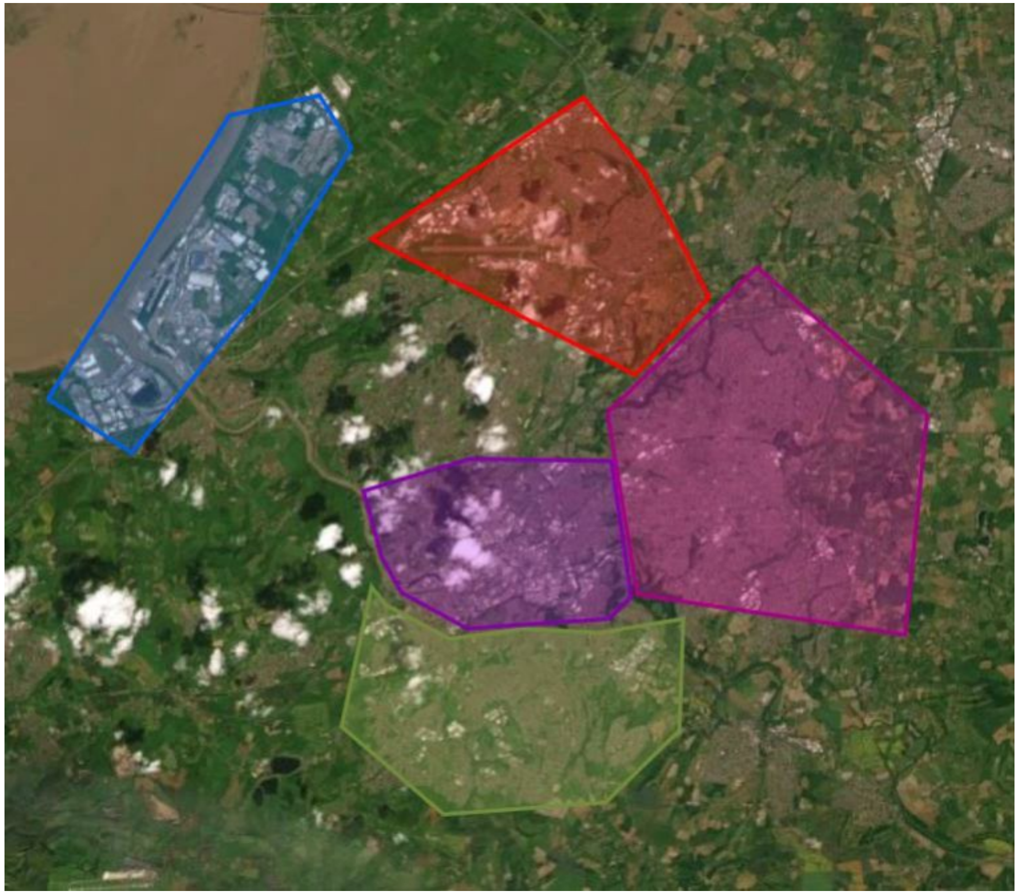
Industrial sector demand

Within the industrial/warehousing sector, market demand is predominantly focused on smaller units below 1,858 m^2/20,000ft^2, a trend that is expected to continue in the future. Similar to the office sector, the industrial market is characterised by leasehold deals. Whilst there is demand for freehold accommodation, it is currently constrained by insufficient supply.

The Avonmouth/Severnside area has experienced the highest amount of take-up in recent years, with some very large distribution and warehouse facilities built for Amazon, Lidl, and The Range. The area is likely to continue attracting industrial occupiers, as long as there is infrastructure provision and a sufficiently deep labour pool.

The urban industrial market in the central areas of St Philip's Marsh and Lawrence Hill (purple on the map overleaf) have experienced the second-highest level of take-up. The majority of occupiers fall in use class B1c and B8. Demand for industrial space is likely to remain high in the future, particularly from occupiers who due to their workforce or operational needs, for example last-mile logistics, require to be in the area. In St Philip's Marsh, the occupiers are mixed, but units tend to be smaller scale (less than 4,645m^2/50,000ft^2). There have been no new schemes delivering industrial land in the area in recent years.

