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Braintree District Employment Land Needs Assessment

Final Report

Prepared for Braintree District Council

August 2015

REVISION SCHEDULE					
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TABLE OF CONTENTS

ABBREVIATIONS

BDC	Braintree District Council
BRES	Business Register Employment Survey
ELNA	Employment Land Needs Assessment
CAGR	Compound Annual Growth Rate
EEFM	East of England Forecasting Model
ELR	Employment Land Review
ICT	Information and Communications Technology
LDF	Local Development Framework
NPPF	National Planning Policy Framework
ODPM	Office of Deputy Prime Minister
ONS	Office of National Statistics
MPPA	Million Passengers Per Annum
PMA	Property Market Area
PPG	Planning Policy Guidance
R&D	Research and Development
SHLAA	Strategic Housing and Land Availability Assessment
SHMA	Strategic Housing Market Assessment
SADMP	Draft Site Allocations and Development Management Plan
SME	Small and Medium Sized Enterprises
SSA	Site Specific Allocation
VOA	Valuation Office Agency

EXECUTIVE SUMMARY

Context and Objectives

Braintree District Council commissioned AECOM Infrastructure and Environment UK Ltd (AECOM) to undertake an Employment Land Needs Assessment (ENLA) for the District, contributing to the evidence base of the new Local Plan. The ELNA assesses the quantity and quality of the District's employment land to form an evidence base to inform the approach to the provision, protection, release or enhancement of employment land and premises over the long term, covering the new Local Plan period of 2015-2033. Employment land and premises are defined as commercial and industrial uses falling into use class orders B1a/b/c, B2 and B8.

This assessment takes into account the following considerations:

- Changes to National Planning Policy: this assessment considers call for sites locations with the potential to meet economic development needs, and takes into account wider employment uses such as utilities, land for transport and waste management.
- Housing Growth: there is potential for a step-change in the provision of housing in the District, which would have a consequential change in the size of the local labour force supply.
- Regeneration Initiatives: Initiatives are in place to encourage the regeneration of the three major town centres of Braintree, Witham and Halstead to improve the retail and local economic offer.
- Economic Drivers: we assess the extent to which the District can capture additional economic growth from neighbouring competing centres, building on requirements such as the right relative market conditions and appropriate infrastructure, including the appropriate form of accommodation for start-ups and growing businesses.

Study Area

The ELNA covers the whole of the District of Braintree considering its employment land in the context of the wider Property Market Area (PMA), which also contains Chelmsford, Colchester and Uttlesford. The District, located in north Essex, is a mixed urban/rural area, with its three main towns are located towards the south.

The location of towns and villages and strategic road connectivity has influenced the distribution of employment land across the District, which lies in close proximity to the larger conurbations of Chelmsford and Colchester. Crossing the District are two strategic roads. The A120 trunk road runs east-west connects Braintree to London Stansted Airport and the M11.

The largest town in the District, Braintree has a large stock of employment land, most notably at the Springwood Industrial Estate, and is best positioned to capture the economic benefits associated with proximity to London Stansted Airport. Witham, towards the south of the District, is located in close proximity to the A12, connecting to Colchester and Chelmsford. Witham's employment land is split between a town centre office market, which benefits from regular rail links to London, and the Witham Industrial Estates. Halstead, the smallest of the three main towns, lacks the strategic connectivity of Braintree and Witham. Employment land is minimal in the town centre, with the majority of provision at the Bluebridge Industrial Estate at the town's eastern fringe. In addition, limited amounts of employment opportunities tend to be scattered throughout the District, across its six villages and smaller settlements in rural locations.

Policy and Literature Review

At the regional level Braintree falls within the South East (SE) LEP boundary. The District is part of the A120 Haven Gateway which has been designated by SELEP as an enterprise corridor where much of the employment growth will be generated in the District. Essex County Council's Economic Growth Strategy sets out an economic vision for the county which aims for Essex to continue to specialise in growth sectors such as advanced manufacturing, low carbon technologies and logistics. Within the sub-region policy documents of local authority areas adjacent to Braintree District Council (BDC) area suggest, collectively, there is an aspiration for upwards of 36,900 additional jobs.

For Braintree District, growth is heavily influenced by the District's proximity to London, the Cambridge-London corridor, regional growth centres and strategic transport networks. BDC's Core Strategy seeks to retain employment uses on existing employment sites, mixed use regeneration sites and two strategic sites located to the north-west of Panfield Lane in Braintree and to the west of the A131 at Great Notley. Masterplans have been prepared for Greater Notley, Premdor/Rockways Regeneration Site and North West Braintree which will include employment land to help meet any future demand. The Braintree Economic Prospectus[1] identifies that employment land in Braintree is competitively priced, but there are some barriers to growth such as the need for investment in traffic infrastructure which could improve the District's economic attractiveness (through for example affecting journey times and reliability which is particularly important for distribution activities and just in time supply chain activities.

The Local Economy

The analysis informs an understanding of the economy's strengths and weaknesses and the implications for future employment land and premises. The findings are summarised below.

Research into the characteristics of residents and the local workforce found that an average number of residents hold some form of qualification, although the proportion of residents holding qualifications above NVQ1 are below the Essex and national averages. More specifically, a skills gap may exist for young residents (aged 16-24), who are less likely to hold any form of qualification or be qualified to degree level. A continuation of this skills gap may result in many residents relying on employment in low-skilled occupations, typically located on industrial land. However, a typical resident of the District has a higher income than across Essex and England, while in contrast those who work in the District earn relatively less on average.

Braintree District has a low rate of self-containment: more residents leave the District to work elsewhere than are retained as part of the workforce population. Common destinations for out-commuters include other key employment sites in Essex, such as Chelmsford, Colchester and London Stansted Airport, while the largest export of workers is to London. Of the jobs in the District, approximately two-thirds are taken up by residents.

More employment in the District is associated with office premises than manufacturing or warehousing, although the share of office employment is significantly below Essex and England averages. Despite this, many traditional office-based sectors, such as finance & insurance, have experienced strong recent growth. The relatively large proportion of industrial-type occupations is reflected in its relative strength in construction, manufacturing and wholesale sectors. However, many traditional office-based sectors, such as finance & insurance, have experienced strong recent growth, suggesting that this is potentially an area for further employment growth in the future.

Supply of Employment Land

We undertook desk-based research and a field survey to identify the suitability of land and premises in Braintree District for employment uses (office, B1a/b; industry, B1c/B2;

[1] Braintree District Council, (2013); Braintree District Economic Development Prospectus 2013/2026

and warehousing, B8). The survey methodology and criteria are based on factors and issues set out in the National Planning Policy Framework and Planning Practice Guidance. The clusters assessed were selected and agreed in consultation with the Council, consisting of identified employment areas as defined by the Pre Submission Site Allocations document, strategic sites and mixed-use regeneration sites as identified by the Core Strategy, call for sites identified for employment use and any other clusters over 0.25ha in size considered suitable for survey.

The survey identified five broad types of premises that are found on employment clusters. These typologies vary in use class, size, quality and type of occupier, and help understand the supply and types of premises that businesses occupy in the District. They are identified as follows:

- Small office units (use classes B1a/b): the District contains a small quantity of often converted or refurbished units that tend to be located in secondary locations or rural areas. Improvements in technology and access to broadband internet connections have shifted the specifications required by businesses, with high value occupiers placing a greater focus on the quality of environment as opposed to location.

- Medium sized office units (use classes B1a/b): these units tend to be multi-storey, housing one large occupier, with the small number most commonly observed in town centre areas, most notably in Witham. Where larger space is observed, it tends to be purpose built and older in age, with little new development observed across the District. Without sufficient grow on space to allow small enterprises to expand, there is a risk of either constraining business growth or the entire relocation of businesses to other areas with more suitable facilities.

- Small warehouse and small workshop units (use classes B8 and B1c/B2): designed with roll shutters to provide both manufacturing and warehouse functions, this is the most common typology in the District, although the quality of units is often poor. These units tend to suffer from a more marginal location and suffer a greater degree of erosion to other uses.

- Large manufacturing units (use classes B1c/B2): the District houses a small number of large manufacturing premises, the characteristics of which are often determined by the specific needs of the occupier. These premises tend to be located in rural, isolated areas; and

- Medium/large warehouse units (use classes B8): characterised by steel frame, curtain wall, high eaves, stand-alone sheds, this typology is commonly located in areas with strong links to the strategic road network. There are a number of well performing industrial areas found in conventional fringe of town locations with good access to the strategic road network. Areas with direct strategic road access, the majority of which are to the south of the District, are in a better position to attract occupiers associated with the regional logistics market. Large and in functional use, there are few signs of contraction in these key locations, with vacancy generally observed to be very low. There is little evidence of the long-term underlying trend of a contraction in industrial uses, with greater demand for distribution and logistics provision at these sites.

Demand Assessment

We have carried out a quantitative assessment of the demand for office (B1a/b) and industrial (B1c/B2/B8) floorspace in Braintree District. The approach builds upon the EEFM projection of future floorspace demand by use class, from which demand for employment floorspace is derived. This projection is then adjusted on the basis of a series of local factors and drivers of economic chance, which consist of trends that are not captured in historic data, and hence are not included in the EEFM projection. These local factors and drivers of change are as follows:

- Housing growth: the potential for an above-trend increase in the resident population, driven by increases in housing provision, will increase demand for local employment, while increasing demand for local goods and associated employment.
- Dualling of the A120 and Haven Gateway Growth Corridor: the potential for dualling of the A120 between Braintree and Marks Tey within the plan period will promote the District as a location for employment activity, improving a strategically important link to anticipated growth at the Haven Ports.
- London Stansted Airport: anticipated growth in passenger traffic will have positive spillovers to the local economy. However, growth in freight traffic is constrained and unlikely to result in a substantial uplift to employment land demand in the District.
- Technological Innovation: increasing access to new technologies may increase the mobility of the workforce, reducing businesses' space requirements.
- Home Working: similarly, changing attitudes towards home working may reduce the quantum of space required per employee.

The forecast concludes that over the local plan period demand for office floorspace is likely to increase by between 49,400sqm and 61,800sqm, and for warehousing increase by between 38,800sqm and 47,400sqm. The demand for manufacturing floorspace is however anticipated to decrease though by between -29,000sqm and -35,400sqm.

Gap Analysis: Comparison of Supply and Demand

The net requirement for office floorspace and industrial land is calculated across the plan period, 2015-2033. It considers the additional need to provide for other suitable uses of employment land, such as waste management and recycling facilities, while ensuring that a sufficient vacancy exists to allow for an efficient churn of occupancy between businesses. Because of the mix of densities of office developed in Braintree District, it is not meaningful to translate floorspace into land requirements. The additional office requirement is therefore represented in terms of floorspace, while industrial requirements are considered in terms of land.

The forecast for office floorspace calculates an additional net requirement of between 53,400sqm and 66,800sqm in Braintree District up to 2033. The most likely scenario is an additional requirement for 60,000sqm, which equates to an average increase of 3,300sqm per annum over the plan period. This represents an increase in the rate of provision over what is observed historically.

The forecast for industrial land (manufacturing and warehousing) calculates that there is a deficit of employment land in the District in the region of between 7.5ha and 11 ha. The medium scenario is an additional requirement for 9.2ha of industrial land between 2015 and 2033. However, a large component of the net requirement is due to a tight supply position with sub-optimal levels of vacancy preventing businesses from moving to or within the District in order to grow or downsize. This translates as a need for additional frictional vacancy.

Conclusions

The Council has aspirations to improve the District's economic profile over the new Local Plan period. A potential driver of change could be the increase in housing provision. New housing will increase the residential population and the pool of local labour (assuming people of working age population move into the new housing). A key question is whether the District could increase its employment base by growing existing businesses and attracting new businesses to provide jobs for new residents and reduce out-commuting. The desire would be to see growth and provision of higher value jobs in the local area which local people could access and benefit from. Additionally, economic activity stimulated by new residents would increase the size of the local economy and could offer opportunities for regeneration and economic development.

The District has significant aspirations to improve the local economy and benefit residents but it is important to remain realistic with what it can achieve and recognise that there are a range of factors which interact with and drive the local economy that are outside its control. As such we believe the best way to plan for change is to do so by understanding both its past trends and future prospects.

Recommendations

Based on these conclusions our recommendations are set out below:

R1 The demand assessment estimates that, under the medium demand scenario, there will be a net additional requirement for 60,000sqm of B1 floorspace in the District of Braintree over the Local Plan period to 2033.

In order to meet this demand requirement, the Council should support the provision and retention of existing B1a/b use classes across the District and, in addition, promote the provision of new B1a/b use class employment land and premises at suitable locations. These locations are:

- In the town centres of Braintree, Witham and Halstead, where development opportunities arise and in particular at C10 in Halstead town centre south on land which is vacant or with derelict buildings (though office provision at C10 could come forward as part of a mixed use scheme)
- C34, Maltings Lane (Gershwin Park), which is currently being promoted for B1a/b use classes
- C31, land to the west of the A131 at Great Notley (Eastlink 120); and
- C30, land to the north west off Panfield Lane.

The provision of new office space should complement existing provision and help to support and encourage a range of businesses to grow and invest in Braintree District from start-up, micro, small to medium sizes businesses, and large businesses too, should interest be received.

In particular there is an opportunity to promote small size office units to accommodate the needs of small sized businesses. This should be affordable flexible business space located in accessible locations with proximity to amenities such as town centres, where there is capacity for new office provision, and/or as part of mixed-use schemes such as C34, Gershwin Park; C31, land to the west of A131 at Great Notley; and C30, land to the north west off Panfield Lane.

We are aware of a planning application to construct an enterprise centre at Land Adjacent to Lodge Farm in Witham (to be called Witham Enterprise Centre). Were this application to be granted, Witham Enterprise Centre [60] would meet part of the additional floorspace requirement for small business flexible office space.

R2 To support the provision of office space at C34, Malting Lane Business Park (Gershwin Park), as set out in R1 above, the Council should continue to designate land as a Business Uses area and promote 3.8ha of the cluster for office provision.

R3 The Council should consider re-designating C10, Halstead Town Centre South as a mixed-use cluster. Proposals for redevelopment should be either compatible with the operations of existing industrial businesses or ensure that the 2.2ha of land which currently supports B-use class business activities is re-provided on site or elsewhere in the District. The mixed uses designation should allow redevelopment for industrial, office, retail, leisure and residential uses.

R4 To support the requirement for a net additional 9.2ha (medium scenario) of land for industrial uses over the plan period to 2033, the Council should support development of clusters which are currently functioning well as employment locations which have vacant land, land with derelict buildings or have underutilised land and premises. These locations are:

- C9, Broton Drive Industrial Area, Halstead
- C13, Riverside Business Park, Earls Colne
- C15, Springwood Industrial Estate
- C18, Skyline 120[2]
- C19d, Braintree Town Centre; and
- C26, Eastways, Witham Industrial Estate.

In addition, to ensure occupiers have a range of locations to choose from the Council should promote and encourage development at new sites which display good strategic characteristics and potential for industrial use. These new sites could include:

- Call for sites RIVE362 and RIVE363 adjacent to C26 (Eastways, Witham Industrial Estate)
- Call for sites GOSF249, adjacent to C8 (Gosfield Airfield)
- Call for sites BOCS138 and 141 adjacent to and overlapping with C15 (Springwood Industrial Estate), and PANF136 adjacent to C30 (Land to the North West off Panfield Lane)
- Call for sites COLE188, HASA288 or GGHR282 which are adjacent to C11 (Bluebridge Industrial Estate); and
- Call for sites EARC226 which is adjacent to C14 (Earls Colne Airfield).

There is also an opportunity to promote flexible and small size workspace units to accommodate the needs of business start-up and small size businesses. Affordable and flexible business space should be promoted as part of sites, where there is capacity, and as part of mixed-use schemes.

R5 To support the net additional growth of industrial space as set out in R4 above, the Council could consider designating a proportion of the following Call for Sites for industrial B1c/2 and B8 use class activities:

- Call for sites RIVE362 and RIVE363 adjacent to C26 (Eastways, Witham Industrial Estate)
- Call for sites GOSF249, adjacent to C8 (Gosfield Airfield)
- Call for sites BOCS138 and 141 adjacent to and overlapping with C15 (Springwood Industrial Estate), and PANF136 adjacent to C30 (Land to the North West off Panfield Lane)
- Call for sites COLE188, HASA288 or GGHR282 which are adjacent to C11 (Bluebridge Industrial Estate); and

[2] However, it is noted that the Council has received a recent planning application as this site (15/00582/FUL). Were it to be successful, Skyline 120 would no longer provide prospects for additional development for employment uses.

- Call for sites EARC226 which is adjacent to C14 (Earls Colne Airfield).

R6 A number of clusters are not performing well or are judged to be less suitable for use as industrial locations. The Council could de-designate the following Employment Land Areas:

- C2, Slate Hall Farm, Helions Bumpstead
- C4, Greenfields Creation, Ridgewell
- C5, Hunnable Industrial Estate, Great Yeldham
- C6, Former Tanner’s Dairy, Oxford Lane, Sible Hedingham
- C16, Broomhills Industrial Estate
- C17, Bovington Road, Bocking Churchstreet; and
- C24, Kelvedon Railway Station.

R7 Monitoring: The Council should monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the planned period, 2015 to 2033.

1 INTRODUCTION

1.1 Context and Objectives

Braintree District Council (BDC) is in the process of preparing a new Local Plan. The Local Plan will cover the period up to 2033 and will replace the existing adopted Local Plan Review 2005 and the Core Strategy 2011.

As part of this process, BDC commissioned AECOM Infrastructure and Environment UK Ltd (AECOM) to undertake an Employment Land Needs Assessment (ENLA) for the District. The ELNA assesses the quantity and quality of the District's employment land to form an evidence base to inform the approach to the provision, protection, release or enhancement of employment land and premises over the long term. The review builds on and updates aspects of the existing employment land study undertaken in 2007[3].

In addition to the process of preparing a new Local Plan there have been changes to how national planning policy requires local authorities to assess and plan for employment land provision, and change to local growth opportunities regarding housing and regeneration. We discuss these briefly below.

Changes to National Planning Policy

The National Planning Policy Framework (NPPF)[4] outlines the principles that Local Planning Authorities should follow in preparing their evidence base to inform employment land policies. The need for Local Planning Authorities to produce an up to date assessment of employment land, and the suggested format, is outlined in the Planning Practice Guidance (PPG) published in the March 2014. The PPG updates and supersedes the former guidance set out in the 2004 ODPM Employment Land Review Guidance Note. One of the key changes outlined in the PPG includes a requirement for a 'call for sites' to identify sites with the potential to realise economic development. A call for sites has been completed by BDC[5] as part of this study and consideration is given to either existing employment sites proposed by the site owner for change of use to non-employment uses or new sites with potential to meet economic development needs. The PPG also suggests that studies take account of wider employment uses such as utilities, land for transport and waste management.

The methodology applied in this ELNA complies with the principles and guidance outlined in the NPPF and PPG.

Housing Growth

The figures set out in the 2014 Strategic Housing Market Assessment (SHMA)[6], in support of the emerging new Local Plan, suggests the potential for an increase in housing provision from 4,600 (over the period 2009 and 2026) to approximately 14,000 homes (2017 to 2033). Should this increase in housing provision be delivered there would be a consequential change to the scale of local labour force supply and structure and demand change for retail, leisure facilities and community infrastructure. An increase in population arising as a consequence of housing growth has the potential to affect demand for employment land in the District.

Regeneration Initiatives

Initiatives are in place to encourage the regeneration of the three major town centres of Braintree, Bocking & Great Notley (referred to hereafter as Braintree), Witham and

[3] Llewelyn Davies Yeang, (2007); Braintree District Council Employment Land Review.

