.3	1.2	8.1	8.0	7.5
Wigan	7.1	4.3	13.0	2.6	23.0	1.1	0.5	7.1	2.9	1.2	0.0	0.8	0.1	0.4	1.5	2.2	4.6	4.4	4.2
<b>Total GM-10</b>	141	99	149	120	180	132	61	43	121	11	120	64	82	105	43	74	102	98	97
<i>2019/20 as %</i>																	72%	75%	76%
<b>Total GM-9</b>	133	91	136	96	170	125	55	43	120	7	106	59	79	89	41	72	93	90	89
<i>2019/20 as %</i>																	77%	80%	81%

Source: GM Districts via GMCA. Note: the recorded completions are gross completions and do not take into account the change of use of office to other uses

Updated Note on Employment Land needs in Greater Manchester

**Table A5: I&W Completions Data across GM, 000s sqm 000s sqm**

	2004 /05	2005 /06	2006 /07	2007 /08	2008 /09	2009 /10	2010 /11	2011 /12	2012 /13	2013 /14	2014 /15	2015 /16	2016 /17	2017 /18	2018 /19	2019 /20	14 ys 04/5- 17/8	15 yr 04/5- 18/9	16 yr 04/5- 19/2 0	
Bolton	15.6	12.7	28.4	3.0	6.6	4.3	2.8	3.8	3.5	5.3	2.1	58.5	95.8	98.0	58.5	11.9	24.3	26.6	25.7	
Bury	35.7	2.0	1.4	16.9	0.0	0.0	0.5	0.1	0.3	4.0	13.5	3.7	2.0	17.8	2.4	19.0	7.0	6.7	7.5	
Man- chester	19.0	33.8	31.9	20.6	18.7	13.6	1.1	0.0	3.2	2.7	4.8	40.0	56.0	8.1	12.1	6.1	18.1	17.7	17.0	
Oldham	29.9	18.2	9.6	20.9	24.0	1.8	9.9	1.4	10.2	0.7	1.0	2.1	2.5	11.0	6.3	6.7	10.2	10.0	9.8	
Rochdale	11.0	24.6	21.0	57.0	5.7	5.6	0.0	78.4	67.3	24.3	0.0	7.8	81.3	58.6	2.3	22.9	31.6	29.7	29.2	
Salford	12.2	7.5	38.1	24.4	6.7	10.3	1.0	2.0	1.0	5.9	2.8	35.8	1.9	12.5	21.7	0.6	11.6	12.2	11.5	
Stock- port	17.1	17.5	21.7	8.7	2.7	0.4	28.7	3.4	0.4	1.7	30.1	15.5	8.9	13.6	2.5	3.6	12.2	11.5	11.0	
Tame- side	35.6	8.2	17.9	20.1	18.6	0.0	9.2	10.4	2.2	6.8	7.6	1.5	3.5	7.7	5.7	3.0	10.6	10.3	9.9	
Trafford	102. 9	14.6	61.5	52.2	44.4	0.0	8.0	25.4	0.2	0.0	0.4	26.3	47.8	12.3	10.0	4.1	28.3	27.1	25.6	
Wigan	12.3	22.3	20.3	15.4	15.5	10.6	10.6	6.5	20.1	16.6	6.7	6.9	85.8	2.7	4.6	6.5	18.0	17.1	16.5	
<b>Total</b>	<b>291</b>	<b>162</b>	<b>252</b>	<b>239</b>	<b>143</b>	<b>47</b>	<b>72</b>	<b>132</b>	<b>109</b>	<b>68</b>	<b>69</b>	<b>198</b>	<b>386</b>	<b>24</b>	<b>126</b>	<b>84</b>	<b>172</b>	<b>169</b>	<b>164</b>	
<i>GM-10 2019/20 as % age</i>																		49%	50%	51%
<b>Total</b>	<b>274</b>	<b>144</b>	<b>230</b>	<b>231</b>	<b>140</b>	<b>46</b>	<b>43</b>	<b>128</b>	<b>108</b>	<b>66</b>	<b>39</b>	<b>183</b>	<b>377</b>	<b>229</b>	<b>124</b>	<b>81</b>	<b>160</b>	<b>157</b>	<b>152</b>	
<i>GM-9 2019/20 as %</i>																		50%	51%	53%

Source: GM Districts via GMCA. Note: the recorded completions are gross completions and do not take into account the change of use of office to other uses