In the south of Bristol (for example Brislington, Ashton, and Hengrove) cater to a mix of businesses, offering proximity to staff and customers. The rise in last-mile logistics is highly likely to create further demand for warehousing space in these areas, as they lie in close proximity to online customers.



Key
- Avonmouth
- North Bristol
- Central Bristol
- South Bristol
- East Bristol

Figure 199 Core industrial sub-markets in Bristol © JLL

Supply of employment land – the jobs we need

Office sector supply

There is approximately 158,000m²/1,700,000ft² net office space in the pipeline. This is based on approximately 36,200m²/ 3,900,000ft² of gross gains (of which less than 2% have been completed) and gross losses of circa 20,400m/ 2,200,000 sqft (of which 45% of this has been completed). This highlights the current market dynamics, specifically the pressure from alternative uses reducing office supply, which is not being replaced as quickly. The majority of new office accommodation is being delivered in the Temple Quarter Enterprise Zone.

From an office perspective the average availability in the city centre is circa 55,740 sqm/ 600,000 sqft, approximately one year of take-up. It is one of the lowest in comparison to the other Big 6 Cities. No substantial new office floorspace has been delivered in the city centre in recent years. However, two exciting schemes are currently on site due for completion in 2020: the Distillery in Glassfields (100,000ft²) and the Assembly in Temple Quay (200,000ft²), both a short walk away from Temple Meads.

However, there is delivery risk due to market pressures from competing land uses, including student and residential accommodation (owner-occupiers, private-rented sector, and build-to-rent).

Industrial sector supply

In the industrial and warehousing market, the existing supply is estimated to be circa 249,000m²/ 2,680,000 ft², which falls slightly below the average annual take-up. There is new built space in Avonmouth and the north-east Bristol fringe, which includes Horizon 38 and Access 18.

In addition to these schemes, there is approximately 86,400m²/ 930,000ft² of net industrial space (use classes B1b, B1c, B2 and B8) in the pipeline. The vast majority of this space is to be delivered at Avonmouth with a lesser amount in South Bristol. All other markets are anticipated to experience a loss of space due to pressure from alternative higher value uses.

Schemes are under construction at Cabot Park (65,000ft²) and Access 18 (950,000ft²) in Avonmouth. Further schemes are being delivered in South Gloucestershire at Warmley, Emersons Green, and at Severnside – outside the Bristol city boundaries.

The delivery of these schemes will provide much needed space, but a large proportion of the new supply will be in a single location—Avonmouth/Severnside—despite continued activity in other more central locations.

Intensification of industrial and warehousing floorspace delivery could be encouraged. This could provide equivalent floorspace to that lost to development for other uses, for example housing and offices.

St Philip's Marsh

St Philip's Marsh is one of the principal industrial and warehousing areas (PIWA) in Central Bristol, covering approximately 63ha. The current PIWA covers 33% of the current quantum of industrial land in Central Bristol.

As highlighted above, it currently plays a very important commercial role in the central Bristol industrial market. The majority of units are well let and in relatively good condition. It is likely that demand from industrial occupiers will continue into the future – particularly those whose customer base is located in the city centre, for example food distributors or last mile logistics operators.

Nonetheless, with the increasing development interest in the area and its central location, St Philip's Marsh could increasingly suit redevelopment to alternative uses, including higher density employment and various forms of residential, particularly in those parts located in relative proximity to the railway station and the University Campus. To accommodate this development Bristol City Council would need to consider amending planning policy and effectively decanting current industrial space, which will pose a challenge as supply is limited and there is already excess demand.

Supply forecasts

Hardisty Jones provides the following modelling estimate for the net additional (new space minus space lost to other uses) floorspace requirements of different sectors, depending on the economic growth in Bristol (Hardisty Jones, 2018).

Economic growth scenario	Office		Industrial/warehouse	
	Net additional	Replacement	Net additional	Replacement
Medium-high scenario (82,500 new jobs)	207,000m^2 / 2,230,000ft^2	225,000 – 450,000m^2	117,000m^2 / 1,260,000ft^2	225,000 – 450,000m^2
High scenario (100,000 new jobs)	250,000m^2 / 2,691,000ft^2	494,000 – 988,000m^2	189,100m^2 / 2,035,000ft^2	494,000 – 988,000m^2

(Note that 'Replacement' means where existing use is demolished and replaced with new development. Based on a replacement rate 1-2% of the existing commercial stock per annum).