[4] NPPF, paragraphs 160 to 161.

[5] Braintree District Council, (2015); List of Sites Submitted to Call for Sites May 2015.

[6] Braintree District Council, (2014); Strategic Housing Market Assessment.

Halstead to improve the retail and local economic offer. The vitality of town centres is an important factor in creating an attractive business location that attracts inward investment. Promoting employment uses within town centres is also an important consideration in supporting the economic needs of the large rural population in the District. Two of the District's redundant factory sites have been identified as locations of change: the former Premdor/Rockways site in Sible Hedingham for mixed-use development, and the former Crittall works site in Silver End.

Economic Drivers

The ELNA takes into account the structure and performance of the local economy and how factors, which could influence the demand for employment floorspace, could change over time.

As part of that assessment, we consider the extent to which BDC can capture additional economic growth from neighbouring competing centres and by strengthening its links with key economic clusters outside the District. For instance, the District is in a position to attract businesses from the more traditional, sub-regional hubs of Chelmsford and Colchester and benefit from the spillover of economic activity. To do so requires the right relative market conditions and appropriate infrastructure including the appropriate form of accommodation for start-ups and growing businesses. This study also recognises the extent to which businesses in the District may benefit further from supply side linkages associated with proximity to the growing economies of Cambridge and London, and the transport hubs of London Stansted Airport and the Haven Ports.

In addition, the changing patterns of work such as home working are also considered. Improvements in technology over the past decade place less of an emphasis on location and the ability of businesses to be connected with and accessible to their client and customer base at a distance. Increasing the coverage of broadband internet services to rural parts of the District may alter patterns of work and are an important consideration in understanding the changing nature of work space requirements, and demand for flexible workspace for micro or small-sized businesses.

1.2 Scope

Definition of Employment Land

Employment land and premises are defined as commercial and industrial uses falling into use class orders B1a/b/c, B2 and B8. Descriptions of the B use classes are given in **Table 1.1**.

The assessment does not consider buildings used for health, education, retail or leisure purposes as the spatial planning requirements for these land uses are assessed in separate evidence base reports.

Table1-1 Use Class Descriptions

Use Class Order	*Description*
B1: Business	
B1a	Offices (other than those that fall within use class A2: Financial and professional services)
B1b	Research and development of products and processes
B1c	Light industry (compatible with residential areas)
B2: General Industrial	Use for industrial process other than one falling within class B1 (excluding incineration purposes, chemical treatment or landfill or hazardous waste)
B8: Storage or Distribution	This class includes open storage and self-storage

Study Area

The ELNA covers the whole of the District of Braintree considering its employment land in the context of the wider Property Market Area (PMA). The District, located in north Essex, is a mixed urban/rural area, with its three main towns are located towards the south.

The location of towns and villages and strategic road connectivity has influenced the distribution of employment land across the District, which lies in close proximity to the larger conurbations of Chelmsford and Colchester. Crossing the District are two strategic roads. The A120 trunk road runs east-west connects Braintree to London Stansted Airport and the M11. The largest town in the District, Braintree has a large stock of employment land, most notably at the Springwood Industrial Estate, and is best positioned to capture the economic benefits associated with proximity to London Stansted Airport. Witham, towards the south of the District, is located in close proximity to the A12, connecting to Colchester and Chelmsford. Its employment land is split between a town centre office market, which benefits from regular rail links to London, and the Witham Industrial Estates. Halstead, the smallest of the three main towns, lacks the strategic connectivity of Braintree and Witham. Employment land is minimal in the town centre, with the majority of provision at the Bluebridge Industrial Estate at the town's eastern fringe. In addition, limited amounts of employment opportunities tend to be scattered throughout the District, across its six villages and smaller settlements in rural locations.

Manufacturing and distribution comprise the main employment land activities within Braintree District. The office market is more limited in size, with larger provision of office space in Chelmsford and Colchester.

The process for selecting existing and potential employment sites to survey across the study area corresponds to the guidance set out in the PPG. Site and clusters include: Strategic Employment Sites and mixed use regeneration sites, defined by the Core Strategy[7]; Employment Policy Areas defined within Policy ADM15 of the Pre Submission Site Allocations and Development Management Plan[8] measuring over 0.25 hectares[9]; as well as sites proposed for employment uses identified through a call for sites. This long list of sites and clusters were agreed with the Council. Further details on the selection process of clusters for assessment are set out in **4.2** and **4.13**.

[7] Braintree District Council (September 2011); Core Strategy.

[8] Braintree District Council, (2014); Pre Submission Site Allocations and Development Management Plan.

[9] PPG, paragraph 011 reference ID: 2a-011-20140306

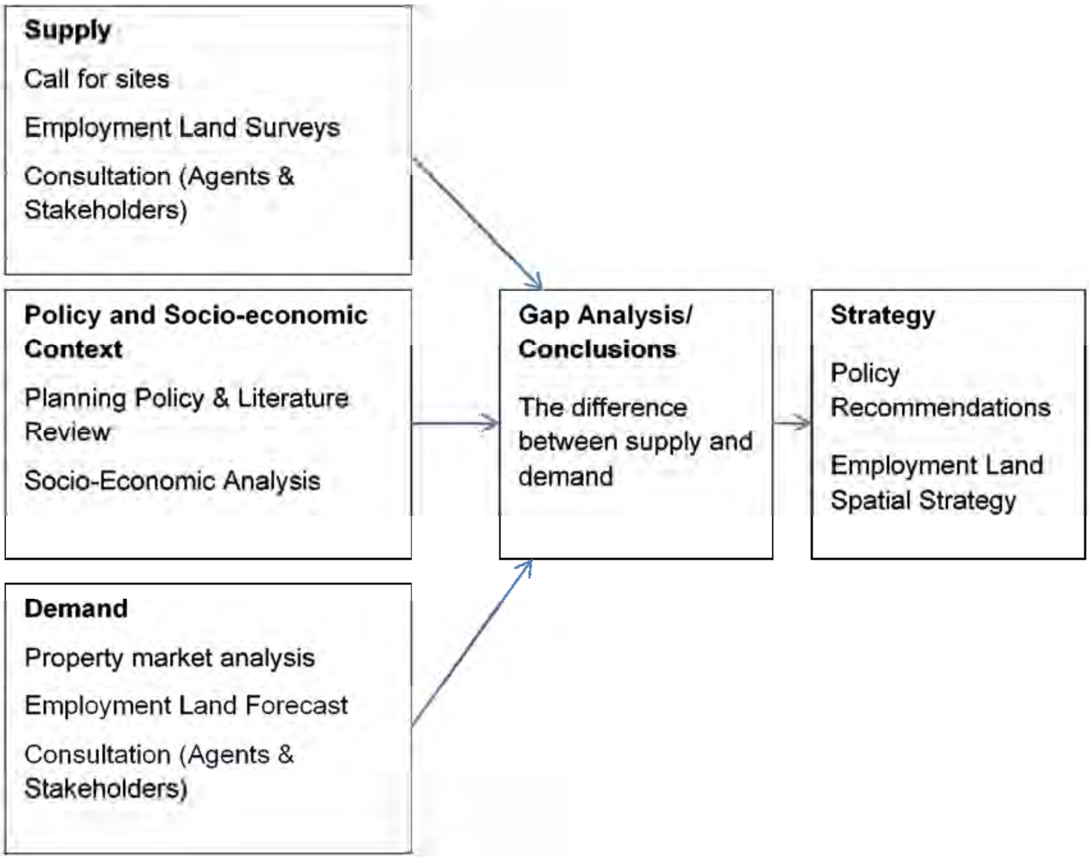
Assessment Period

The assessment period for this ELNA matches BDC's new Local Plan period: years 2015 to 2033.

1.3 Method and Report Structure

The component parts of this ELNA, in accordance with the PPG, are illustrated in the methodology diagram set out below.

Figure 1-1 Approach to the ELNA



Source: AECOM

The structure of this ELNA broadly corresponds to the approach set out above:

- Section 2 provides a review of the national, regional and local policy context and literature surrounding the economic needs and ambitions of the area;
- Section 3 an analysis of the local economy, considering the population and labour market, industrial structure and commuting patterns;
- Section 4 provides an appraisal of employment land clusters in the BDC, considering key criteria such as the quantity and quality of land and the typology of premises provided;
- Section 5 presents an assessment of employment floorspace and land demand over the planning period taking into account consultation findings with commercial property agents, business groups and key stakeholders. This includes consideration of factors specific to the District, such as the housing growth trajectory;

- Section 6 compares the findings from our supply and demand, which gives an indication of whether there should be retention or release or employment land for office or industrial uses; and
- Section 7, drawing on the preceding sections, concludes and proposes recommendations on the employment land allocations and policies supporting the District's economic development objectives.

Consultation with stakeholders, key businesses and commercial property market agents have informed the supply and demand evidence base and our conclusions and suggested recommendations for policy.

2 POLICY AND LITERATURE REVIEW

2.1 Introduction

In this section we set out our understanding of the current policy context which has implications of the review of employment land in Braintree District.

2.2 National Planning Policy

The National Planning Policy Framework (2012)

At the national level, the National Planning Policy Framework (NPPF)[10] replaced the Planning Policy Statements and Planning Policy Guidance from March 27th 2012, with the aim to make the planning system less complex and to promote sustainable growth.

The NPPF describes the Government's vision for building a strong, competitive economy. It sets out a presumption in favour of sustainable development in the absence of a local plan or where the plan is silent or indeterminate. This means that the ELNA and Local Plan should present robust evidence to support clearly defined allocations of land for employment to avoid applications for alternative use being granted on the basis they are sustainable development.

The NPPF recognises that the planning system plays an important role in promoting economic growth and building a strong, competitive economy. The NPPF sets guidelines for the preparation of local plans which includes setting out a clear economic vision and strategy; identifying strategic sites for investment; supporting existing businesses; and planning positively for the location, promotion and expansion of economic clusters. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances.

Planning Practice Guidance

On the 6th March 2014 the Government published new Planning Practice Guidance (PPG)[11] on 'Housing and Economic Development Needs Assessments' and 'Housing and Economic Land Availability Assessments' amongst others. This guidance replaces the ODPM Employment Land Reviews: Guidance Note (2004).

In economic development terms 'need' relates to the amount of economic development floorspace required based on a quantitative assessment and an understanding of the qualitative requirements of market segments. The PPG requires need assessment to be based on an objective assessment of the facts and should not be biased or influenced by constraints to the overall assessment or limitations imposed by the supply of land for new development, historic under performance, viability, infrastructure or environmental constraints.

To provide an understanding of the underlying requirements for office, general business and warehousing sites the PPG emphasises the importance of considering projections (based on past trends) and forecasts (based on future scenarios) and identifying occurrences where sites have been developed for specialist economic uses. The PPG requires plan makers to consider sectoral and employment forecasts and projections, demographically derived assessments of future employment needs, past take-up of employment land and property and/or future property market requirements, consultation and studies of business trends and statistics.

[10] Department of Communities and Local Government (DCLG) (March 2012) National Planning Policy Framework

[11] Department for Communities and Local Government, (2014); Planning Practice Guidance (PPG)

The revised guidance emphasises the following requirements for employment land reviews:

- A need to take account of the wider ‘functional economic area’ in which the local authority operates
- A greater emphasis on business engagement to help understand current and future requirements for employment land
- Consideration of the opportunities for providing employment space as part of mixed-use developments
- Increased integration of employment land studies and housing land assessments (SHLAA and SHMA scopes of work) to ensure that sites are allocated for the most appropriate use
- A more in-depth assessment of the ‘achievability’ and deliverability/viability of development of available or pipeline sites
- A supply side appraisal of all employment sites over an updated (lower) size threshold of 0.25ha; and
- Greater consideration of the legal or ownership problems that may affect the availability of sites, and the ways to overcome them.

The PPG requires a call for sites exercise to be undertaken, whereby landowners and developers are asked to submit sites with prospective employment and non-employment use for consideration. Braintree District Council undertook a call for sites between August and October 2014[12].

Permitted Development Rights (2013)

On 30 May 2013 changes were made to the permitted development rights. They permit change of use from:

- B1(a) offices to C3 residential use, subject to prior approval covering flooding, highways and transport issues and contamination (applies between 30 May 2013 and 30 May 2016).;
- Premises in B1, C1, C2, C2A and D2 use classes can change use permanently to a state-funded school, subject to prior approval covering highways and transport impacts and noise;
- Buildings with A1, A2, A3, A4, A5, B1, D1 and D2 use classes will be permitted to change use for a single period of up two years to A1, A2, A3 and B1 uses; and
- Thresholds for business change of use. Thresholds increased from 235 square metres to 500 square metres for permitted development for change of use from B1 or B2 to B8 and from B2 or B8 to B1.

The permitted development rights will only cover change of use: any associated physical development which currently requires a planning application will continue to need one. However, the change potentially makes valuable employment space more vulnerable to a change of use, and its implications are yet to be fully understood in areas such as Braintree District where opportunities for residential development are highly sought-after.

[12] More information can be found at:
http://www.braintree.gov.uk/info/200230/planning_policy/701/new_local_plan/3

Local Development Orders for Housing Development on Brownfield Land

Local Development Orders (LDOs) allow local planning authorities to grant permission for specific types of development without the need for developers to make a planning application. This process is intended to streamline the planning process[13]. The Department for Communities and Local Government (DCLG) has recently published a grant that allows local authorities to bid for up to £50,000 in order to support the preparation of LDOs for housing on brownfield land[14]. This grant supports the objective to ensure that LDOs granting planning permission for homes are in place on over 90% of suitable brownfield land by 2020. This will increase the pressure on local authorities to release brownfield sites for housing, to the detriment of employment uses.

2.3 Regional Planning Policy and Strategy

In 2010 the Government announced that national Planning Policy Statement 11: Regional Spatial Strategies would be abolished under the Localism Bill (introduced to Parliament in Dec 2010) [11]. The East of England regional spatial strategy (the East of England Plan) was abolished in January 2013.

As part of the localism agenda and devolution of decision making to local elected bodies, Local Enterprise Partnerships were set up to vision and strategic leadership and drive sustainable private sector-led growth and job creation. Located within Essex, Braintree falls within the South East LEP boundary.

South East Local Enterprise Partnership (LEP) Growth Deal and Strategic Economic Plan (2014)

The South East LEP is a voluntary partnership between local authorities and business that covers Essex, Kent and East Sussex. The Growth Deal and Strategic Economic Plan[15] aims to generate 200,000 private sector jobs, complete 100,000 new homes and lever £10bn of investment by 2021 in the South East area. The document identifies Braintree and Witham as located within the A120 Haven Gateway, stretching from Harwich International Port in the east to Bishop's Stortford and London Stansted Airport in the west. It identifies distinctive investment opportunities in the low carbon and renewables, manufacturing and logistics sectors. The growth capacity of this sub-region is constrained by limited capacity on the A120. The South East LEP has designated this as an Enterprise Corridor, backing a range of interventions that include dualling key sections of the road to improve access. As a result, the A120 Haven Gateway is anticipated to support approximately 4,800 jobs and 3,000 new homes by 2021, a proportion of which will be located within Braintree District.

Essex Economic Growth Strategy (2012)

The Essex Economic Growth Strategy sets out the economic vision for the County, discussing its approach in promoting economic growth. The document cites a skills gap, resulting from poor educational attainment, and congestion on the existing road and rail network as barriers to growth in Essex. Despite this, a number of potential growth sectors are identified. Construction employment is anticipated to increase with a wider economic expansion. It anticipates that the County can continue to specialise in the advanced manufacturing and technology, transport and logistics, renewable energy/low carbon technologies and the health and care sectors. The Essex Economic Growth Strategy is currently being revised.

[13] More information can be found at: http://planningguidance.planningportal.gov.uk/blog/guidance/when-is-permission-required/what-types-of-area-wide-local-planning-permission-are-there/

[14] Department for Communities and Local Government (DCLG), (2015); Local Development Orders for Housing Development on Brownfield Land

[15] Passed by Parliament and now the Localism Act 2011 Chapter 20

Superfast Essex – the Local Broadband Plan for Greater Essex (2012)

The Superfast Essex Plan[16] states the aim *'to make superfast and much improved broadband available to all and that more of Essex's citizens and business make more effective use of the internet'*. The plan aims to ensure that at least 90% of premises across the county have access to superfast broadband by December 2015. The plan also seeks to improve connectivity in town centres, aiming to establish roaming superfast internet access in order to attract businesses and customers to key growth sectors. Essex County Council[17] have since held a public consultation event during November 2014, to identify where broadband coverage for Phase 2 of the plan will be deployed, with the remit of delivering 95% superfast broadband coverage by 2017.

2.4 Local Planning Policy, Masterplans and Evidence Base Studies

Local Plan Review (2005)

The Local Plan Review, adopted in July 2005, set out the Council's development policies in the period up to 2011. It contains a number of policies relating to employment that are saved within the subsequent Core Strategy. Saved policies relating to employment across the District include the following:

- RLP 28, 'Employment Land Provision' allocates land on the main industrial estates and business parks for B use class employment land, the display, repair and sale of vehicles, sports and recreation uses.
- RLP 30, 'Diversity of Industrial and Commercial Premises', permits planning permission for B1, B2 and B8 uses only on sites of 1ha or greater in size, where a range of size and type of industrial and commercial premises are provided;
- RLP 33, 'Employment Policy Areas', refuses proposals for uses other than those within B use classes in defined Employment Policy Areas; and
- RLP 37, 'New Commercial and Industrial Activities within existing Residential Areas', permits the introduction of B1 uses into residential and other non-industrial areas only where this does not cause detriment to the character, amenities and health and safety of the surrounding area.

The Local Plan Review also includes a number of area specific policies, as follows:

- RLP 41, 'Employment Allocation, Springwood Drive, Braintree', allocates 3.5ha of land for B employment use and/or formal leisure use at the former Crittall Sports and Social Club site;
- RLP 42, 'Employment Allocation North of Bluebridge Industrial Estate', allocates up to 3.6ha of B uses directly north of the existing industrial estate;
- RLP 46, 'Earls Colne Airfield', allocates 1.07ha of employment uses at this site. This policy restricts the spread of industrial and commercial uses beyond the defined industrial area;
- RLP 47, 'Employment Allocation Inworth Road, Feering', allocates 2.7ha of land at Threshelfords Business Park for B1 use; and
- RLP 48, 'Comprehensive Development Area, Kelvedon', allocates the land adjoining the railway station as a Comprehensive Development Area, suitable for a combination of employment, car parking and housing uses. Any redevelopment must include the retention of small scale employment uses.

[16] Essex County Council, (2012); Superfast Essex – The Local Broadband Plan for Greater Essex

[17] Essex County Council, (2014); Superfast Essex Broadband Programme Phase 2

Core Strategy (2011)

The Core Strategy, adopted in September 2011 is the key policy document in the Braintree District Local Plan. It sets out the key elements of the spatial planning framework for the District over the period up to 2026, having particular focus on the regeneration of town centres and delivering new growth. The key objective relating to employment is to provide and retain employment in sustainable locations and to provide local employment opportunities, seeking to reduce travelling outside the District and to improve skills attainment. The Core Strategy also seeks to maintain and develop the function of the key service villages to support adjoining rural areas, by encouraging the retention and provision of employment and services, and the regeneration of appropriate sites. The Core Strategy establishes a 'hierarchy of place', which defines the order of size, function and importance of settlements in the District. The three Main Towns, Braintree, Witham and Halstead are supplemented by six Key Service Villages: Coggeshall; Earls Colne; Hatfield Peverel; Kelvedon; Sible Hedingham; and Silver End.

There are two policies of particular relevance to this study:

Policy CS4 relates to the provision of employment. It seeks to provide a minimum of 14,000 net additional jobs in the District between 2001 and 2026. Employment sites in current or recent use in sustainable locations will be retained for employment purposes. It states that land for employment purposes should be mainly located in three areas:

- On existing employment sites within the development boundaries of Braintree, Witham, Halstead and Great Notley, the six key service villages, Earls Colne Airfield and Sturmer (adjoining Haverhill), which had a total of 32.31ha of permitted and vacant allocated B use class land
- On mixed use regeneration sites in Sible Hedingham and Silver End; and
- On strategic sites. These include the land to the north-west off Panfield Lane in Braintree, where up to 15ha of employment land is provided, and land to the west of the A131 at Great Notley, where an Innovation and Enterprise Business Park will provide up to 18.5ha, part of which is identified for hotel provision use class C1. The Innovation and Enterprise Business Park will provide no more than 40% of the total floor area for B8 use in order to ensure a mix of uses on the site.

The second policy is Policy CS6 concerns retailing and town centre regeneration. It indicates that the three town centres, Braintree, Halstead and Witham, will be the primary location for office provision in the District. Regeneration of the town centres, meeting the identified need for additional retailing and other town centre uses, is focused in the following areas:

- Braintree – land to the east of the Town Hall Centre and land to the west of George Yard Shopping Centre
- Witham – Newlands Shopping Centre and adjoining land; and
- Halstead – the area around The Centre, Weavers Court and to the east of the High Street.

Land to the West of the A131 Great Notley Masterplan (2012)

This document provides a series of indicative plans that set out the broad parameters for development at this site. This document defines the total developable area of the site as 18.5ha, which will include a hotel (C1 use), although it does not determine the location of different uses. The quantum of B8 use on the site is restricted to no more than 40% of total floor area, with no individual unit exceeding 7,500sqm. The masterplan estimates that this site will provide 2,000 additional net jobs for the District, helping to reduce out-commuting through the opportunity to promote and expand local businesses.

Premdor/Rockways Regeneration Site Sible Hedingham Masterplan (2012)

This document provides detail on the regeneration of the former Premdor window and door factory and the Rockways factory. The two sites cover a total of 13.7ha and offer the opportunity to provide land for a new healthcare facility and local employment hub, including flexible meeting spaces, as part of a mixed use development.

North West Braintree Masterplan (2013)

The North West Braintree Masterplan provides more detail on how the strategic requirements within the Growth Location area may be delivered. The development should look to include 15ha of land for business purposes, although this may include land for sports use. Based on an analysis of the commercial property market and past rates of employment land take up, the evidence suggests that the market should require some 3ha to 5ha of land per annum over the Plan period.

Employment proposals for the North West Braintree site are principally focussed on the western half of the site, acting as an extension to the Springwood Industrial area. It is envisaged that this extension would cater for a potential range of businesses, manufacturing, general industrial and distribution uses. In addition, a proposed mixed-use neighbourhood centre towards the centre of the site would provide space for smaller businesses or offices, fitting well within a predominantly residential area.

Draft Site Allocations and Development Management Plan (SADMP) (2014)

The BDC SADMP[18] sets out the designation of employment land that will be carried forward to the new Local Plan. It sets out a series of policies concerning employment land:

- Policy ADM15 defines 23 Employment Policy Areas, where employment uses (B1-B8) will be permitted and retained alongside the display, repair and sale of vehicles, and indoor sports/recreation uses where needs cannot be met within other suitable or viable locations;

- Policy ADM16 lists eight additional sites for Business Uses where only B1 use class will be permitted (see **Table 4-1**). Other land uses will only be permitted at these locations where they are essential and ancilliary to the main use of the unit, and do not occupy more than 5% of floorspace; and

- Policy ADM17 lists two Business and Industrial Uses sites, where only B1 and B2 use class activities will be permitted; and

- Policy ADM18 defines the boundaries of five Employment Policy Areas and one Business Use location, beyond which the spread of industrial and commercial uses will not be permitted.

Employment Land Review (2007)

The Braintree District ELR[3], published in November 2007, estimates that an additional 3ha to 5ha of employment land is needed across the District annually, equating to a requirement of 21ha to 35ha over the planning period.

The ELR finds a total of 1,454,700sqm of B use class floorspace in the District. The majority of employment is focused in Braintree (394,300sqm) and Witham (516,700sqm). Although Witham has fewer employment sites than Braintree, there is a greater tendency for these premises to be large footprint industrial and warehouse units. A high degree of vacancy is also observed in Braintree; at 19.1%, it is almost double the District average. However, this was partly due to new premises at Skyline 120 which had not been occupied at the time of reporting. Of all employment floorspace across

[18] Braintree District Council, (2014); Pre Submission Site Allocations and Development Management Plan (as amended by further changes).

use classes, B uses constitute almost 88%. The most common forms are General Industrial (38%) and Office (35%).

The ELR recommends that an allocation of specific sites should be sufficient for 7 years development at all times. It also recommends that a new business park close to the A120 should be considered, providing for demand generated by this location's proximity to London Stansted Airport and benefitting from the recently duelled A120 between Braintree and the M11. With regard to current or recent employment sites, it recommends that, unless the site or location is unacceptable for modern standards or has a negative impact on adjacent sites, all sites should be retained.

Viability Review of Employment Sites in Braintree District (2012)

The Viability Review of Employment Sites in Braintree[19], published in October 2012, aims to provide the Council with an evidence base to support the Core Strategy objective of providing and retaining employment in sustainable locations and to provide local employment opportunities. This study included an assessment of over 40 sites, considering the inherent quality of each site and its fitness for purpose. It recommended several sites are released from their current employment use, suggesting that the Council should consider its current policy position on the protection of employment sites. Many of the sites released are older employment sites that are unlikely to be viable or attractive to those seeking sites for economic development.

Braintree District Economic Development Prospectus (2013)

The Economic Development Prospectus sets out how Braintree intends to create the conditions for economic growth up to 2026. The document discusses the locational advantage that Braintree holds, benefiting from proximity to regional growth centres such as Cambridge, Chelmsford and Colchester, alongside the international transport hubs of London Stansted Airport and the Haven Ports. It also benefits from a high quality environment where employment land is competitively priced. The Council seeks to enable investment, helping businesses in the District establish and grow. However, the document also discusses a series of barriers to growth that may inhibit growth in the District, such as the need for investment in transport infrastructure and a lack of access to superfast broadband, an important component in fostering micro businesses and SMEs.

Strategic Housing Market Assessment (SHMA) (2014)

The 2014 SHMA[20] develops an understanding of housing market dynamics in the District, assessing the future needs for both market and affordable housing. Due to a strong degree of self-containment in housing movements (74.2%), and with a large proportion of jobs taken up by residents (61.3%), this study defines Braintree as its own 'housing market area'. The SHMA links the outlook for economic and workforce growth to the level of homes necessary to support this and develops an understanding of future demographic trends in considering housing need. The SHMA identifies a range of between 761 to 883 dwellings per year in Braintree District to meet housing need of 824 homes per annum up to 2026. Although this range does not constitute a target itself, it nevertheless demonstrates the need to balance the need for employment land against the increasing demand for land for housing.

[19] Lambert Smith Hampton, (2012); Viability Review of Employment Sites in Braintree on behalf of Braintree District Council.

[20] DCA, (2014); Braintree District Council Strategic Housing Market Assessment Final Report.

Strategic Housing and Land Availability Assessment (SHLAA) (2010)

The Braintree SHLAA[21], published in December 2010, identifies all sites with the potential for housing development. For the purposes of this report, the findings are superseded by the call for sites, which will inform the supply assessment of this report.

Braintree Retail Study Update (2012)

The Retail Study Update[22], published in October 2012, provides an evidence base to inform the changing patterns of retail activity in the District. The study does not recommend any change in the town centre boundary for Braintree or Witham, although it suggests an expansion of Halstead's town centre boundary. The document provides no other recommendations of relevance to this study.

Stansted Sustainable Development Plan (2015)

The Sustainable Development Plan 2015[23] (SDP) was published in 2015 by Manchester Airport Group (MAG) after publishing a draft version of the SDP in 2014 for consultation. The SDP sets out MAG's plan to improve Stansted based upon the following principles:

- Building on positive airline relationships
- World class facilities and service
- Improving our competitive position; and
- Taking a long term view.

The main goal is to expand the capacity of Stansted to 40-45 million passengers per annum (mppa) up from 20mppa currently. The airport has a current planning permission to increase its capacity to 35 mppa, based upon maximising use of the current runway[24]. There is potential for the cargo goods volume at the airport to increase to potentially double its current quantum of around 400,000 tonnes per annum. This scale of growth would have a direct and positive impact on demand for employment land in the wider area. However, growth is constrained by the airport's night noise quota, which limits the total number of movements permitted at night to 7,000 in the summer and 5,000 in the winter.

In relation to employment MAG plan to maintain and retain the general aviation and maintenance facilities on the northern side of the airport. Plans to bring forward 18ha of land for commercial development by later 2015 are prepared and ready to go, depending on planning permission. MAG wants to expand the supply of hotel beds as the current ratio is 35 passengers per hotel bed while other airports such as Heathrow (19 passengers per bed) and Gatwick (16 passengers per bed) have significantly lower ratios. So far MAG has gained permission for a new 329 bedroom hotel to be opened in 2016.

2.5 Employment Policy of Neighbouring Local Authorities

Braintree's economy does not exist in isolation – it is connected, in particular, to its surrounding areas. Neighbouring areas that share similar economic characteristics can be considered to compete for businesses looking to locate into the region. As a

[21] Braintree District Council, (2010); Strategic Housing Land Availability Assessment.

[22] Nathaniel Lichfield & Partners, (2012); Braintree Retail Study Update 2012 Main Report.

[23] Manchester Airports Group (2015); Stansted Sustainable Development Plan

[24] A second runway is proposed at either Gatwick or Heathrow. A decision will be announced by the Davies Commission at some point in May 2015.

consequence, the policy initiatives enacted by adjacent local authorities are likely to have some bearing on the Braintree's industrial and employment property markets.

Table 2-1 below presents a brief summary of the relevant employment policies held by the six neighbouring local authorities.

Table 2-1 Employment Policy of Neighbouring Local Authorities

Local Authority	*Document*	*Policy and Description*
Babergh	Core Strategy and Policies (2014)[25]	Babergh District Council seeks to protect existing sites and allocate additional land in order to provide an additional 9,700 B use class jobs by 2031. New sites will be allocated and protected to provide the space required for job growth including the Babergh Ipswich Fringe, Chilton Woods and Hadleigh. The Council aims to strengthen the rural economy through targeting key sectors such as renewable energy and using building stock intelligently by re-using redundant farm buildings.
Chelmsford	Core Strategy and Development Control Policies Focused Review DPD (Focused Review) (2013)[26]	Chelmsford City Council seeks to maintain high and stable levels of economic and employment growth. The reviewed Core Strategy aims to deliver a minimum of 9,600 new jobs between 2001 and 2021. The Council seeks to retain B use class employment sites while seeking to prevent the long-term vacancy of units where other non-B use classes may be appropriate. Development is encouraged around core employment clusters such as the Anglia Ruskin University Business Innovation Centre and West Hanningfield Road Business Park.
Colchester	Adopted Focused Review of the Core Strategy (2010) and Development Policies (2014)[27]	Colchester Borough Council seeks to promote sustainable development and regeneration by delivering at least 14,200 jobs between 2001 and 2021. It will promote employment generating developments through the regeneration and intensification of existing land, while allocating land elsewhere to support growth. It seeks to promote Colchester as a regional centre by delivering a net additional 40,000sqm of gross office floorspace in the town up to 2021, with an additional 45,100sqm of gross industrial and warehousing floorspace planned within the North Colchester and Stanway Strategic Employment Zones.

25 Babergh District Council, (2014); Local Plan 2011-2031 Core Strategy & Policies.

26 Chelmsford City Council, (Dec. 2013); Core Strategy and Development Control Policies Focused Review DPD (Focused Review).

27 Colchester Borough Council, (2014); Adopted Focused Review of the Core Strategy (2010) and Development Policies (2014).

Local Authority	Document	Policy and Description
Maldon	Pre-submission, Local Development Plan 2014-2029[28]	In 2013 Maldon Council submitted their new Local Development Plan. The Council wishes to support a minimum of 2,000 (net) jobs by 2029. New employment land allocations identified in the document amount to 8.5ha. This is to be provided by development at South Maldon Garden Suburbs and an extension to the Burnham Business Park in Burnham-on-Crouch.
Uttlesford	Uttlesford Local Plan - Pre-Submission Consultation, April 2014[29]	Uttlesford withdrew the Local Plan in December 2014; however, the employment strategy was not found to be un-sound by the inspector[30]. The Council in the Plan aim to deliver 9,200 new jobs between 2011 and 2031. This will be done by expansion of R&D activities at Chesterford Research Park and protecting current employment land uses. The Local Plan stated the need for 38,700sqm of office; 46,400sqm warehouse; and -54,400sqm (a contraction) industrial floorspace by 2031. In regards to Stansted, aviation related development will be supported within the airport boundary.

Source: AECOM's analysis of council policy documents

Table 2-1 provides an indication of the substantial scale of growth and economic development anticipated in the wider area, with neighbouring local authorities collectively seeking to support upwards of 36,900 additional jobs over the long term (the assessment time period end years differ). According to the East of England Forecasting Model[31] (EEFM), discussed in **Section 5**, an additional 77,300 jobs are forecast across Essex up to 2031. The quantum of employment land/floorspace allocated by adjacent local authorities can be a useful pointer and sense check for the demand forecast (**Section 5**) and demand – supply comparison assessment (**Section 6**).

2.6 Conclusions

The NPPF replaced PSSs as of March 2012 with the aim to make the planning system less complex and to promote sustainable growth. The NPPF recognises that the planning system plays an important role in promoting economic growth and building a strong, competitive economy. The PPG offers guidance on employment land reviews and includes the requirement for a call for sites, whereby landowners are asked to put forward sites which could be considered for development. BDC have undertaken a call for sites the responses for which have been considered as part of the ELNA site surveys.

At the regional level Braintree District falls within the South East LEP boundary. The District is part of the A120 Haven Gateway which has been designated by SELEP as an enterprise corridor where much of the employment growth will be generated in the District. Essex County Council's Economic Growth Strategy sets out an economic vision for the county which aims for Essex to continue to specialise in growth sectors such as advanced manufacturing, low carbon technologies and logistics. Within the sub-region

[28] Maldon District Council (2013); Local Development Plan, Pre-submission.

[29] Uttlesford Council (2014); Uttlesford Local Plan - Pre-Submission Consultation, April 2014.

[30] Uttlesford Council (2014); Examination of the Uttlesford Local Plan (ULP).

[31] Oxford Economics, (2015); East of England Forecasting Model. For further information on how these forecasts are derived see:
http://www.cambridgeshireinsight.org.uk/EEFM

policy documents of local authority areas adjacent to BDC area suggest, collectively, there is an aspiration for upwards of 36,900 additional jobs.

For Braintree District, growth is heavily influenced by the District's proximity to London, regional growth centres and strategic transport networks. BDC's Core Strategy seeks to retain employment uses on existing employment sites, mixed use regeneration sites and two strategic sites located to the north-west of Panfield Lane in Braintree and to the west of the A131 at Great Notley. Master plans have been prepared for Greater Notley, Premdor/Rockways Regeneration Site and North West Braintree which will include employment land to help meet any future demand. The Braintree District Economic Development Prospectus[32] identifies that employment land in Braintree is competitively priced, but there are some barriers to growth such as the need for investment in traffic infrastructure which could improve the District's economic attractiveness (through for example affecting journey times and reliability which is particularly important for distribution activities and just in time supply chain activities) and consequently the marketability of sites for employment uses.

[32] Braintree District Council, (2013); Braintree District Economic Development Prospectus 2013/2026

3 THE LOCAL ECONOMY

3.1 Introduction

This section profiles Braintree District's economy. The analysis informs an understanding of the economy's strengths and weaknesses and the implications for future employment land and premises. Key measures profiled include:

- Population, including the working population, and skill and occupational profiles of residents
- Commuting patterns and the location of work; and
- Resident employment by industry sector and location quotients.

These measures help to shed light on the following three questions:

1. What are the characteristics of the local labour force, how well off are working residents, and what are the implications for employment land provision?
2. What are the commuting flows in and out of the District, what methods of transport are most prevalent, and what are the patterns of home working?
3. What are the typical occupations held by residents, what are the industrial activities which the District has comparative strengths in and how has this changed over time?

The analysis draws upon the most recent statistics available at the time, complemented with the context provided by the Braintree District Economic Development Prospectus[33] and, where appropriate, includes benchmarks against Essex and England to allow comparisons.

3.2 Population and Labour Market Structure

Population

The needs of the local economy will be driven in part by population. Between 2001 and 2011 Braintree's population increased by 11.3% to over 147,000[34]. The growth rate is somewhat higher than across Essex and England as a whole (6.3% and 7.8% respectively).

ONS analysis suggests that an additional 19,700 residents are projected to reside in the District between 2015 to 2033[35]. This represents an increase in population size of 14.6% over the period, greater than that anticipated for Essex (14.4%). Braintree District's population is more rural than elsewhere in Essex, with 38.3% living in rural areas as opposed to 25.9% across the county and 17.6% nationally[34]. The growth in resident population is reflected in the need for additional housing as set out in the 2014 SHMA.

In 2013, 79.5% of the working age population was economically active, which is slightly less than that observed within Essex (80.2%) but higher than England (77.6%). In 2013 the unemployment rate was 6.7%, broadly in line with that recorded within Essex (6.5%) and slightly lower than across England (7.6%).

[33] Braintree District Council, (2013); Braintree District Economic Development Prospectus 2013/2026

[34] ONS Census 2001 and 2011

[35] ONS Sub-National Population Projections 2012

Resident Qualifications

In 2013 approximately 90.3% of working age residents within Braintree District had a qualification, broadly in line with Essex (91.5%) and England (90.9%). However, the proportion of residents holding qualifications above NVQ1 are below the Essex and national averages and only a quarter of working age residents had a degree or higher degree (NVQ4+) – a lower rate than the Essex and England averages (28.3% and 35% respectively). This is shown in **Table 3-1** below.

Table 3-1 Educational Attainment of Braintree District's Residents

	Braintree (%)	*Essex (%)*	*England (%)*
% with NVQ4+	25.5	28.3	35.0
% with NVQ3+	48.0	48.9	55.6
% with NVQ2+	68.5	70.0	72.5
% with NVQ1+	84.6	86.0	84.6
% with other qualifications (NVQ)	5.7	5.5	6.3
% with no qualifications (NVQ)	9.7	8.5	9.1

Source: ONS Annual Population Survey (2013)

However, Census data (2011) suggests there is a skills gap for young residents in the District. Young people are more likely to not have achieved NVQ1[36] level qualifications (36.2%) than both Essex and England averages (33.5% and 31.2% respectively), while the proportion educated to degree level (NVQ4+) is over four percentage points lower than the England average. The Braintree District Economic Development Prospectus (2013)[33] seeks to improve attainment levels for 16-24 year olds, working with businesses to identify their skill needs while promoting and supporting apprenticeships. **Table 3-2** presents this breakdown by qualification below.

Table 3-2 Educational Attainment of 16-24 Year Olds[37]

	Braintree (%)	*Essex (%)*	*England (%)*
% with NVQ4+ only	9.5	11.1	13.7
% with NVQ3+ only	19.8	21.8	25.9
% with NVQ2+ only	3.4	2.9	2.6
% with NVQ1+ only	31.2	30.7	26.5
% with other qualifications (NVQ) only	24.3	22.7	20.8
% with no qualifications (NVQ)	11.9	10.8	10.4

Source: ONS Census (2011)

Earnings by Resident and Workers

In 2014 the average (median) gross weekly earnings for residents within the District was £575 approximately £16 higher than levels recorded within Essex and £52 higher than recorded across England as a whole. Residents earned on average £575 per week, £81 (16%) more per week than workers in the District on average (£494), suggesting that residents commuting out of the District to work are travelling to higher-skilled, higher-paid jobs (commuting patterns are discussed further in **Section 3.3**).