If instead pipeline planning permission estimates are used to determine what the net additional supply should be, the following figures are obtained:

Office	Industrial/warehouse	Mixed B Use class land
357,000m^2 / 3,840,000ft^2	88.6ha / 886,000m^2	5.8ha / 58,000m^2

(Note that the pipeline estimates are based on information provided by the Bristol City Council to Hardisty Jones. It includes completions since 2016, planning permissions that have been approved prior to March 2018, as well as allocated development opportunities.)

Adopting the pipeline supply as the commercial requirement for the city is unlikely to encourage continued economic growth and falls below the total amount required to deliver the net additional and replacement floorspace required. There would be continued supply shortages, with intensifying planning-permission competition from other land uses, putting further pressure on businesses.

Recommendations – city-wide strategic considerations

In order to achieve the Bristol City Council's overarching ambition of delivering 'inclusive and sustainable economic growth', the Study recommends that the Council adopt the following high-level measures:

For the office sector:

	Measure	Rationale
1	Pro-actively encourage supply over the Plan Period	Bristol's office market supports a range of sectors. A substantial amount of housing growth is proposed for the city, which could put at risk the supply of adequate office space and in turn restrict the Council's ability to achieve sustainable and inclusive economic growth.
2	Pro-actively encourage Supply in the City Centre and St Philip's Marsh	The vast majority of office activity is focused in the city centre due to increasing occupier demand for accessible, well-connected locations close to amenities for staff. In the city centre there is a significant demand from other competing uses, such as student accommodation and housing.
3	Pro-actively encourage Supply in Secondary Markets	Accessibility is a key consideration for office occupiers. Improvements in transport connectivity in particular proximity to a train station with an appropriate frequency of service could make secondary locations more attractive to office occupiers in future. A small number of the proposed growth and regeneration areas are located in accessible locations such as Frome Gateway, Bedminster and Lawrence Hill.
4	Protect Supply of Existing A Grade Space	Bristol currently has 100,000ft^2 of Grade A office space available. This falls below the average annual take-up of circa 138,000 sqft. This restricts the ability for the city to attract new businesses or support exist business expansion.
5	Protect the Supply of existing secondary space	The secondary market in Bristol provides important lower cost accommodation for a range of businesses, in particular SMEs. However, existing supply equates to approximately one years average annual take up. This restricts the ability to attract new businesses to the city and for existing companies to expand. Affordable accommodation is essential to a number of growth sectors. The council should consider using Article 4 direction to resist the loss of office space to residential and review their property portfolio to identify suitable opportunities to negotiate lease extensions with existing long leaseholders to encourage investment in upgrading office stock.

For the industrial sector:

	Measure	Rationale
1	Pro-actively encourage the supply of Industrial Space	The industrial/warehouse market in Bristol is active with good levels of demand, which is anticipated to continue into the future. However, a substantial amount of housing growth is proposed for the city which could constrain supply and restrict the Council's ability to achieve sustainable and inclusive economic growth.
2	Protect and enhance urban Industrial Sites	The existing central urban markets make an important contribution to the local economy. These areas support businesses who are unable to relocate to Avonmouth/Severnside due to workforce or operational requirements. There is increasing pressure that these areas are redeveloped to provide alternative uses, particularly housing. This could compromise the ability to achieve sustainable economic growth.

	Measure	Rationale
3	Pro-actively encourage the expansion of Industrial/Warehousing markets outside of Avonmouth/Severnside	Encourage the expansion of the more urban industrial markets to reflect the increasing occupier demand, for example from last mile logistics firms. These markets include south, central, north and east parts of the city. This is particularly important given the policy proposed in the emerging Local Plan Review.
4	Protect and Expand Avonmouth/ Severnside	Seek to support the ongoing expansion of Avonmouth as a strategic distribution hub for the south west.