[36] Equivalent to one GCSE (any grade).

[37] Qualification groupings

Table 3-3 Resident and Workplace Median Weekly Wages

	Resident (£ per week)	*Workplace (£ per week)*
Braintree	575.3	494.3
Essex	559.1	500.2
England	523.6	523.3

Source: ONS Annual Survey of Hours and Earnings (2014)

3.3 Commuting Patterns and Location of Work

The location of work is an important factor in analysing the extent to which the employment opportunities within Braintree District fulfil the economic needs of its residents.

Commuting Patterns

Analysis of Census data provides a comparison of the magnitude and location of travel both in and out of the District for work. **Table 3-4** presents a breakdown of the District's workforce by place of residence, while **Table 3-5** presents a breakdown of the District's residents' place of work.

Table 3-4 Place of Residence of Braintree District's Workforce

	Number	*Percentage*
Braintree	26,964	63.9
Colchester	3,617	8.6
Chelmsford	2,634	6.2
Maldon	1,339	3.2
Babergh	1,142	2.7
Uttlesford	886	2.1

Source: ONS Census (2011)

Table 3-4 shows that the majority of individuals employed in Braintree District also reside there. The location of in-commuters also gives an indication towards the local focus of Braintree's economy, with each of the five largest sources of workers coming from neighbouring local authorities.

Table 3-5 Place of Work of Braintree District's Residents

	Number	*Percentage*
Braintree	26,964	36.2
London	6,880	9.2
Chelmsford	6,854	9.2
Uttlesford	3,830	5.1
Colchester	3,665	4.9
Maldon	1,363	1.8

Source: ONS Census (2011)

Table 3-5 shows that, of all residents in employment, over a third (36.2%) also work in the District. Although around a third of residents both live and work in the District, a greater number travel to other areas to work. One cause of this may be the wage differential highlighted in **Table 3-3**. Residents may have a greater propensity to commute into other areas for work, where earnings tend to be relatively higher, than remain in the District. Alternatively, it may be the case that a low number of jobs in Braintree District itself forces residents to seek work elsewhere. As those working and living in the District equate to a third of working residents but two-thirds of the workforce, this indicates that there are approximately two working residents for every job in the

District. Comparing this finding with that of the skills gap identified for Braintree residents (see **Table 3-2**), this evidence suggests, with the introduction of an appropriate package of skills, training and employment initiatives that an opportunity exists to improve the skills of the local population whilst retaining a large proportion of residents as part of the local workforce.

In terms of the destinations for out-commuting, the largest proportion of residents leaving the District commute to London (6,880, 9.2% of employed residents). In addition, there is a large outflow of employees to other locations in Essex, such as Chelmsford (6,854, 9.2% of employed residents) and Colchester (3,830, 4.9% of employed residents).

This analysis provides an indication of the important role of London Stansted Airport in supporting the economic needs of Braintree residents. Whereas there is a relatively low influx of workers from Uttlesford (886, 1.8% of the District's workforce), where the airport is located, many residents commute to this area (3,830, 5.1% of employed residents). The airport plays a significant role in not only employing residents of the District, but through the indirect economic benefits associated with proximity with such a large employment hub, generating and supporting employment in other districts through supply chain linkages.

This analysis indicates that out-commuting from the District is generally to the east (to Colchester), west (to London Stansted Airport), and most predominantly to the south (to Chelmsford and London). By contrast, there is little crossover to the north of the District. The small proportion of workers commuting in to Braintree District from other local authorities for work is driven by the relatively small quantity of economic activity to the north of the District. However, the small proportion of residents commuting out to nearby areas such as Haverhill (in St Edmundsbury) and Cambridge suggest that linkages to the north form a small influence on the District's economy.

Method of Travel

Census data also provides a breakdown of the method of transport used by commuters, both residing and working in Braintree District. **Table 3-6** demonstrates the transport methods used by the District's residents and workforce relative to the Great Britain average.

Table 3-6 Method of Travel to Work

	Braintree Residents (%)	***Braintree Workforce (%)***	***Great Britain (%)***
Underground, metro, light rail or tram	0.3	0.2	3.7
Train	9.9	2.0	5.5
Bus, minibus or coach	2.6	3.3	8.7
Taxi	0.3	0.4	0.4
Motorcycle, scooter or moped	0.7	0.8	0.8
Driving a car or van	68.3	69.8	60.1
Passenger in a car or van	5.2	6.5	5.6
Bicycle	1.7	2.4	3.1
On foot	10.7	14.5	11.7
Other method of travel to work	0.2	0.3	0.3

Source: ONS Census (2011)

It shows that use of a van or car to travel to work is substantially more prevalent for both Braintree District's residents and workforce than the national average; respectively 8.2 and 9.7 percentage points higher. This demonstrates that issues surrounding mobility, such as strategic road access and road capacity, are important concerns in this area.

Home Working

Alongside commuting trends, the role of home working plays a significant role in the local economy. In 2011, 8,664 individuals worked from home (11.6% of those in employment). Although this represents a larger proportion than those commuting to any other location, it is broadly in line with the national average (10.5%). Comparison between Census data between 2001 and 2011 indicates that recent trends in home working have remained relatively constant, with home working increasing by only 1.8% over the ten year period.

3.4 Business and Employment Structure

Business Demography

VAT registration and deregistration rates provide an indication of the entrepreneurial characteristics of the District. On balance over the course of a year the net gain in registrations in Braintree District was broadly in line with Essex. Published data indicates that in 2012 there were 690 registrations and 630 de-registrations, resulting in a net gain in the District's business stock of 60, or 1%[38].

The latest known business registrations data is from the ONS which records 6,025 VAT or PAYE-based enterprises in Braintree District in 2014[39].Small and micro businesses contribute significantly to employment within Braintree District, with 5,355 of the 6,025 companies (88.9%) employing up to nine employees (typically termed micro businesses), in line with the Essex average.

Occupational Analysis

We can develop an understanding of the typical jobs taken up by residents of Braintree District through analysing the evidence of employment share by occupation.

Table 3-7 Occupational Structure of Braintree District's Residents

	Braintree (%)	*Essex (%)*	*England (%)*
Managers, directors & senior officials	15.9	12.1	10.4
Professional occupations	16.5	18.9	19.8
Associate professional & technical occupations	9.1	13.7	14.2
Administrative & secretarial occupations	9.5	12.0	10.7
Skilled trades occupations	12.0	11.5	10.5
Caring, leisure & other service occupations	5.3	8.7	9.0
Sales and customer service occupations	5.6	6.6	7.8
Process, plant & machine operatives	8.2	6.7	6.2
Elementary occupations	17.9	9.0	10.6

Source: ONS Annual Population Survey (2013)

A smaller proportion of Braintree District's residents are employed in professional, administrative and secretarial occupations than across both Essex and England. These occupations are typically associated with business activities which require office premises. The exception to this trend is the managers, directors and senior official occupation, which has a relatively greater share that equates to almost a sixth of the resident population.

By contrast, 38.1% of the resident population is employed in skilled trades, machine operatives and elementary occupations; somewhat greater than across Essex (27.2%)

[38] ONS, (2012); Births and Deaths of Enterprises as a Percentage of Enterprise Stock

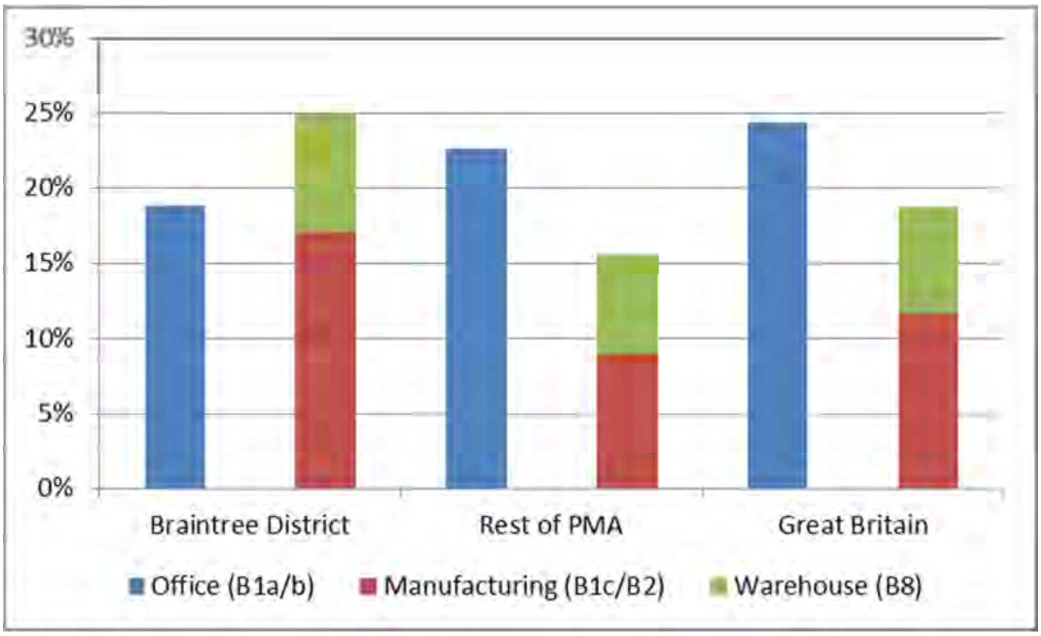
[39] ONS, (2014); UK Business Count: Activity, Size and Location

and England (27.3%). These occupations are typically associated with business activities which require industrial premises.

Employment by Use Class

We can develop an understanding of the importance of each B use class to the District's economy by investigating the share of employment by those business activities sectors which broadly map to office, manufacturing and warehousing uses. **Figure 3-1** presents the proportion of employment by use class in 2013, the latest available data.

Figure 3-1 Employment by Use Class 2013



Source: ONS Business Register and Employment Survey (2014); AECOM calculations. Note: Employment supported by other activities such as retail is not expressed in this chart.

Figure 3-1 shows that although more residents of the District are employed in office occupations than either manufacturing or warehousing, together the latter two occupations contribute a larger share of employment. Although office contributes the largest number of employees in the District, it represents a smaller share of total employment than across the rest of the PMA and Great Britain. By contrast, the share of employment on activities associated with manufacturing premises is almost 50% greater the national average. Approximately 44% of total employment in the District is within the B use class, higher than across the rest of the PMA (38%).

Location Quotient

A location quotient measures the relative size of an industrial sector relative to the national economy, providing a sectoral analysis of Braintree District's employment structure. A location quotient greater than 1.0 indicates that the rate of employment in that sector is above the national average, whereas a location quotient smaller than 1.0 indicates it is below the national average. A high location quotient (i.e. above 1.0) indicates some degree of specialisation, and the higher the location quotient the greater the specialisation. Industry sectors with high location quotients often indicate those sectors where the local economy has a comparative advantage and thus attract investment.

Table 3-8 presents the location quotient for each broad industrial sector in Braintree District relative to England. The table also includes data on the percentage change in employment over the period from 2009 to 2013, the latest available data, and the relative share of employment of a sector. This helps to identify those sectors in which BDC is relatively well represented, growing and of importance to the local economy in terms of jobs.

Table 3-8 Braintree District location quotients. England= 1.0 (2013)

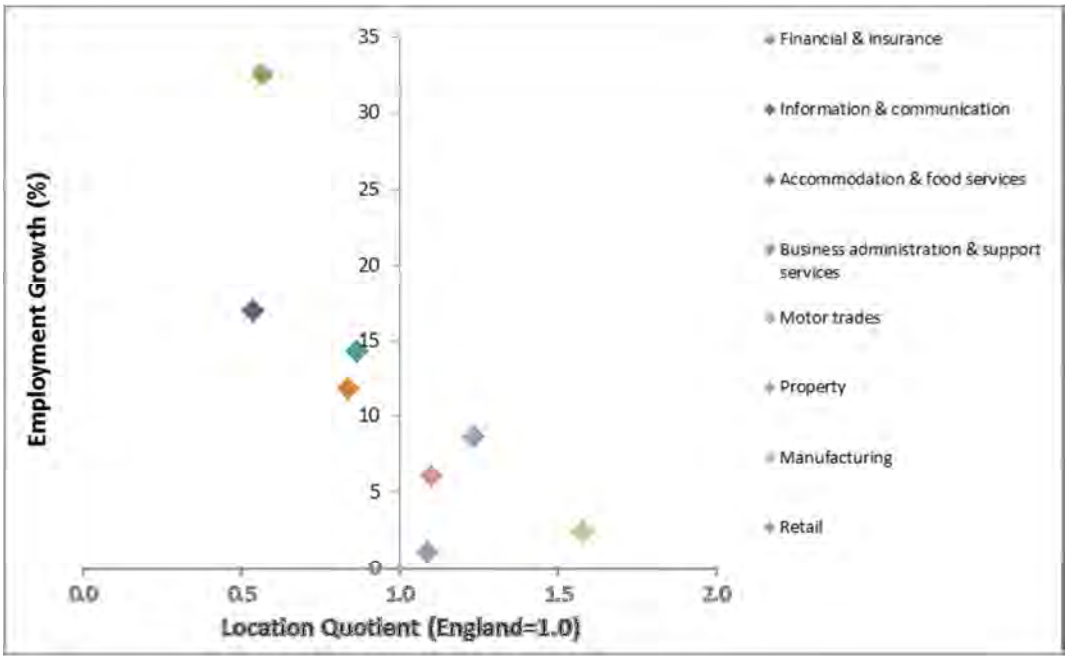
Sector	***Location Quotient***	***Employment Change 2009-2013 (%)***	***Employment Share 2013 (%)***
Construction	1.7	-20.5	7.0
Manufacturing	1.6	2.4	13.3
Wholesale	1.3	-4.1	5.5
Motor trades	1.2	8.6	2.1
Mining, quarrying & utilities	1.2	77.3*	1.4
Education	1.1	-1.4	10.9
Property	1.1	6.0	1.9
Retail	1.1	1.1	10.9
Transport & storage	0.9	-14.5	4.1
Arts, entertainment, recreation	0.9	-18.1	4.0
Accommodation & food services	0.9	14.3	6.0
Business administration & support services	0.8	11.8	7.2
Public administration & defence	0.8	-6.2	3.8
Health	0.8	-1.6	10.6
Professional, scientific & technical	0.8	-0.9	6.6
Financial & insurance	0.6	32.6	2.1
Information & communication	0.5	16.9	2.3
Agriculture, forestry & fishing	0.4	93.9*	0.3

Source: ONS Business Register and Employment Survey (2014)
Note: Grey shade indicate:
1) LQ higher than 1.0 i.e. proportionately well represented
2) Employment growth in the sector during the period 2009 and 2013
3) A comparatively important sector in BDC area supporting more than one tenth of all jobs in the District.
** Those sectors which have seen a large percentage change (such as mining, quarrying & utilities) are likely to have a small employment base.*

Table 3-8 demonstrates that Braintree District's employment is relatively focused on industrial-type sectors. The construction and manufacturing sectors alone account for over a fifth of employment. The 2008 economic downturn and the consequential decline in capital investment is the likely driving factor behind the strong contraction in employment during 2009 and 2013. Construction employment is numerically flexible though, with employment following demand, and it is likely that employment in this sector will rebound as the construction market continues to strengthen through 2015.

This analysis allows us to consider not only those sectors that are highly represented, but also provides an indication of those that are growing and have the potential to support future growth of the Braintree economy. **Figure 3-2** presents the sectors that have seen an increase in employment from 2009-2013, and their respective location quotients.

Figure 3-2 Sectors in Braintree District which have had Positive Growth 2009-2013



Source: ONS Business Register and Employment Survey (2014). Note: this analysis only includes sectors that contribute >2% of employment in Braintree District.

The financial & insurance sector, where Braintree District traditionally has a relatively small proportion of employment, has seen strong employment growth over the period covered. Anecdotal evidence supports the view that this may be a growth sector in the area. A number of financial services have recently relocated back office functions into the District in areas such as Witham, away from more traditionally strong office market at Chelmsford. Positive employment growth in this sector, alongside that observed in business administration & support services and information & communication, imply an increasing need for office employment spaces in the District. Supporting and encouraging growth of the sectors which are relatively underrepresented (LQ under 1.0) but have experienced positive employment change could lead to an increase in the number of jobs available to local residents.

Although not a typical occupier of employment land, the retail sector nevertheless plays an important role in the local economy. It is the second largest sector by employment, and plays an important role in sustaining the District's three key town centres. The Economic Development Prospectus[33] discusses a desire to support independent retailers as a means of promoting regeneration of town centres in the District (discussed in more depth in in **Section 2**). Supporting and promoting the retail offer not only to support jobs directly, but creates a more viable location to attract other employment activities, such as offices and services, which will help to stimulate growth.

3.5 Summary

This section has considered the local economy's strengths and weaknesses, drawing upon published data sources to draw out recent demographic and economic trends. The findings of this section will be drawn upon to inform discussion of how the District may better position itself to achieve growth discussed in more detail in Section 0.

The key findings of this analysis are presented below, structured around the three questions posed at the start of this section:

1. What are the characteristics of the local labour force, how well off are working residents, and what are the implications for employment land provision?

    - An average number of residents hold some form of qualification, although fewer are qualified to degree level than across Essex and nationally;

- A skills gap may exist for young residents (aged 16-24), who are less likely to hold any form of qualification or be qualified to degree level. A continuation of this skills gap may result in many residents relying on employment in low-skilled occupations, typically located on manufacturing (B1c/B2) land; and

- A typical resident has a higher income than across Essex and England, while in contrast those who work in the District earn relatively less on average.

2. What are the commuting flows in and out of the District, what methods of transport are most prevalent, and what are the patterns of home working?

   - Braintree District has a poor rate of self-containment: more residents leave the District to work elsewhere than are retained as part of the workforce population. Common destinations for out-commuters include other key employment sites in Essex, such as Chelmsford, Colchester and London Stansted Airport, while the largest export of workers is to London;

   - Approximately two-thirds of jobs in the District are taken up by local residents. The workforce population is generally supplemented by employees commuting in from neighbouring local authorities' areas;

   - Use of a van or car to travel to work is more prevalent than the national average for both the resident and workforce population; and

   - Although home working represents the second largest destination for residents (after working in Braintree), this trend has stayed relatively constant over the previous decade, and is at a level broadly in line with the national average. Any growth in the rate of home working may imply a greater need for small, flexible office space.

3. What are the typical occupations held by residents, what are the industrial activities which the District has comparative strengths in and how has this changed over time?

   - More employment is associated with office premises than manufacturing or warehousing, although the share of office employment is well below Essex and England averages. Despite this, many traditional office-based sectors, such as finance & insurance, have experienced strong recent growth;

   - A smaller proportion of residents are employed in professional, administrative and secretarial occupations than Essex and England averages;

   - By contrast, a relatively large proportion of residents work in skilled trades, as machine operatives or in elementary occupations. A far greater share of employment is associated with manufacturing premises than the national average, implying that a relatively large proportion of jobs are supported by activities on industrial land; and

   - The propensity for residents to hold industrial-type occupations is further reflected in its relative strength in construction, manufacturing and wholesale sectors. However, the extent to which this will continue is brought into question by a recent contraction in employment within the construction and wholesale sectors.

4 SUPPLY OF EMPLOYMENT LAND

4.1 Introduction

This section provides a summary of the key findings of the field survey and desk research and identifies the suitability of land and premises in Braintree District for employment uses (office, B1a/b; industry, B1c/B2; and warehousing, B8). The results are summarised to provide an overview of conditions of employment clusters and development sites and the typology of employment premises.

4.2 Identifying Employment Land Clusters for Survey

The survey methodology and criteria are based on factors and issues set out in the PPG (2014) and the NPPF (2012). Our site survey assessed the characteristics of land and premises to determine their suitability for office and B8 industrial land uses.

The list of employment clusters included in this assessment were selected and agreed in consultation with the Council and consisted of reviewing:

1. Employment Policy Areas and Business Use Areas, as defined by the Pre Submission Site Allocations[40]
2. Non-designated sites currently support B-use class employment and measuring over 0.25ha in size, as per PPG paragraph 11, and considered suitable for survey
3. Strategic sites at Great Notley and Braintree, as defined by the Core Strategy[41]
4. Mixed use regeneration sites in Sible Hedingham and Silver End, as defined by the Core Strategy
5. Sites identified for employment use as part of the call for sites process, undertaken by the Council from August to October 2014, not captured under points 1 to 4 above; and

Following from the five sources above:

Under point 1, the Pre-Submission Site Allocations document identified 30 Employment Policy Areas and Business Uses[42]. Where sites were in close proximity and shared similar characteristics they were aggregated in to clusters. This process led to 28 clusters being identified for survey. During the survey, a number of clusters were considered to contain distinct areas of character and/or contained natural geographic divisions, created for instance by transport infrastructure (rail lines or main roads). For these clusters it was considered appropriate to survey the distinct sub-areas of clusters separately. The clusters comprise mostly employment land uses such as office, industrial and warehousing, and wider industrial uses (utilities, transport functions and waste management) but also include residential, retail, leisure and community uses, which may lie within the cluster boundaries. Designated clusters measure 305.4ha in total.

Regarding point 2, discussions were held with the Council to identify any employment land clusters comprising more than 0.25ha of land. Only one non-designated site measuring 6.9ha was identified.

Designated and non-designated clusters are listed in **Table 4.1**. In total these clusters measure 312.3ha.

[40] Braintree District Council, (2014); Pre Submission Site Allocations and Development Management Plan.

[41] Braintree District Council (2011); Core Strategy, Adopted 2011; and associated masterplans (2012)

[42] Hereafter referred to as ‘Employment Policy Areas’.

For points 3 and 4 above, a total of five Strategic sites, Mixed-use regeneration sites and non-designated suitable employment sites were identified, as listed in **Table 4.14**. These sites measure 105ha in size, though not all of this land would be used for B-use class employment. These sites do not currently function as industrial or office estates and so their suitability to accommodate employment uses is assessed differently to designated Employment Policy Areas. An overview of their suitability is set out in **Section 4.13**.

Under point 5, the call for sites generated a response of 329 sites, the majority of which were proposed for residential development. 59 were put forward for employment or mixed use development with the potential for B-use employment provision. These sites were mostly vacant fields of agricultural land and as such their suitability for employment use was surveyed differently to those clusters already functioning as employment locations. We surveyed 27 of these sites, including those that are adjacent or in close proximity to existing employment uses, or are large in scale. These sites constitute 1,006ha of the total 1,321ha[43] area covered by all 59 proposed employment or mixed use development sites. We present and analyse these clusters in **Section 4.13**.

Our long list of clusters to survey of employment land clusters therefore fell into two parts: first, a survey of clusters which were defined as Employment Policy Areas, non-designated sites over 0.25ha, Strategic sites or Mixed use regeneration sites; and second, sites from the call for sites process with land proposed for employment use, amounting to more than 0.25ha.

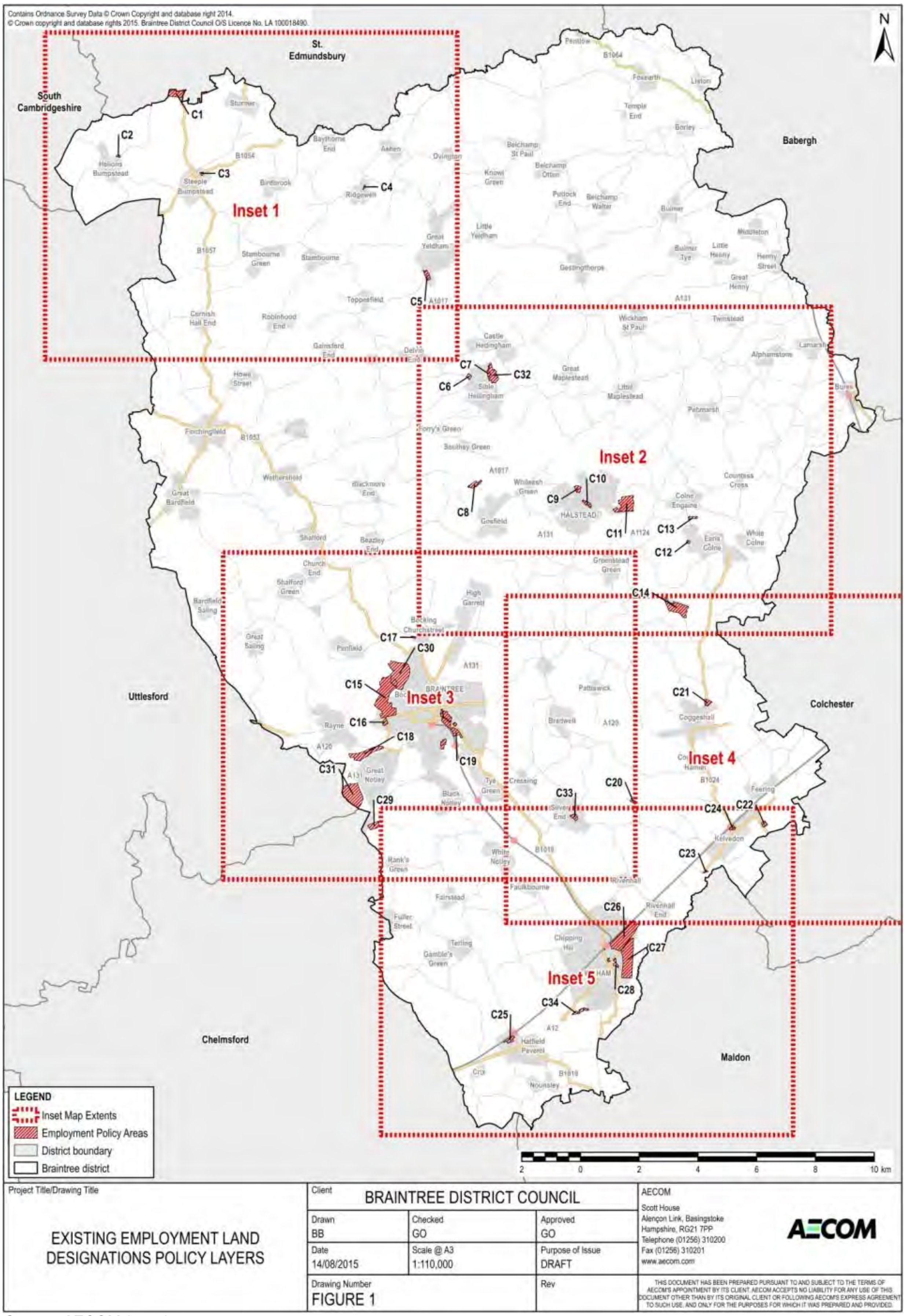
Each cluster / site was visited and appraised against an agreed set of economic, planning and property market criteria, in line with PPG, to determine its suitability for continued use as employment land. It should be noted that the clusters have been assessed as a whole, rather than at an individual building-by-building level, and hence the results of this survey provide a subjective assessment of the overall performance of the cluster.

An overview of the survey results for Employment Policy Areas are detailed in **Sections 4.3** to **4.9** of this chapter, with site specific details set out in **Appendix A**. An assessment overview of the suitability of Strategic sites and Mixed-use sites regeneration, and call for sites to accommodate B-use class business activities is set out in **Section 4.13**.

All clusters surveyed are set out in **Figure 4-1** to **Figure 4-6** while a full list of cluster names, policy designations and site areas is provided by **Table 4-1**.

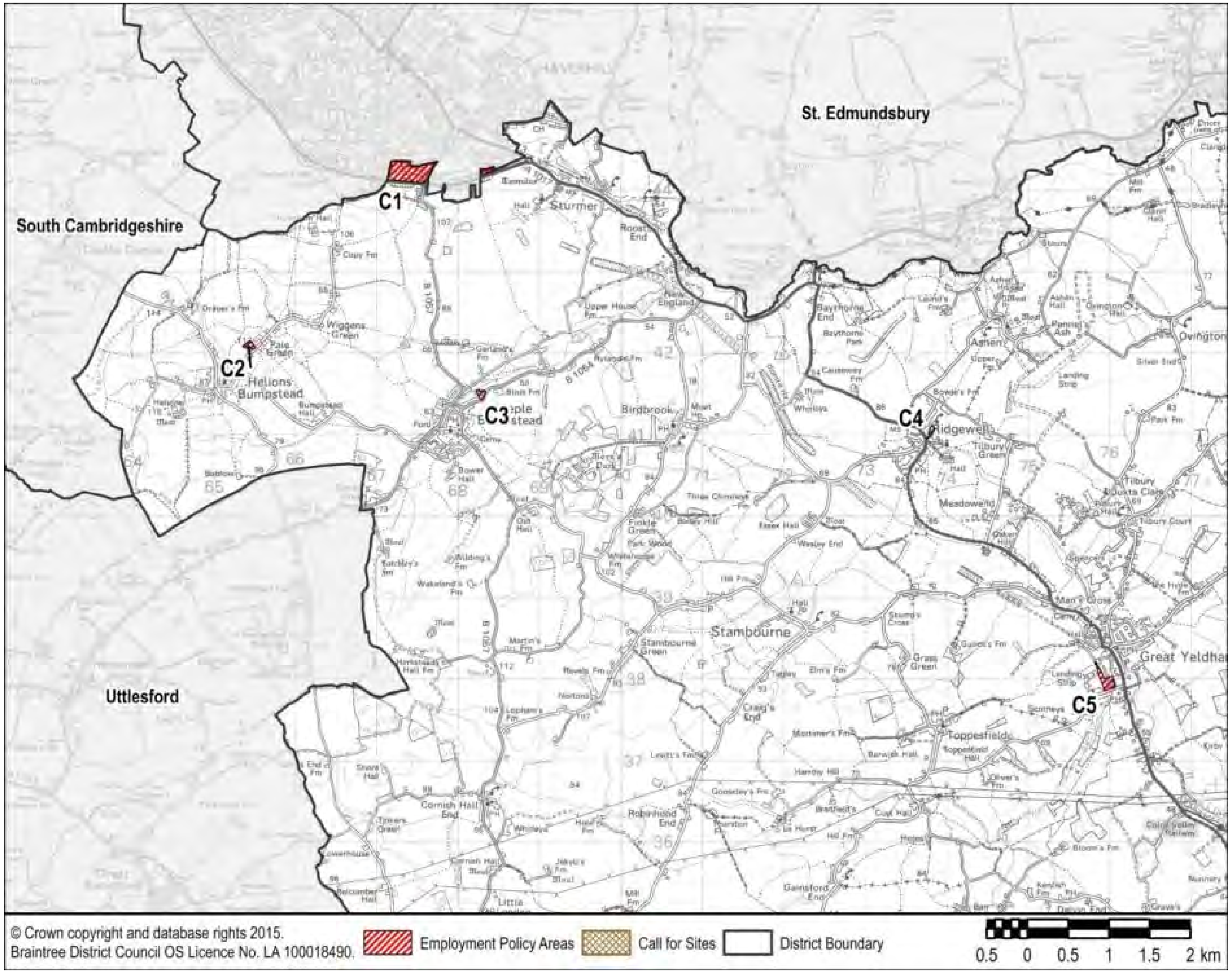
[43] In some cases there was an overlap between the Employment Policy Areas, the boundaries of which are defined by land use, and call for sites locations, defined by land use. This calculation considers the total area outside of that defined as an Employment Policy Area to remove double-counting.

Figure 4-1 Context Map of Surveyed Employment Clusters in Braintree District



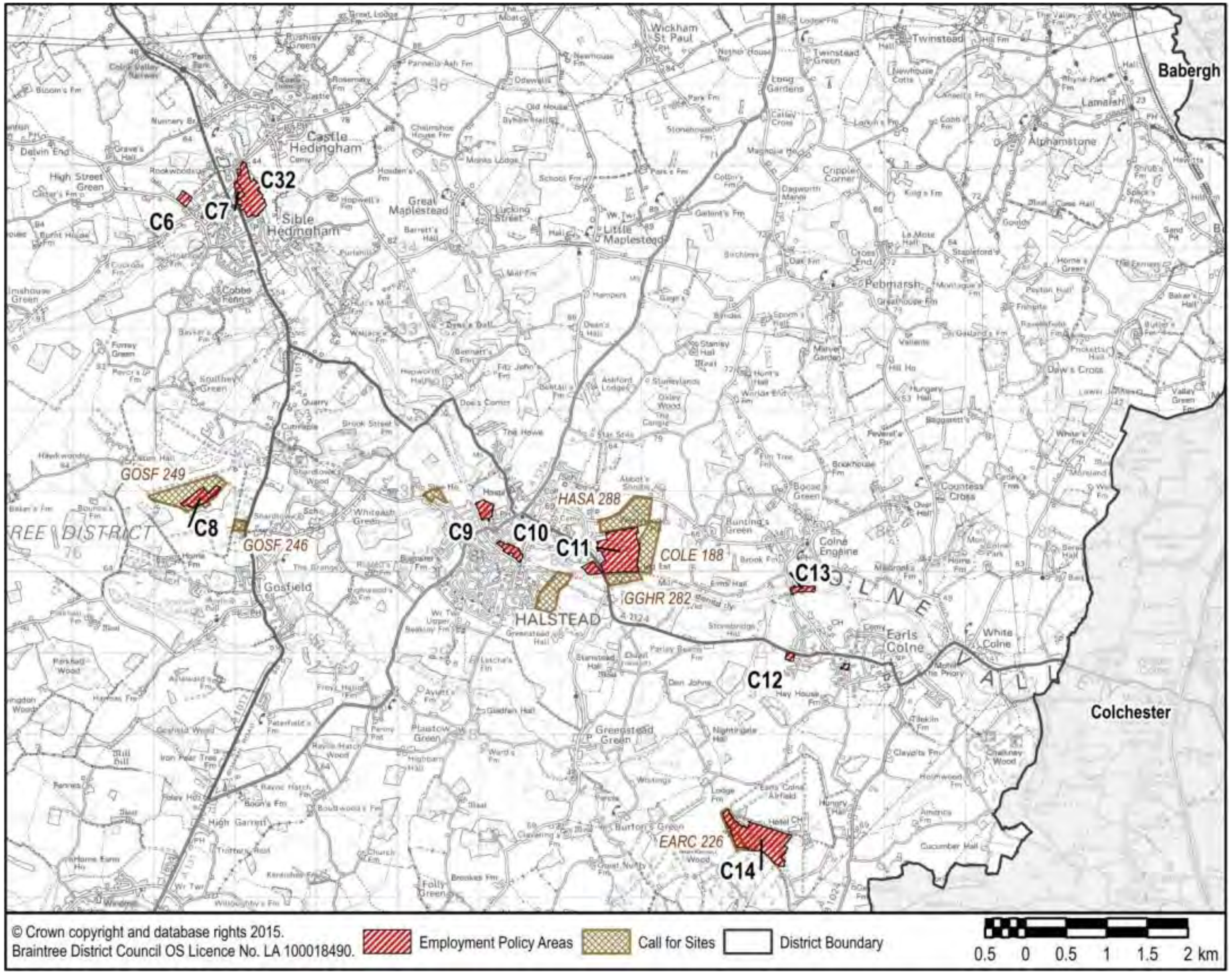
Source: AECOM (2015)

Figure 4-2 Context Map Inset 1: North West of District



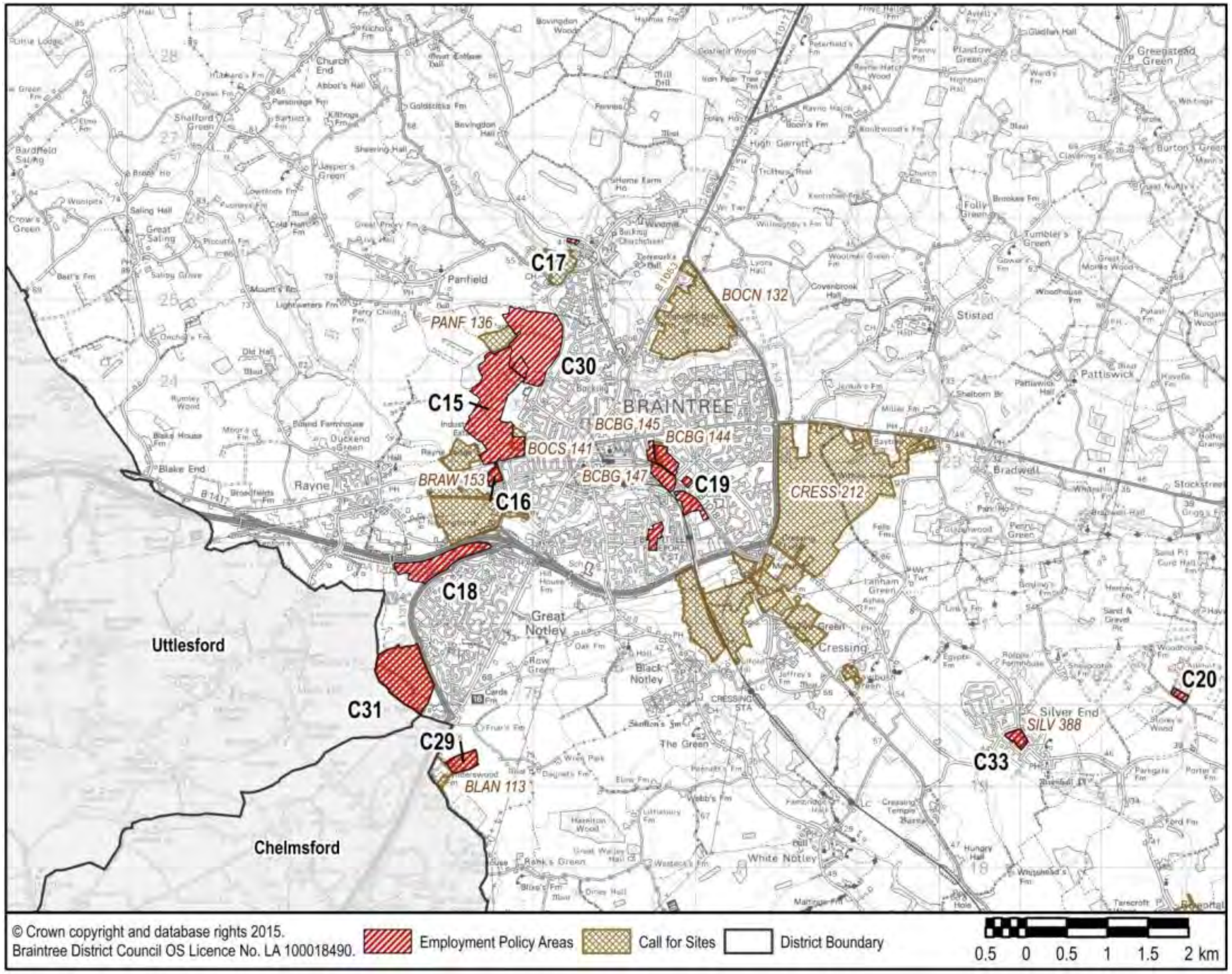
Source: AECOM (2015). Labels included for all Employment Clusters and call for sites locations surveyed.