Recommendations – St Philip's Marsh

The Study makes the following recommendations with regards to St Philip's Marsh, which have been taken into account by Bristol City Council.

Topic	Public sector action
Uses	Retain part of the site as protected industrial/warehousing area, for example the land east of Albert Crescent. Encourage the delivery of higher density employment such as offices/workshop space in the area to be redeveloped.
Masterplan	Identify zones for commercial development that could guide future development and encourage delivery. Identify phasing having regard to landowner/ occupier plans. This could minimise the impact on the commercial market as there would be a more structured approach to delivery – as opposed to sites coming forward on an ad-hoc basis. This would also help minimise the impact of bad neighbour uses, for example waste.
Landownership	Consider acquisition of sites that would increase the Council’s control over delivery. Ensure an appropriate level/type of commercial space (offices or industrial) is delivered on land within the Council’s ownership. Work with other public sector bodies to encourage delivery of appropriate commercial space on their land.
Delivery	Take a more proactive role in delivering different forms of industrial, for example multi-height warehouses or light industrial with residential above. This could increase market confidence to encourage private sector delivery. It could assist in protecting the industrial market in the central area. Take a proactive role in delivering a first phase of office or flexible accommodation, particularly in the shorter term. Consider delivering uses on underused plots, for example Arena Island, whilst development proposals are being progressed. This would help establish the market in certain parts of St Philip's Marsh.

Retail (2020)

Figure 200 Retail contextual data

Retail

Bristol Temple Quarter & St Philip's Marsh: current market

A summary of the current retail market is summarised in the adjacent Figure 20008 and Figure 20109.

This study has considered an 800m radius (approximately 10 minute walk time) to ensure that, in addition to those who live within the BTQ and St Philip's Marsh area, those that do not but are within a close enough distance to easily use the retail and services, are captured. The radius extends into the centre of Bristol City Centre in the north, encompassing the main shopping areas of Broadmead and Cabot Circus. It extends to Avon Meads Retail Park in the east, encompassing Arnos Vale in the south and the neighbourhoods of Totterdown and Bedminster Trading Estate in the west. The catchment area currently contains a resident population of 26,000.

Additional revenue streams also come from rail passengers. Currently 11m passengers pass through Bristol Temple Meads station every year, comprising a mix of leisure travellers, commuters and business travellers. These passengers generate an available non-grocery spend of £118m, with a further £15m available for grocery spend. If the retail and food and beverage opportunities were improved, it is estimated that current rail passengers have the potential to support a turnover of £22m.

Figure 201 Retail contextual data

Future retail catchment streams
New developments within BTQ and St Philip's Marsh would provide additional demand streams which are expected to contribute to the future market size available within the catchment area. It is essential that retail and services are built alongside new dwellings to retain spend within the quarter, as the extensive city centre retail offer is likely to capture a large proportion of this spend.

There are 6 large housing developments proposed within the BTQ and St Philip's Marsh catchment area in the coming years, including the Paintworks (Phase 3), Bath Road, Bedminster Green, Silverthorne Island, Redcliffe Quarter and Callowhill Court. Based on the average household size in the catchment, if these schemes come to fruition an additional residential Non-Grocery market size of £16m and Grocery of £8m will be available.

There are currently 51,000 students in Bristol, studying at both the University of Bristol and at the University of the West of England and plans for the University of Bristol's Enterprise Campus include an additional 1,500 residential units. These students and support staff are estimated to be worth £8m in total spending potential, £3m of which will be from Grocery.