Figure 4-3 Context Map Inset 2: Central East, Sible Hedginham, Halstead and Surrounding Area



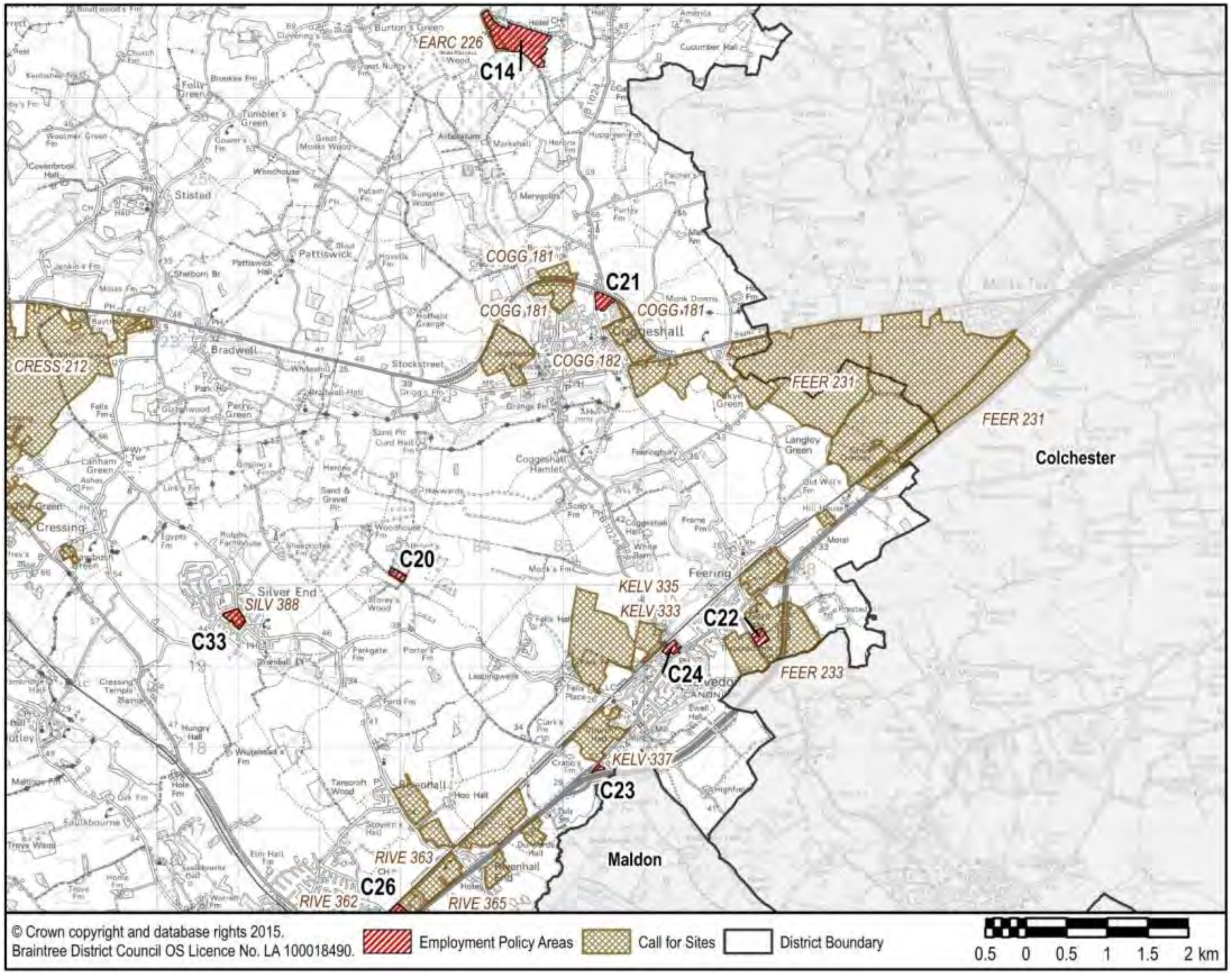
Source: AECOM (2015). Labels included for all Employment Clusters and call for sites locations surveyed.

Figure 4-4 Context Map Inset 3: Central West, Braintree and Surrounding Area



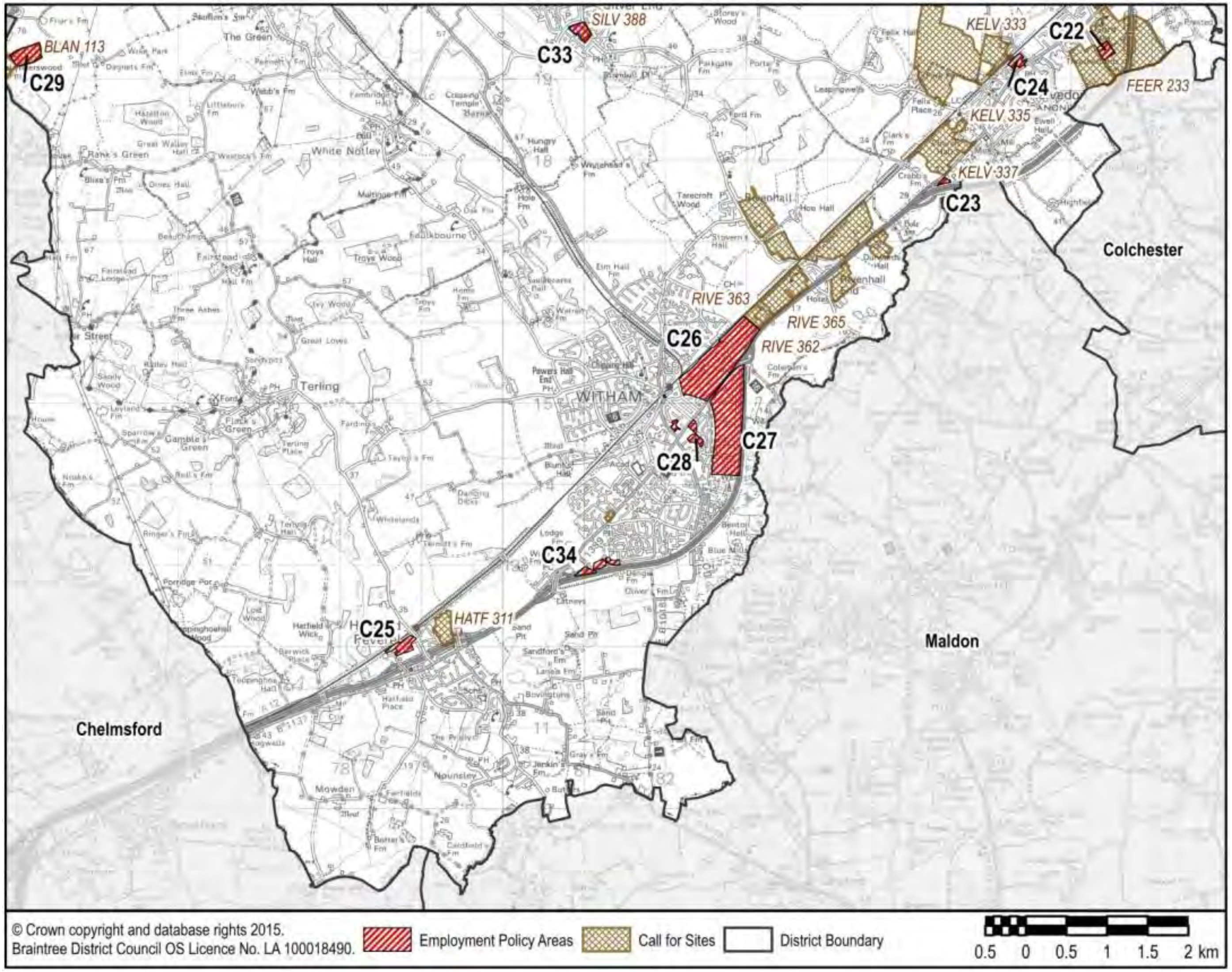
Source: AECOM (2015). Labels included for all Employment Clusters and call for sites locations surveyed.

Figure 4-5 Context Map Inset 4: Coggeshall and South East of District



Source: AECOM (2015). Labels included for all Employment Clusters and call for sites locations surveyed.

Figure 4-6 Context Map Inset 5: South of District



Source: AECOM (2015). Labels included for all Employment Clusters and call for sites locations surveyed.

Table 4-1 Designated and Non-designated Clusters

Cluster	*Employment Area / Cluster Name*	*BDC Policy Designation*	*Use Class*	*Area (ha)*
C1	Sturmer Industrial Areas	Employment Policy Area	B8	12.3
C2	Slate Hall Farm, Helions Bumpstead	Employment Policy Area	Farm property	0.9
C3	Blois Meadow Business Centre	Business Uses	B1a/b	0.9
C4	Greenfield Creations, Ridgewell	Employment Policy Area	B8	0.6
C5	Hunnable Industrial Estate, Great Yeldham	Employment Policy Area	B1c/B2	4.7
C6	Former Tanner's Dairy, Oxford Lane, Sible Hedingham	Employment Policy Area	B1a/b, B1c/B2	2.0
C7	Rippers Court, Sible Hedingham	Employment Policy Area	B1c/B2, B8	2.3
C8	Gosfield Airfield	Employment Policy Area	B1c/B2, B8	5.7
C9	Broton Drive Industrial Area, Halstead	Employment Policy Area	B1a/b, B1c/B2	3.7
C10	Halstead Town Centre South	Employment Policy Area	B1c/B2	4.0
C11	Bluebridge Industrial Estate	Employment Policy Area	B1c/B2, B8	25.3
C12	Atlas Works, Earls Colne	Employment Policy Area	B1a/b	1.5
C13	Riverside Business Park, Earls Colne	Employment Policy Area	B1c/B2, B8	2.2
C14	Earls Colne Airfield	Employment Policy Area	B1c/B2, B8	23.9
C15	Springwood Industrial Estate	Employment Policy Area	B1a/b, B1c/B2, B8	63.3
C16	Broomhills Industrial Estate	Employment Policy Area	B1c/B2	2.9
C17	Bovingdon Road, Bocking Churchstreet	Employment Policy Area	B8	0.7
C18	Skyline 120	Employment Policy Area	B1a/b, B8	20.7
C19	Braintree Town	Employment Policy Area	B1a/b, B1c/B2, B8	25.3
C20	Former Polish Campsite	Employment Policy Area	B8	1.7
C21	Coggeshall Industrial Area	Employment Policy Area	B1c/B2, B8	3.7
C22	Threshelfords Business Park, Feering	Business Uses	B1a/b	2.7
C23	London Road, Kelvedon	Employment Policy Area	B1a/b, B8	0.8
C24	Kelvedon Railway Station	Employment Policy Area	B2	2.2
C25	Arla Factory, Hatfield Peverel	Employment Policy Area	B1c/B2, B8	4.2
C26	Eastways, Witham Industrial Estate	Employment Policy Area	B1c/B2, B8	41.3
C27	Freebournes, Witham Industrial Estate	Employment Policy Area	B1c/B2, B8	42.5
C28	Witham Town Centre	Business Uses	B1a/b	3.5
C29	Lynderswood Farm	Not designated	B1a/c, B2,B8	6.9
Total	**-**	**-**	**-**	**312.3ha**

Source: AECOM (2015)

4.3 Accessibility and Parking

The strategic transport accessibility of employment areas was determined both through desk based research and site visits. Criteria used to assess this include:

- Access to public transport;
- Strategic road access; and
- Availability of parking.

Public Transport

Access to public transport for employment sites was assessed during the site survey visits and through subsequent desk-based research.

Public transport access is measured through considering the range of transport modes and destinations accessible from the area, the regularity of these services and the proximity of transport nodes to the employment clusters.

Table 4-2 provides a list of the fourteen clusters considered to have indirect access to public transport[44].

Table 4-2 Employment Clusters with Indirect Access to Public Transport

Cluster	*Employment Area*	*Area (ha)*
C2	Slate Hall Farm, Helions Bumpstead	0.9
C3	Blois Meadow Business Centre	0.9
C5	Hunnable Industrial Estate, Great Yeldham	4.7
C6	Former Tanner's Dairy, Oxford Lane, Sible Hedingham	2.0
C7	Rippers Court, Sible Hedingham	2.3
C8	Gosfield Airfield	5.7
C11	Bluebridge Industrial Estate	25.3
C13	Riverside Business Park, Earls Colne	2.2
C14	Earls Colne Airfield	23.9
C17	Bovingdon Road, Bocking Churchstreet	0.7
C20	Former Polish Campsite	1.7
C21	Coggeshall Industrial Area	3.7
C22	Threshelfords Business Park, Feering	2.7
C23	London Road, Kelvedon	0.8
Total	**-**	**77.5ha (25.4% of total)**

Source: AECOM (2015)

The majority of sites with poor public transport are located in rural areas, where workers are less likely to use public transport. As a consequence, the accessibility of these clusters is more reliant on the road network.

Strategic Road Access

The strategic road accessibility of employment clusters was determined both through desk-based research and site visits. There are two key strategic roads in the District. The clusters that are located around Braintree, Great Notley and Coggeshall tend to

[44] A site is deemed to have indirect access to public transport if there are a limited number of destinations available from the site, and access is located over a five minute walk away.

benefit directly from access to the A120, which provides a direct link to London Stansted Airport and the Haven Ports. Similarly, clusters located around Witham, Kelvedon and Hatfield Peverel benefit from proximity to the A12, providing direct links to the Haven Ports, Chelmsford and London.

The clusters which are generally some distance from the road network, or can be accessed only indirectly through local roads in residential areas, are listed in **Table 4-3**.

Table 4-3 Employment Clusters with Indirect Strategic Road Access

Cluster	*Employment Area*	*Area (ha)*
C2	Slate Hall Farm, Helions Bumpstead	0.9
C3	Blois Meadow Business Centre	0.9
C4	Greenfield Creations, Ridgewell	0.6
C9	Broton Drive Industrial Area, Halstead	3.7
C10	Halstead Town Centre South	4.0
C11	Bluebridge Industrial Estate	25.3
C12	Atlas Works, Earls Colne	1.5
C13	Riverside Business Park, Earls Colne	2.2
C14	Earls Colne Airfield	23.9
C16	Broomhills Industrial Estate	2.9
C17	Bovingdon Road, Bocking Churchstreet	0.7
C19	Braintree Town	25.3
C20	Former Polish Campsite	1.7
C22	Threshelfords Business Park, Feering	2.7
C24	Kelvedon Railway Station	2.2
C25	Arla Factory, Hatfield Peverel	4.2
C28	Witham Town Centre	3.5
C29	Lynderswood Farm	6.9
Total	**-**	**113.1ha (36.2% of total)**

Source: AECOM (2015)

The assessment found that seventeen of the clusters have indirect access to the strategic road network, constituting around a third of all employment land in the District. Despite good access to the road network in some areas, the majority of clusters did not allow business to make use of alternative forms of transport. Access to both railheads and waterways was deemed to be indirect in all clusters. Eight of the clusters with indirect access to public transport also have indirect access to the strategic road network.

Servicing and Parking

For clusters where manufacturing and warehouse uses predominate, it is important that there is designated and adequate space for the servicing of businesses. The suitability of existing servicing arrangements within each cluster was assessed during the field survey.

Table4-4 Employment Clusters where the Servicing of Businesses is Inadequate

Cluster	*Employment Area*	*Area (ha)*
C7	Rippers Court, Sible Hedingham	2.3
C17	Bovingdon Road, Bocking Churchstreet	0.7
C24	Kelvedon Railway Station	2.2
Total	**-**	**5.2ha (1.7% of the total)**

Source: AECOM (2015)

Generally, industrial locations are adequate; only three of the clusters were observed to have inadequate servicing, in each case due to poor layout issues restricting ease of access from the road.

For clusters where office uses predominate, it is important that there is adequate parking space to accommodate for the needs of businesses, especially where public transport accessibility is poor and there is an increased likelihood that employees will travel to work by car.

Table 4-5 Employment Clusters where the Availability of Parking is Inadequate

Cluster	*Employment Area*	*Area (ha)*
C3	Blois Meadow Business Centre	0.9
C11	Bluebridge Industrial Estate	25.3
C27	Freebournes, Witham Industrial Estate	42.5
Total	**-**	**68.7ha (22.0% of the total)**

Source: AECOM (2015)

At Bluebridge Industrial Estate, a large degree of on-street parking was observed, hindering the ability for HGV vehicles to circulate through the estate. A similar problem is observed at the Witham Industrial Estates, although accessibility is less constrained as a result. As Blois Meadow Business Centre is primarily an office location, the limited quantity of designated parking does not hinder the functional use of the cluster.

4.4 Condition of Employment Areas

The overall quality of each cluster was assessed against the condition of buildings and quality of environment.

In total, 18 out of 29 clusters were considered to be in good or very good condition. To receive this designation over 50% of the sites within the cluster had good/very good building conditions and a good/very good quality of environment. Notable examples of areas in very good condition include at Skyline 120 (C18) and new small warehousing units at Blackwell Drive, Springwood Industrial Estate (C15).

There are areas that, although functioning well, require improvements to their overall condition. The clusters that achieved poor or very poor scores for either of the above criteria are listed in **Table 4-6**. Four clusters scored Poor or Very Poor against both building and environment criteria[45], three of which are located in rural areas towards the north of the District.

[45] Clusters: C2, C4, C5 and C17.

Table 4-6 Employment Clusters with a Majority of their Environment in Poor/Very Poor Condition

Cluster	*Employment Area*	*Area (ha)*
C2	Slate Hall Farm, Helions Bumpstead	0.9
C4	Greenfield Creations, Ridgewell	0.6
C5	Hunnable Industrial Estate, Great Yeldham	4.7
C6	Former Tanner's Dairy, Oxford Lane, Sible Hedingham	2.0
C7	Rippers Court, Sible Hedingham	2.3
C10	Halstead Town Centre South	4.0
C11	Bluebridge Industrial Estate	25.3
C16	Broomhills Industrial Estate	2.9
C17	Bovingdon Road, Bocking Churchstreet	0.7
C20	Former Polish Campsite	1.7
C24	Kelvedon Railway Station	2.2
Total	**-**	**47.3ha (15.2% of the total)**

Source: AECOM (2015)

Note: To receive the Poor or Very Poor designation the majority of buildings within the parcels had to fulfil the following criteria:

Building condition

Poor – some signs of repair and renewal on exterior such as repainting, rendering, windows in poor state, surrounding properties or environments may be poorly kept

Very Poor– building still in use but in very poor condition; with clear signs of repair and renewal needed, surroundings not maintained and/or littered and/or cluttered with rubbish

Quality of environment

Poor – The quality of the streets and the public realm within and surrounding the business cluster are of poor quality (some potholes, some litter, poorly maintained or damaged street furniture). There is not enough street lighting and some perceived safety issues. The business area might be polluted by some noise or air pollution from neighbouring uses and/or heavy street traffic.

Very Poor– The quality of the streets and the public realm within and surrounding the business cluster are of very poor quality (potholes, litter on street, not collected rubbish, etc). There is not enough street lighting and there are perceived safety issues. There is noise or/and air pollution from neighbouring uses and/or heavy street traffic.

4.5 Industrial Activity in Proximity to Residential Areas

A site was perceived as having a potential negative effect on the neighbouring uses if its use was associated with at least two of the following list; noise pollution, air pollution, smell, HGV traffic, significant car traffic.

In total 16 of the 23 employment clusters surveyed containing predominantly B2 and/or B8 uses[46] lie within close proximity to surrounding/nearby residential or other sensitive uses. Of these, only six clusters were observed to undertake activities which could potentially affect residential neighbours. For five of these six clusters, residential has

[46] Excluding C2, C23, C22 and C28 where the predominant use is either office (B1a/b) or non-B use class.

coexisted with industrial uses for some time, but for Rippers Court, Sible Hedingham (C7) new residential development is currently being implemented adjacent to the cluster.

Table 4-7 Industrial Clusters Close to Residential Areas or with Some Bad Neighbour Characteristics

Cluster	*Employment Area*	*Bad Neighbourhood Characteristics*	*Area (ha)*
C2	Slate Hall Farm, Helions Bumpstead		0.9
C4	Greenfield Creations, Ridgewell		0.6
C5	Hunnable Industrial Estate, Great Yeldham		4.7
C6	Former Tanner's Dairy, Oxford Lane, Sible Hedingham		2.0
C7	Rippers Court, Sible Hedingham	✓	2.3
C9	Broton Drive Industrial Area, Halstead	✓	3.7
C10	Halstead Town Centre South	✓	3.2
C12	Atlas Works, Earls Colne		1.5
C16	Broomhills Industrial Estate		2.9
C17	Bovingdon Road, Bocking Churchstreet		0.7
C19	Braintree Town	✓	25.3
C21	Coggeshall Industrial Area	✓	3.7
C22	Threshelfords Business Park, Feering		2.7
C24	Kelvedon Railway Station		2.2
C25	Arla Factory, Hatfield Peverel	✓	4.2
C28	Witham Town Centre		3.4
		Total clusters close to residential areas (ha)	**64.9**
		% of surveyed employment land	**20.8%**
		Total clusters close to residential, with bad neighbour characteristics (ha)	**42.4**
		% of surveyed employment land	**13.6%**

Source: AECOM (2015)

Table 4-7 demonstrates that the large majority of industrial activity in the District is located in a suitable area. Only a fifth of employment space contains industrial uses in proximity to residential areas, demonstrating that most industrial activity exists in self-contained areas, set apart from residential uses, which offers excellent potential for 24 hour working. However, there is an increasing recognition that over time, as pressures on land to accommodate housing and jobs for local people grow, there is an increasing likelihood for residential uses to locate in proximity to industrial land uses.

4.6 Vacant and Derelict Land, and Vacant Floorspace

The site survey identified a number of vacant and derelict areas of land that lie within the employment clusters. This land is consists of either greenfield sites, which have not contained any previous development, and derelict sites that are no longer fit for purpose. This excludes sites that are currently unoccupied but are still suitable for employment uses, and any land observed to be cleared for new development.

Table 4-8 identifies the clusters that contain vacant or derelict land.

Table 4-8 Clusters with Vacant and Derelict Land Suitable for Development

Cluster	*Employment Area*	*Vacant or Derelict Land (Ha)*	*Cluster Area (Ha)*	*Proportion of Land Vacant/Derelict (%)*
C9	Broton Drive Industrial Area, Halstead	1.1	3.7	30%
C10	Halstead Town Centre South	1.8	4.0	45%
C13	Riverside Business Park, Earls Colne	0.9	2.2	41%
C15	Springwood Industrial Estate	1.1	63.3	2%
C18	Skyline 120	5.1	20.7	25%
C26	Eastways, Witham Industrial Estate	1.8	41.3	4%
Total	**-**	**11.8 (3.9% of all clusters)**	**135.2 (44.1% of all clusters)**	**-**

Source: AECOM (2015)

Vacancy of industrial stock was observed to be low for both prime/new stock and older premises offering lower grade but functional premises on established industrial estates. This was confirmed by commercial agents who suggested that occupiers are happy to take the second hand/refurbished premises, where they can benefit from the value made in savings from utilising existing stock and retrofitting as necessary rather than acquiring and building a new facility. The market has tightened up a lot in the past two to three years as the economy and business confidence broadly has picked up. Based on this information we believe the market is operating below its optimum frictional floorspace vacancy level at around 5% of stock[47]. This is supported by recent research compiled by Bidwells which in spring 2015 estimated that the vacancy rate of industrial premises was 2% of the total stock in the District[48]

Vacancy of office stock in the District follows a similar pattern. We observed relatively low vacancy throughout the site survey. This was confirmed in consultation with commercial agents, who implies that the office market was performing strongly, particularly new small to medium-sized units that have come to the market. Based on this assessment we believe the market is operating around its optimum frictional floorspace vacancy level of around 8% of stock.

4.7 Intensification/Redevelopment Potential

The site survey identified any potential for areas of each cluster to either be intensified or redeveloped. **Table 4-9** identifies the clusters where intensification and/or redevelopment may be suitable. C29 (Lynderswood Farm) is listed in 4-9. Though it is actively used it is predominantly used for open storage and has low employment density across the site. As such we have included the cluster in the table.

[47] Frictional vacancy is defined as the optimum level of surplus capacity in the market at any given time to allow an efficient churn of occupancy. The Greater London Authority (2012) Land for Industry and Transport Supplementary Planning Guidance (SPG) provides a benchmark for what is an appropriate level of frictional vacancy for industrial and office uses, which could be applied to Braintree District. For industrial uses frictional land vacancy is suggested as 5% and for office uses it is suggested as 8% of stock. Vacancy levels below the rates of frictional floorspace or land vacancy could act as a constraint on economic activity.

[48] Bidwells, (2015); Business Space Data Book, Spring 2015

Table 4-9 Employment Clusters with Potential for Intensification and/or Redevelopment

Cluster	*Employment Area*	*Use Class*	*Potential for Intensification*	*Potential for Redevelopment*	*Area (ha)*
C2	Slate Hall Farm, Helions Bumpstead	Other	-	Whole site	0.9
C4	Greenfield Creations, Ridgewell	B8	-	Whole site	0.6
C5	Hunnable Industrial Estate, Great Yeldham	B1c/B2	-	Whole site	4.7
C9	Broton Drive Industrial Area, Halstead	B1a/b, B1c/B2	A large vacant plot opposite the cluster provides a developable area	-	3.7
C10	Halstead Town Centre South	B1c/B2	-	Whole site	3.2
C16	Broomhills Industrial Estate	B1c/B2	-	Whole site	2.9
C17	Bovingdon Road, Bocking Churchstreet	B8	-	Whole site	0.7
C19	Braintree Town	B1a/b, B1c/B2, B8	Potential to intensify underutilised premises	-	25.3
C24	Kelvedon Railway Station	B2	-	Whole site	2.2
C27	Freebournes, Witham Industrial Estate	B1c/B2, B8	-	Southern point of cluster	42.5
C29	Lynderswood Farm	B1c/B2, B8 including open storage	Site is predominantly used for open storage. Potential to intensify employment on site.	-	6.9ha

Source: AECOM (2015)

All of the sites identified as having potential for redevelopment are identified as having either Poor or Very Poor building condition, while four of the eight have a Poor or Very Poor quality of environment.

4.8 Types of Employment Premises

The type of premises found on employment clusters vary not only by use class but also by the size of premises provided, quality of premises and type of occupier. To better understand the supply of premises and types of premises that businesses occupy we have identified five broad typologies of employment premises found in clusters in Braintree District:

1. Small office units (use classes B1a/b): the District contains a small quantity of often converted or refurbished units, that tend to be located in secondary locations

2. Medium sized office units (use classes B1a/b): these units tend to be multi-storey, housing one large occupier, with the small number most commonly observed in town centre areas

3. Small warehouse and small workshop units (use classes B8 and B1c/B2): designed with roll shutters to provide both manufacturing and warehouse functions, this is the most common typology in the District, although the quality of units is often poor

4. Large manufacturing units (use classes B1c/B2): the District houses a small number of large manufacturing premises, the characteristics of which are often determined by the specific needs of the occupier. These premises tend to be located in rural, isolated areas; and

5. Medium/large warehouse units (use classes B8): characterised by steel frame, curtain wall, high eaves, stand-alone sheds, this typology is commonly located in areas with strong links to the strategic road network.

We discuss these typologies and their function below.

Small Office Units

Providing typically less than 1,000 sqm (10,764 sqft) of floorspace with segregated units within, these premises are purpose built or converted light industrial units or barns refurbished specifically for modern office occupiers. Provision is often located in secondary office locations such as marginal locations within retail parks, general industrial estates or rural locations. These premises tend to suffer from poor public transport access, and as a consequence require good parking provision. **Figure 4-7** provides examples of this typology observed during the site survey.

Figure 4-7 Examples of Small Office Units

Source: AECOM (2015). Locations from top left clockwise: Braintree Town (C19); Atlas Works, Earls Colne (C13); Blois Meadow Business Centre (C3); Braintree Town (C19).

These units tend to be red brick and stand alone, although Lakes Innovation Centre in Braintree (C19, top-left) provides an example where this is not the case. A number of

B1a uses, such as financial services, were located alongside more suitable B1c uses of this space, with activities including printing and design. Coupled with the small quantity of provision of this typology across the District, this suggests that the market for small offices may be supply constrained.

Small office units are also commonly observed across a number of more rural locations, which may provide suitable locations for SMEs. For instance, a number of technology-based companies were observed at the Blois Meadow Business Centre (C3). This space is typically a first location for a new business, providing an affordable interim location from which an occupier may move on with the scaling up of activity over time. Whereas business start-ups tend to traditionally be located within town centres, anecdotal evidence suggests that rural locations may become increasingly viable locations for businesses such as SMEs requiring small and affordable office space. The expansion of rural broadband provision will increase the desirability and feasibility of such locations.

Furthermore, this form of typology allows for wider socio-economic needs to be catered for. Traditional office uses do not create the negative effects generated by other employment uses. The Blois Meadow Business Centre (C3) and Eastways, Witham Industrial Estate (C26) were two examples where nursery facilities were observed within proximity to office uses.

Blois Meadow Industrial Estate provides an example of the type of premises that typical small office occupiers' demand. This location prides itself on its high quality of working environment, providing a range of modern buildings with a strong sense of character. The offer includes benefits such as energy efficiency and security, alongside broadband internet connection.

A large degree of focus is placed on an occupier's specific requirements. This location provides a wide variety of unit sizes, ranging from 250sqft to 1,000sqft (23sqm to 93sqm), while office accommodation is either adapted or newly built to match occupiers' needs. Evidence gathered through consultation suggests that there is a strong demand for suitable space for SMEs in the District. High levels of occupancy at enterprise centres in Braintree and Witham are indicative of an under-provision of this form of space, suppressing unmet demand.

Occupiers of units at this location include architects, accountancy firms, designers, software companies and hi-tech components suppliers.

Medium Office Units

Medium office units (use classes B1a/b) are less common in Braintree District. This typology is typically in excess of 1,000sqft (93sqm) in size, and tends to house one large occupier. As a consequence, occupiers of this space tend to consider their location on a regional level. The low levels of provision of this typology implies that the District may lose out in such occupancy to areas with a greater stock of units, such as Chelmsford and Colchester, which are better placed to meet occupiers' specific needs through a greater variety of provision. Typical occupiers include 'back office' financial service activities and public sector organisations.

Figure 4-8 Examples of Medium Office Units

Source: AECOM (2015). Locations: Witham Town Centre (C28, top-left, top-right, bottom-left); London Road, Kelvedon (C23, bottom-right).

These units tend to locate in more town centre locations, benefitting from good access to public transport and local amenities. A typical medium office unit is red brick and multi-storey, generally in a stand-alone plot with a large provision of parking spaces and a good quality environment. The recent increase in provision of this typology, most notably at Skyline 120 (C18) is indicative of increasing demand for this space. This typology was less commonly observed throughout the site survey.

Traditionally this typology tends to locate in town centres, where access to facilities and amenities, alongside good access to public transport, provide a suitable location for a large influx of workers. Examples of this typology were observed within the District's town centres, notably the Freeport Office Village (C19) in Braintree and a dispersed cluster of stand-alone units in Witham Town Centre (C28).

However, this typology was also observed in rural locations such London Road (C23) and Threshelfords Business Park (C22). Although suffering from poor public transport accessibility, these clusters benefit from relative proximity to the A12, and provide anecdotal evidence to support the evidence of commuting by road outlined in **Section 3.3**. High value sectors, such as technology design and marketing, were observed on both sites. At London Road in particular the office unit was located in close proximity to industrial activity. A medium office unit locating at this site draws into question whether there may be a lack of suitable alternative locations for these sites to develop.

Witham Town Centre provides an example of the type of premises that typical medium office occupiers demand. This location provides dedicated parking provision and well as off-street loading and unloading. The offer includes benefits such as good access to facilities and amenities with links to public transport.

Small Warehouse and Workshop Units

Small warehouse and workshop units are the most common typology in Braintree District, housing B1c/B2 and B8 activities respectively. They have been grouped together due to their similar physical characteristics and the large degree of crossover in employment activities they facilitate.

Figure 4-9 Examples of Small Warehouse and Workshop Units Typology

Source: AECOM (2015). Locations from top left clockwise: Eastways, Witham Industrial Estate (C26); Freebournes, Witham Industrial Estate (C27); Broton Drive Industrial Area, Halstead (C9); Springwood Industrial Estate (C15).

Units tend to be older and, although there is some evidence of refurbishment, they are generally of a poorer quality. These units tend to be designed with roll shutters to provide both manufacturing and warehouse functions. An example of this is at Riverside Business Park in Earls Colne (C13), where this typology was observed to house both traditional manufacturing and small-scale logistics operations. This typology generally has ancillary office to support industrial activity. Due to their size the lower-level adverse impacts of occupiers, such as traffic generation and noise pollution, mean that this accommodation can be located closer to residential areas than larger industrial accommodation.

Despite the mix of uses of this space, these units tend to be located in stand-alone clusters. The Wheatear and Briarsford Industrial Estates in Freebournes, Witham Industrial Estate (C27) provide examples of this. They tend to be located in fringe areas of towns, providing a functional use of land where there is relatively little pressure for a change of use. In terms of geographical spread across the District, this typology is commonly found in the larger industrial estates associated with the District's main town centres, such as Springwood Drive (C15) and Bluebridge (C11) industrial estates in Braintree and Halstead respectively. These locations generally provide good access to the road network, and tend to have low vacancy. However, a number of smaller stand-alone clusters were observed that were associated with smaller conurbations, such as Coggeshall Industrial Area (C21). With a greater scarcity of the alternative sources of employment, these locations provide a vital role in supporting the local economy.

The interchangeability of this typology influences the form of activities it houses. Where manufacturing is present in these units, it is generally in the form of adding value along the supply chain, rather than manufacturing a good in isolation. Although an important source of local employment, such businesses may not provide significant value to the wider local economy.

This typology also demonstrates the importance of the road network to many employment clusters in Braintree District. Alongside the logistics uses of this space, the nature of manufacturing requires a well-functioning road network to support the transport of goods and manufactures in and out of these areas.

Broton Drive Industrial Area, Halstead is an example of the small warehouse and workshop unit typology, with units typically one storey B1c/B2 with roll-shutters. This location has strong access to the road network and providing interchangeable workshop space mostly of good building condition with some in poor condition.

The units typically comprise workshop space with some small office space present, suggesting this typology is able to flexibly accommodate a range of B use classes. Broton Drive Industrial Area, Halstead has evidence of older units being re-clad, although some estate management is required to fix walls.

Occupiers of units at this location include just-in-time companies, general industrial and light manufacturing companies and car workshops.

Large Manufacturing Units

Large manufacturing units (use classes B1c/B2) are less common in Braintree District. These units are typically over 10,000sqft (929sqm) in size and often include some office, warehouse and/or open storage uses within the site.

Figure 4-10 Examples of Large Manufacturing Units Typology

Source: AECOM (2015). Locations from top left clockwise: Earls Colne Airfield (C14); Arla Factory, Hatfield Peverel (C25); Gosfield Airfield (C8); Earls Colne Airfield (C14).

Examples of large manufacturing units are defined by the nature of the manufacturing process. Examples of this include the concrete manufacturing plant at Earls Colne Airfield (Cluster 14) and car transporter manufacturing at Gosfield Airfield (Cluster 8). The car transporter plant provides evidence of linkages across the Haven Gateway, with the goods produced linked to logistics associated with Harwich International port. Due to the negative effects that result from these uses, such as noise and air pollution, they are most commonly observed in rural locations.

As the requirements for this space vary by activity and need, attracting occupiers of this typology relates to the provision of suitable land rather than specific building characteristics. Furthermore, due to the sunk costs associated with forming these manufacturing units, occupiers are less flexible in their choice of location. The success of this typology is more closely aligned with wider economic trends than any particular local factors.

The Arla Factory, a milk producer located at Hatfield Peverel, is a large, self-contained employment location and is an example of this typology. The Arla Factory offer reflects its occupier's focus on location rather than necessarily the environment or specific building characteristics. The site is situated in an isolated location having regard to bad neighbour uses and pollution.

This manufacturing unit benefits from its location in proximity to the strategic road network, supporting the function of the transportation of goods being produced at the facility.

Medium/Large Warehouse Units

Medium to large warehousing units (use class B8) are commonly found in the District, and tend to be located in clusters large industrial estates as opposed to stand-alone sites. Medium units tend to range between 5,000sqft to 10,000sqft (465sqm to 929sqm), whereas large warehouse units tend to exceed this.

Figure 4-11 provides examples of this typology observed during the site survey. They are characterised by a steel frame, high eaves, curtain wall stand-alone shed surrounded by vehicle parking and access. Occupiers of such units usually place more emphasis on having good links to the strategic road network than on proximity to public transport, as employment densities are typically low. Large warehouse units are most commonly found at the marquee industrial locations towards the south of the District; Witham Industrial Estates (C26 and C27) and Springwood Industrial Estate (C15) in Braintree.

Figure 4-11 Examples of Medium/Large Warehouse Units Typology

Source: AECOM (2015). Locations from top left clockwise: Springwood Industrial Estate (C15, top-left, top-right); Earls Colne Airfield (C14); Coggeshall Industrial Area (C21).

Occupiers of this typology provide the clearest example of the positive spillover effects of London Stansted Airport. An example of this is the large warehouse located at Coggeshall Industrial Area (C21), located in close proximity to the A120, which provides a distribution centre for the aviation industry.

Greater demand for this typology is observed. The increasing provision of new high specification medium to large warehousing units, provided by Skyline 120 for instance, reflect an increasing demand for larger units. Plans to provide additional industrial units as outlined by the Land west of the A131, Great Notley Masterplan are further indication of this trend. By increasing provision of this typology along strategic road networks, Braintree District may be able to capture an increasing share of logistics activities associated with both London Stansted Airport and Harwich International port.

Skyline 120, located at Great Notley, has established itself as a regionally significant employment location and is an example of this typology. Occupiers of units at this location include aerospace, logistics and interior design sectors. This business park typifies the form of warehousing that modern occupiers require. The Skyline offer revolves around the application of design criteria to suit individual occupier requirements.

The Skyline 120 offer is focused on quality of both environment and location. Situated at a stand-alone location, this site provides an environment suitable for modern occupation, facilitating 24 hour working alongside the provision of facilities and amenities. In addition, it is highly accessible to the strategic road network, with proximity to the A120 and A131 providing fast access to London Stansted Airport and the national motorway network. A recent application has been put forward for eighteen units towards the north east of the site[49].

4.9 Presence of Non-B class Occupiers

Many industrial areas provide suitable locations for wider employment uses. These include waste management, recycling, and use of land for transport. The Braintree Recycling Centre, located at Springwood Industrial Estate (C5), is the only example of waste management observed through the site survey. There were also two bus depots, one at Springwood Industrial Estate (C15) and the other at Kelvedon Railway Station (C24).

A number of additional uses of employment land were observed throughout the site survey. *Sui generis* activities include a range of industries which, though they may be employment generating, do not fall in the B1, B2 or B8 use class order but nevertheless are often associated with industrial sites in particular. Examples include MOT servicing centres, premises selling and/or displaying motor vehicles and scrap yards. There is evidence too of community or leisure uses such as nurseries and gyms (D use classes). In addition, warehouse retail and trade centres, defined as A1 (Shops) by the use class order, are also observed within employment areas.