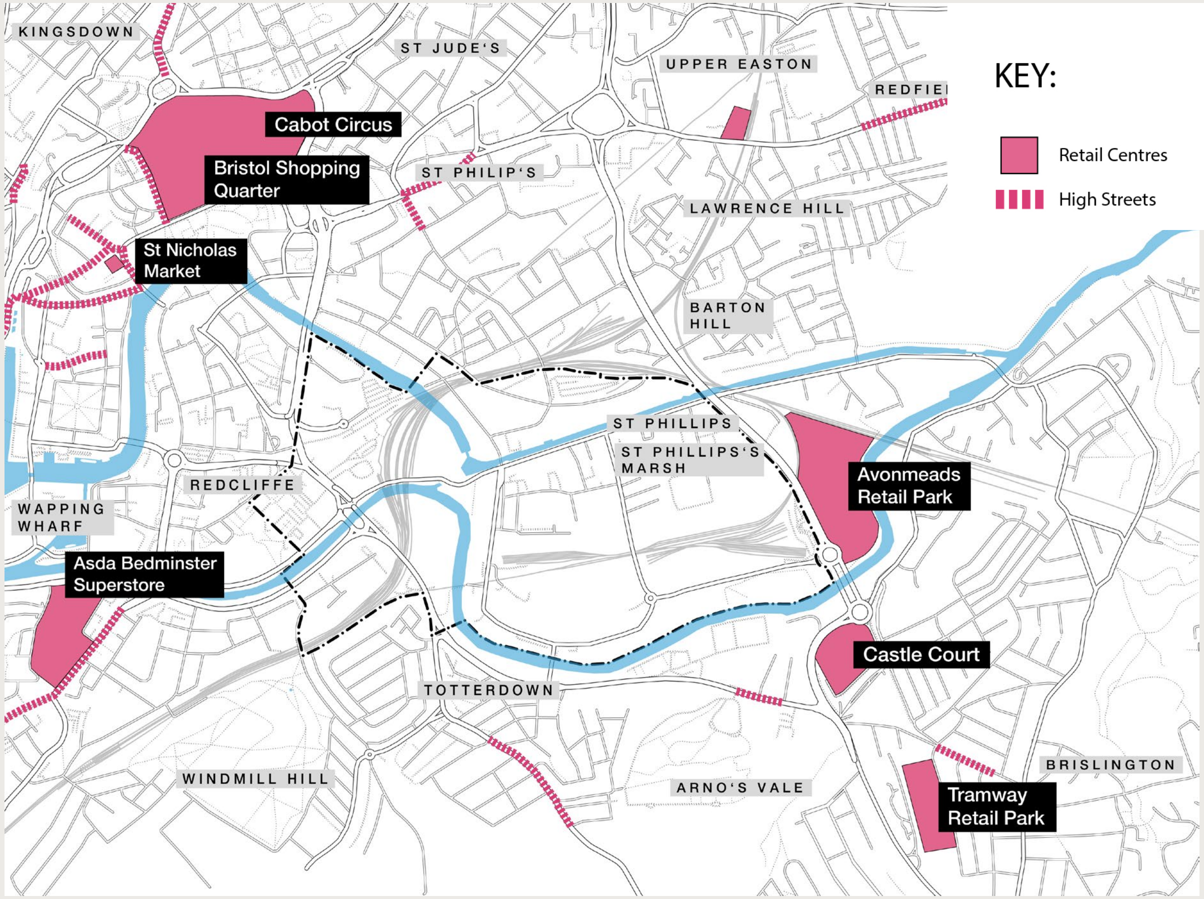


Figure 202 Retail context

Heritage (2020)

The following listed buildings (and their associated curtilage) are within the Temple Quarter Development Framework area:

- Temple Meads Station (Grade I)
- Bristol Old Station (Grade I)
- Bristol and Exeter Building (Grade II*);
- The George Railway Hotel (Grade II)
- Sign post and three lamps, at intersection with Well Road (Grade II*)
- St Vincent's Works and attached front area railings (Grade II*)
- Warehouse, former premises of Marble Mosaic Company (Grade II);
- Gasworks perimeter wall (Grade II);
- St Vincent's Works, gateway and attached wall to southwest (Grade II)
- St Vincent's Works factory (Grade II)
- St Vincent's Works north gateway and attached walls (Grade II)
- Warehouse, premises of Clarks Wood Company (Grade II)
- Langton Street Bridge (Grade II)

In response to the historic significance of the area, the following heritage design principles are to be applied in this Development Framework and through its later stages of development.

Bristol Temple Meads station heritage design principles

- Care and celebration of the exceptional Grade I buildings will be fundamental to the future of the station
- Exploit the character and significance of both old and Joint stations positively, both their superb internal spaces and townscape and architectural presence
- New entrances and permeability are required, but the Main Entrance and approach ramp should retain a meaningful function

Bristol Temple Quarter & St Philip's Marsh heritage design principles

- The water-bodies and their distinctive characteristics should be positively integrated into the form and development of the quarter.
- Surviving elements of the industrial past of the quarter should be incorporated into place making, where they have significance (designated and non-designated).
- Historic roads and movement routes create a unique urban grain that provide a continuity with and evidence of the past, and should be incorporated into future development.
- The significance of railway infrastructure should be taken into account in proposals to improve movement into and across the quarter.
- Surviving C19 terraced houses and other non-designated heritage assets associated with the former community on St Philip's Marsh should be positively integrated into the future development of the quarter.
- The site's archaeological potential to reveal evidence of its past use and occupation should be appropriately understood and considered during the implementing the Development Strategy
- The new skyline and roofscape should respect and contribute positively to wider views and the setting of heritage assets, drawing inspiration from the characteristics of the quarter.

Appendix E Stakeholder engagement responses and outcomes

Stakeholder engagement responses and outcomes

From the stakeholder engagement process (outlined in Section 2.5.13), a selection of key themes were identified. In particular, the vital importance and urgency of improving transport was emphasised repeatedly. The table below summarises how the Development Framework has responded to these and where they are demonstrated:

Guiding Principle	You said	We did
INTEGRATED AND CONNECTED	Consider the safety of riverside routes and pathways adjacent to busy roads.	Improved pedestrian routes around the station such as the Friary (Section 6.6), Temple Gate (Section 8.5), complemented by the Floating Harbour Walkway (Section 2.4). St Philip's Marsh development includes significant improvements to Feeder Road and the River Avon Path (Section 10.6) subject to detailed design. The A4 Bath Road presents challenges due to traffic levels, multiple bridges and land ownership. A widened pedestrian/cycle bridge is proposed over the River Avon (Section 6.6) to the Southern, but further work is needed along this corridor.
	Integrate with existing surrounding networks including pedestrian and cycle routes and bridges.	Improved pedestrian and cycle routes around the station such as the Friary (Section 6.6) and Goods Yard (Section 7.5), providing a better links between the station, the Brunel Mile and the Bristol to Bath Railway Path. Closer pedestrian and cycle access to the station from south Bristol via the Southern Gateway (Section 6.6), complemented by the new Eastern Entrance (Section 2.4). New permeability and routes in Temple Gate (Section 8.5) and St Philip's Marsh (Section 10.6).
	Consider parking implications of the masterplan in parallel with parking controls and alternative forms of transport.	The new City Gateway proposes a phased relocation of surface parking around the station to unlock the potential of this area, providing a degree of station parking in the Southern Gateway (Section 6.6). Near-zero car parking is proposed for new offices in the Friary North to fulfil the vision for this area (Section 7.5). Minimal parking is proposed for new, mixed-use developments in Temple Gate (Section 8.5) and St Philip's Marsh (Section 10.6).
	Consider onward travel provision from the Eastern Entrance.	This area is being designed by the University of Bristol in liaison with Bristol City Council. Initial proposals were outlined in the public consultation (University of Bristol, September 2019).
	Ensure continuity of routes in the BTQ masterplan area through the development and construction process.	Minimising disruption for movement routes was a key consideration in developing proposals inside the station (Section 5.5), particularly the capacity of internal circulation routes. Outside the station, indicative phasing has been developed (e.g. Section 6.7 around the Northern Entrance) but further work will be required during design.
	Engage with appropriate transport stakeholders throughout the masterplan and delivery process.	Extensive engagement has been undertaken with transport professionals and stakeholders, as outlined in Section 2.5.13. Further consultation and collaboration will be required during next stages of design, as recommended in Section 4.4.
	Through the masterplan make Bristol a European standard of walking and cycling.	Pedestrians and cyclists have been prioritised throughout, particularly around the station (Section 6.6) and within new developments. The eventual redevelopment of St Philip's Marsh has significant potential for world-class active travel (Section 10.6). However, due to the emphasis on deliverability, it is recognised that infrastructure improvements in areas such as the A4 Bath Road are more modest and will require further work and funding in future.

Guiding Principle	You said	We did
INTEGRATED AND CONNECTED	Ensure disabled access through collaboration and ongoing engagement.	This is particularly pertinent for Bristol Temple Mead Station. An indicative sequence of development has been identified for Bristol Temple Meads Station (Section 5.6) and the City Gateway (Section 6.7) to maintain step-free access and minimise distances throughout construction. Local user groups, including disability groups, have been consulted through the Diversity Impact Assessment and Equality Impact Assessment. These are both 'live' documents, to be revisited during later stages of design and construction planning.
	Consider the ease of transferring between modes including the distance from bus stops and to Temple Meads station.	Options for interchange between different modes of transport are presented in the City Gateway chapter (Section 6.6). The constraints of land ownership make it difficult to bring buses closer to the station, but the proposed 'dispersed' layout would improve the movement conflicts currently prevalent on the Station Approach.
	Reduce conflict between pedestrians and cyclists.	Where possible, pedestrian and cycle routes have been segregated, such as around the Friary (Section 6.6). Further work will be required during next stages of design for more detail.
	Ensure permeability of the masterplan to cyclists and integration with the wider cycle network.	Proposals have been developed to improve links between cycle routes around the station, such as the Brunel Mile/ Portway and Bristol to Bath Railway Path (Section 6.6). New cycle routes are proposed in developments such as eventual redevelopment of St Philip's Marsh (10.6)
	Incorporate adequate capacity of cycle storage at Temple Meads station.	Following an initial decant from the platforms to the Friary (Section 6.6), high-capacity cycle parking is proposed near the Northern Entrance (Section 7.5), with additional opportunities in the Southern Gateway (Section 6.6).
	Consider the different constraints and opportunities for buses and coordinate with bus companies in the development of the bus strategy and make this available for review. This is particularly relevant with respect to bus access to St Philip's Marsh.	The proposals around Bristol Temple Meads have continued to adopt the principle of a dispersed interchange, as set-out in the BTQEZ Spatial Framework. During the development of options, the Friary was selected as the preferred location for those buses that terminate at the station. First Bus were consulted as part of the transport engagement (Section 2.5.13). Opportunities for new bus routes in St Philip's Marsh are presented in Section 10.6, subject to further consideration.
	If improving the ferry provision, ensure that this is accessible to disabled people.	Provision of ferry services is beyond the scope of this Development Framework. Step-free access to the Temple Quay Amphitheatre stop has not been explicitly proposed in this masterplan due to relatively low patronage, but could be installed in future.
	Ensure that this considers provision for future expansion and integration with potential Mass Rapid Transit facilities.	Plans for mass transit are emerging (see Section 6.2). Passive provision for a hub has been proposed in the Goods Yard (Section 7.5), Skanska Site (8.5) and the Southern Gateway (Section 6.6), but further work will be required.
INTEGRATED AND CONNECTED	Appropriately locate taxi ranks at entrances to Temple Meads station.	Options for taxi ranks have been assessed as part of this study. The preferred solution is continued use of the Station Approach, as presented in the City Gateway chapter (Section 6.6).

Guiding Principle	You said	We did
	Consider parking provision in the context of the climate emergency and discourage people to use cars.	The new City Gateway proposes a phased relocation of surface parking around the station to encourage modal shift towards active and public transport. A permanent home for station parking is proposed in the Southern Gateway (Section 6.6). Near-zero car parking is proposed for new offices in the Friary North to fulfil the vision for this area (Section 7.5). Minimal parking is proposed for new, mixed-use developments in Temple Gate (Section 8.5) and St Philip's Marsh (Section 10.6).
	Ensure dwell time restrictions and a drop off zone are incorporated in the masterplan.	A new drop-off is proposed on Temple Back East and in the Southern Gateway (Section 6.6). Operational management, such as dwell times, are to be determined in more detail in the next stage of design.
INCLUSIVE ECONOMIC GROWTH	Ensure positive delivery in the short, medium and long term.	Delivery of short, medium and long-term benefits has been a key consideration in all areas of this Development Framework. This has particularly influenced the proposed phasing and prioritised projects in the 'Making it happen' sections of Chapters 5-10.
	Create a holistic development plan that balances tensions between use types and seek wider funding and interventions to support delivery.	The proposals presented in this Development Framework have been subject to an iterative design and deliverability process to determine an appropriate balance of land use. The 'Making it happen' sections of Chapters 5-10 presents the main delivery considerations.
	Consider the ownership and control of land in delivery.	Land ownership is a key constraint, as summarised in Section 2.5. This has been a key consideration in developing proposals to maximise their deliverability. Further consultation with landowners and design development is recommended for each area, particularly those presented to Development Framework level of detail (Temple Gate and St Philip's Marsh).
	Undertake a phased approach including early dialogue with interested landowners.	Engagement with private landowners has not been undertaken during this study; part of the rationale for presenting some areas to Development Framework level of detail. This is recommended as a priority next step in the 'Making it happen' part of Chapters 8 and 10 (Temple Gate and St Philip's Marsh).
	Target funding to unlock development across the wider St Philip's Marsh as well as Temple Meads.	Funding sources have been identified for Bristol Temple Meads (Section 5.6), the City Gateway (Section 6.7) and other character areas. The infrastructure required for redevelopment of St Philip's Marsh presents funding challenges, as outlined in Section 6.7.
	Ensure the masterplan considers modelling of fluvial and tidal flooding.	Fluvial and tidal flooding have been considered throughout this study. This is primarily applicable for St Philip's Marsh, with significant flood resilience proposals presented in Section 10.6.
QUALITY PLACES	Consider the appropriate density for housing and the mix of land uses.	The study area has been subdivided into several smaller character areas, each suited to a different mix of land use and density. For example, Temple Gate is anticipated to be high-density residential and offices (Section 8.5) due to its city centre location, whereas St Philip's Marsh (Section 10.6) is more suited to lower density housing.
	Ensure that building heights create a human scale development.	Building heights have been considered with respect to existing policy (such as the BTQEZ Spatial Framework and Draft Policy UL2), the topography of the land and the placemaking objectives for each area.

Guiding Principle	You said	We did
	Ensure provision for small scale business and positive mixed use development.	The exact size and of buildings is beyond the scope of this study. Opportunities within the Enterprise Zone will primarily cater for larger businesses, but a flexible framework has been presented for St Philip's Marsh (Section 10.6) which can be developed to support small businesses through mixed-use developments.
	Provide access to and view of nature.	This Development Framework proposes a range of new green infrastructure, such as the Goods Yard (Section 7.5). Additional opportunities exist in St Philip's Marsh, particularly Sparke Evans Park (Section 10.6)
	Ensure that the masterplan consider its relationship beyond its boundary with the wider city.	The wider context of the city has been evaluated in Chapter 2, including housing, employment and movement. Proposals for each character area have been developed to respond to their local surroundings, as presented in Chapters 7-10.
	Protect and enhance parks and recreation.	The main opportunities for parks and recreation include the Passenger Shed (Section 7.5) and in the redevelopment of St Philip's Marsh (Section 10.6)
VIBRANT AND CREATIVE COMMUNITIES	Promote a balance between housing provision and employment.	In response to the housing and employment needs in the city (see Chapter 2), the proposals presented in this Development Framework have been subject to an iterative design and deliverability process to determine an appropriate balance of land use as presented in Chapters 7-10.
	Continue to engage broadly.	Engagement with businesses, communities and other stakeholders has been undertaken as presented in Section 2.5.13. Further engagement is recommended as next steps in Section 4.4.
	Consider creative solutions and approaches which bring in local knowledge, expertise and research.	This study has been led by a local team with extensive knowledge of Bristol, complemented by the engagement process summarised in Section 2.5.13. Further opportunities exist to utilise local expertise in the next stages of design.
	Incorporate smart city principles.	Smart city infrastructure provision has been incorporated throughout, with many potential opportunities in further stages of design.
	Deliver appropriate affordable housing.	An affordable housing allowance of 40% has been incorporated throughout this study, as presented in Chapters 7-10.

For more information,
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