[49] See planning application: 15/00582/FUL.

Figure 4-12 Examples of Sui Generis and Non B Uses Classes

Source: AECOM (*20*15). Locations: Braintree Town (C19, top-left, top-right, bottom-left); *Halsted Town Centre North (C9, bottom-right).*

Table 4-10 Employment Clusters with a significant presence of Non-B use class Occupiers[50]

Cluster	*Employment Area*	*Area (ha)*
C9	Broton Drive Industrial Area, Halstead	3.7
C11	Bluebridge Industrial Estate	25.3
C15	Springwood Industrial Estate	63.3
C18	Skyline 120	20.7
C19	Braintree Town	25.3
C24	Kelvedon Railway Station	1.0
C26	Eastways, Witham Industrial Estate	41.3
C27	Freebournes, Witham Industrial Estate	42.5
Total	**-**	**224.3ha (73.6% of the total)**

Source: AECOM (2015).

As **Table 4-10** demonstrates, the presence of *sui generis* uses on industrial land is widely observed across the District, and may provide a significant threat to industrial employment uses. Non-B use class occupiers are most commonly observed at the larger industrial areas, which may be due to a desire for some uses (trade counters, scrap yards etc.) to locate nearby potential customers.

Generally, the presence of non-B uses classes on established industrial estates will be the result of a number of factors. The suitability of premises to accommodate modern occupier needs and the demand and rental value of premises may decline over time. This can leave some premises empty and provide an opportunity for non-B uses to

[50] Where over 10% of the cluster area is occupied by non-B land uses, usually *sui generis* or retail activities.

move in. Our site survey, however, found that non-B uses were not restricted to traditional industrial estates with poorer quality units where demand was low. The presence of a gym at Skyline 120 – on a new build, high specification unit - suggests there are other factors to consider; perhaps a lack or choice of appropriate premises. Industrial land in the District is typically provided on well-defined and designated estates and there are relatively few alternative locations for some non-B use class uses such as *sui generis* uses, which often share the same locational requirements as industry (strategic access, quality of environment, rental values, no sensitive receptors adjacent to the site, for instance).

As noted in **Section 5.3** the District has low vacancy rates for industrial premises so a key question then is whether non-B use classes and *sui generis* uses are crowding out core industrial uses (B1c/B2 and B8 use classes). Our site survey work suggests not, but future monitoring should look to record any change away from industrial to non-B uses classes and identify where the functioning and integrity of industrial estates is being negatively affected.

4.10 Land Values and Permitted Development Rights

Land Values by Use Class

The Land Value Estimates for Policy Appraisal Report[51] provides land value estimates for the purpose of policy appraisal. The land value estimates allow simple comparisons to be made between the value of employment land and other land uses such as agricultural and residential – the two other main land uses in Braintree.

The Report suggests that the average industrial land value per hectare across England is £482,000. This assumes a typical, urban, brownfield location with nearby uses likely to include later, modern residential developments; with all services available to the edge of the site. The average cost of agricultural land in England is estimated at £21,000 per hectare[51]. The comparatively low land value for agricultural land can be attributed to balance of supply and demand for agricultural land, the physical attributes of agricultural land and the governmental forces of planning restrictions on the change of use from agricultural land to alternate uses. Residential land in Braintree District is valued at an average of £2,360,000 per hectare[51]. The comparatively high land value reflects the imbalance of demand for housing in contrast to supply, which drives house prices.

Permitted Development Rights

Though commercial office rents in prime locations of the District offer good commercial returns, the demand for housing and high residential land values are driving the conversion of offices to housing. Permitted development rights allowing conversion from B1a use classes (office) to C3 use classes (residential) without planning permission means that office stock has been lost in the District. The District has seen a loss of 7,085sqm (76,262sqft) of office floorspace over the period April 2014 to March 2015[52]. The majority of floorspace was lost to residential uses at two locations; 4,205sqm (45,262sqft) at Wards Farm, Bartholomew Green[53] and 2,280sqm (24,542sqft) at Eastways, Witham Industrial Estate (C26)[54]. Consultation with property agents[55] suggests that the change to the permitted development rights order, allowing conversion of offices to residential uses, is a positive step and will have a limited negative effect on employment land supply. This is because in practice the conversion

[51] DCLG, (2015): Land Value Estimates for Policy Appraisal.

[52] Braintree District Council, (2015); Non-Residential Land Availability as at 31st March 2015.

[53] See planning application: 14/00866/FUL.

[54] See planning application: 14/00005/COUPA.

[55] See **Appendix B** full list of property agents contacted.

of stock is focussed on offices which are not fit for modern business purposes and have typically been vacant for a significant period of time. Developers bringing out of date office stock back into the market need to take into account conversion costs and risk. The investment required to bring outdated office stock back to the standards expected by the market (for either residential or office) are generally quite similar. This means the office site owners will often make the decision to convert out of date offices to residential as it has a shorter payback period. The need for prior approval for conversion of offices to residential uses where there might be negative impacts on surrounding areas, represents a form of development management.

4.11 Development Pipeline

Information provided by the Non-Residential Land Availability[56] document outlines the recent changing trends in net floorspace as a result of new developments and use changes. It also provides an indication of the scale and location of future employment spaces, both in the form of consented permissions and land identified for non-residential uses.

Recent Trends in Net Floorspace

Table 4-11 provides an indication of the net change in office and industrial floorspace over the preceding five years.

Table 4-11 Net Floorspace Changes by Use Class (2009-2014)

	Office Development (B1a) sqm	*Industrial Development (B1b/B1c/B2/B8) sqm*
Net Floorspace Changes (2009-2014)	-6,955 (-74,863 sqft)	-36,095 (-388,523 sqft)

Source: Braintree District Council (2014)

It shows that the floorspace of both office and industrial use classes have contracted over this period. The largest annual loss in industrial floorspace during this period was experienced during 2009-2010; however this loss was the demolition of obsolete factory buildings on the former Crittall Works site in Silver End, which were deemed unsuitable for retention for industrial activity (see **Section 4.12**).

Planned Permissions

Within the District there are a number of sites or premises where planning permission for new development or where a change of use has been granted but not yet implemented. These new developments may result in either the gain or loss of floorspace.

[56] Braintree District Council, (2014); Non-Residential Land Availability as at 31st March 2014.

Table 4-12 Net Floorspace Permissions by Location

	Office Development (B1a) sqm	*Industrial Development (B1b/B1c/B2/B8) sqm*
Braintree (inc. Bocking and Great Notley)	635	22,961
Witham	6,206	-240
Halstead	-300	-2,457
Haverhill Industrial Estate	371	0
Rural Areas	4,091	5,438
Total	**11,003**	**25,702**

Source: Braintree District Council (2014)

Existing permissions have the potential to increase the quantity of office and industrial floorspace by 11,000sqm and 25,700sqm respectively. A large driver of the positive office permissions come from the business park planned at the site south of Maltings Lane Business Park (Cluster 33), which has the potential to increase the stock of office floorspace by 8,196sqm. As **Table 4.12** indicates that net industrial permissions are most positive around Braintree, driven by demand to locate at the Skyline 120 Business Park in Great Notley. 63% of office and 79% of industrial floorspace that has been permitted but is unimplemented is located around the District's three urban areas.

Since the Non-Residential Land Availability Report was published, a number of planning applications have been submitted to Braintree District Council, which provides details on the types of premises the market is looking for.

Table 4-13 Planning Applications by Use Class April 2014 – May 2015

Planning Application Reference Number	*Location*	*Use class*	*Development description*	*Status*	*Net additional floorspace (sqm)*
15/00455/FUL	Witham	B1(a),B8	Proposed mezzanines to form additional office and storage space with associated access	Pending consideration	429
15/00459/FUL	Braintree	B1(a)	Erection of first floor extension to Class B1 company office	Pending consideration	207
15/00447/FUL	Witham	B1(a)	Erection of new office building on part of the site of the old Bramston Sports Centre	Pending consideration	1,078
15/00086/FUL	Halstead	B1(a), B2	Erection of two storey office and general industrial building, with associated external works	Pending consideration	1,150
15/00430/OUT	Witham	B1a/b	Mixed-use development including enterprise centre	Pending consideration	25,000
Total	-	-	-	-	**27,864**

Source: Braintree District Council (2014)

A recent application[57] for the provision of an enterprise centre as part of a mixed use development in Witham is currently pending consideration. This mixed-use development is located at the Land Adjacent to Lodge Farm site, north of the B1389 in South Witham. A recent study[58] found favourable evidence of demand for such space from businesses, local stakeholders and property agents. The outline application seeks to provide an enterprise centre which could compromise of A and D uses alongside providing B1 office space on land of up to two hectares in size.

[57] Planning application: 15/00430/OUT

[58] DTZ, (2015); Witham Enterprise Centre Feasibility Study.

Table 4-13 demonstrates that planning applications in the pipeline, if approved, will further increase the quantity of office floorspace within the District, with no industrial planning applications identified between April 2014 and May 2015. Several of the planning applications will support the existing occupiers' needs by adapting the existing function of the workplace. The other applications suggest that there is demand for medium sized office space within the District, as evidenced by the applications for new office buildings in Witham and Halstead.

4.12 Potential Employment Sites

In addition to the clusters identified under Table 4.1, there are a number of other sites which could potentially accommodate demand for employment uses. These are strategic and mixed use regeneration sites, undeveloped sites proposed for business uses, and sites identified in the call for sites process. We discuss these sites briefly below.

Strategic and Mixed Use Regeneration Sites

Policy CS4 of BDC's Core Strategy identifies four key strategic and mixed use sites with the potential to support significant employment growth. These are listed in the **Table 4-14** and the suitability for employment provision discussed briefly below. *Land to the north-west of Panfield Lane*

As outlined by the North West Braintree Masterplan, this site aims to include up to 15ha of employment land across all use classes (including land for sports use). This site is situated directly north of Springwood Industrial Estate (C15), and benefits from many of the suitable locational attributes for employment use. These include good access to public transport links and proximity to the A120. The site survey demonstrated that demand at the existing Springwood Industrial Estate is strong, with little observed vacancy. The site assessment determines that this is a very suitable location for all employment uses.

Land to the west of the A131 at Great Notley (Eastlink 120)

The land to the west of the A131, Great Notley is promoted by Braintree as a strategic Growth Location which will aim to include up to 18.5ha of employment land across all use classes. This site is situated southwards of the Skyline 120 Business Park, which scored well in the site survey particularly on location and access to the strategic road network, and shares many of the good locational attributes for employment use. Its proximity to the A120 and A131 provides fast access to London Stansted Airport and the national motorway network. The Skyline 120 Business Park is considered suitable as an employment location.

Premdor/Rockways Regeneration Site at Sible Hedingham

The Premdor/Rockways Regeneration Site Masterplan suggests that the mixed-use redevelopment of this site aims to include 0.1ha of employment land for an enterprise hub to include flexible meeting spaces. The site is situated directly east and south of the Rippers Court cluster (C7), which suffers from relatively poor servicing, with the northern access onto the site joining the same narrow residential road causing some congestion issues. However, the Masterplan indicates that the enterprise hub will be located to the west of the site, in proximity to the A1017. Servicing issues at the nearby employment cluster are therefore unlikely to apply to this enterprise hub. The site survey concluded that demand at the existing Rippers Court site, which contains a number of smaller units, is strong, suggesting that this is a suitable location for an increase in the provision of small office space. It is evident that the residential component of the site is under construction, with the remaining employment space to be provided adjacent to the Berwick court site access to the west of the site.

Silver End Mixed Use Regeneration Site

The site measures 3.85ha and is earmarked by the Council's Core Strategy to provide a mix of uses on site including an element of employment land, although it is not clear how the Council intend to split these uses. The Pre-Submission Site Allocations and Development Management Plan[59] estimates that 80 units could be provided on site as part of the mix of uses. This site is situated within a predominately suburban residential context. The Silver End site has been partially cleared for redevelopment although the original Crittall factory buildings, power house and garden have been retained on site. Although the site was previously used for employment purposes, due to poor strategic access and proximity to residential uses, it is judged to be less suitable for employment uses and it is unlikely that any future development on this site will contain significant (if any) employment uses.

Undeveloped Sites for Business Uses

Maltings Lane Business Park (Gershwin Park)

In addition to the four sites listed above, the Core Strategy defines the Maltings Lane Business Park, towards the south-west of Witham, as a suitable area to provide sustainable local employment opportunities. This is not defined as a Strategic Site within the Core Strategy due to the large amount of existing employment land at Witham.

This site is located towards the south of the Maltings Lane, as part of the urban extension towards the south-west of the town. This area is defined as a Growth Location by Core Strategy CS1, which anticipates a minimum of 600 dwellings will be provided, phased between 2017 to 2026. The Maltings Lane Business Park will provide 3.8ha of land for office uses across three individual sites. This cluster is located within close proximity to the A12, and will likely benefit from direct public transport links and good provision of local amenities associated with the forthcoming residential development. The site assessment determines that this is a very suitable location for all employment uses.

A summary of the five potential employment sites outlined above is set out below.

Table 4-14 Potential Employment Sites Identified in Policy

Cluster	Employment Area / Cluster Name	BDC Policy Designation	Use Class	Area (ha)
C30	Land to the north-west off Panfield Lane	Strategic Site	B1/B2/B8	15.0[60]
C31	Land to the west of the A131 at Great Notley (Eastlink 120)	Strategic Site	B1/B2/B8	18.5
C32	Premdor/Rockways Regeneration Site	Mixed Use Regeneration Site	B1	0.2
C33	Silver End	Mixed Use Regeneration Site	Not stated	0.0[61]
C34	Maltings Lane Business Park (Gershwin Park)	Business Uses[62]	B1	4.0
Total				**37.7ha**

Source: AECOM (2015)

[59] Braintree District Council, (2014) Pre-Submission Site Allocations and Development Management Plan.

[60] A proportion of this land will be taken up by sports use (see Section 2.4).

[61] As stated above it is unlikely that this site will support additional employment uses.

[62] Identified in the Pre Submission Site Allocations and Development Management Plan (Braintree District Council, 2014). This site has no existing businesses uses.

Sites Put Forward in the Call for Sites Process

In addition to the survey of existing employment areas, a number of sites were identified as potential employment areas as part of the Council's call for sites process. This generated a response of 329 sites, of which 59 were proposed for either B1/B2/B8 employment uses or mixed use, with some B1/B2/B8 component. In total, the call for sites proposed for mixed/employment use cover 1,321ha (excluding existing employment land), of which 1,006ha (76%) was surveyed.

The spatial distribution of the 59 responses to the Call for Sites proposed for mixed use/employment use highlights several general characteristics. The majority of sites are distributed along the fringe of urban/rural setting and are located adjacent to or nearby existing employment uses, with the main sites being around the key settlements of Braintree, Halstead and Witham. Many sites are of a large size capable of facilitating a significant quantum of employment space with the potential to become a significant stand-alone employment cluster.

Many sites are located in close proximity to existing employment clusters. Key locations that demonstrate this are Land at Panfield, northwest of Springwood Industrial Estate, Braintree (PANF136) and Land east of Bluebridge Industrial Estate, Halstead (COLE188). Employment uses at these locations would be suitable, realising the benefits of the road infrastructure already in place and proximity to the strategic road network.

In addition, a number of key sites have been identified with the potential to facilitate a large quantum of new housing. Where this is the case, there may be further opportunities to integrate the provision of employment space as part of a mixed-use development. This could encourage the retention of residents as employees in the District. There are two large sites in Braintree District that have the potential to facilitate such a scale of development. One is at Andrewsfield (GRSA269) and Boxted Wood (GRSA270), located to the west of Braintree which crosses over into Uttlesford District. Together this site on the Braintree District/Uttlesford border has direct access to the dualled section of the A120 which links Braintree with London Stansted Airport and the M11, suggesting they would be a suitable location for employment use. The second large site is the West Tey New Settlement (FEER231), the majority of which is within Colchester District. Located at the junction adjoining the A120 and A12, a new settlement at this site would also provide a suitable opportunity for employment land provision as well as the potential for a large amount of housing.

It is recognised that in many cases employment land has been identified as a component of a larger mixed-use strategy. These sites each pose an opportunity for local-level job creation to support the new communities. However, the extent to which these sites may be required to accommodate excess demand for employment land in the District is conditional upon the current and future balance of supply and demand. This is considered in more detail in **Section 6**.

4.13 Conclusions

A total of 28 clusters defined as Employment Policy Areas or Business Use Areas (as identified from the District's Pre Submission Site Allocations document) and one non-designated over 0.25ha were surveyed. The assessment of qualitative characteristics was carried out against site appraisal criteria set by AECOM and agreed with the Council. A comparative analysis of the quality and characteristics of clusters for employment uses was undertaken on the basis of the land contained within the lined boundaries of clusters.

In addition, five other sites defined as strategic or mixed use by the Core Strategy; a Business Use area, as defined by the Pre Submission Site Allocations document, which is currently undeveloped; and a number of large sites identified in the Call for Sites process, were assessed.

Office

This survey found evidence of demand for a high quality small business office market. There is evidence that provision of higher quality small office units has recently expanded, with a mix of new provision and older units refurbished to meet modern specifications available.

The small office market plays an important role in supporting entrepreneurship. These units are often relatively affordable, and provide suitable space for SMEs to occupy. A large quantity of provision is focussed in rural locations, with Blois Meadow Business Park (C3) and the Threshelfords Business Park (C22) characterising the requirements of modern occupiers. Improvements in technology and access to broadband internet connections have shifted the specifications required by businesses, with high value occupiers placing a greater focus on the quality of environment as opposed to location. There is also a limited provision of local office space in core retail areas such as town centres, catering for local businesses with small catchments. This is the most suitable location for growth, although provision of available land is limited, and is subject to the greatest conflicting demands for other land uses.

There is a limited quantity of medium and larger office stock, with Witham Town Centre (C28) providing the most notable example. Where larger space is observed, it tends to be purpose built and older in age, with little new development observed across the District. Without sufficient grow on space to allow small enterprises to expand, there is a risk of either constraining business growth or the entire relocation of businesses to other areas with more suitable facilities. Although smaller in size, an example of this issue is found at Atlas Works in Earls Colne (C12). With only small office spaces provided, businesses are observed to occupy multiple independent units.

The lack of variety in office space also limits the capability of Braintree District to capture larger occupiers who consider their location at a regional level. Little occupancy of regional importance was observed, due in part to limited site options. However, opportunities offered by recent and upcoming developments such as Skyline 120 and Gershwin Park may provide the high grade, flexible space suitable for these occupiers, drawing new businesses and employment into the District.

Industrial

Industrial activities occupy the large majority of employment land in Braintree District. There are a number of well performing industrial areas, such as the Springwood, Witham and Bluebridge Industrial Estates, that are found in conventional fringe of town locations with good access to the strategic road network. Large and in functional use, there are few signs of contraction in these key locations, with vacancy generally observed to be very low. There is little evidence of the long-term underlying trend of a contraction in industrial uses, with greater demand for distribution and logistics provision at these sites. This implies that the erosion of industrial land may be more predominant in smaller clusters, which may suffer from a more marginal location and lack the critical mass to support employment activity.

One of the crucial drivers of future demand is location. Areas with direct strategic road access, the majority of which are to the south of the District, are in a better position to attract occupiers associated with the regional logistics market. Skyline 120 provides an indication of the requirements of large-scale modern occupiers, combining high quality grade units with direct access to the A120 and A131.

Alongside these sites there are a number of smaller clusters of workshop/warehouse space, commonly used for manufacturing purposes and small-scale logistics. Besides a few notable occupiers, manufacturing is generally on a small scale, adding value to products along the supply chain. The key consideration for the continuing function of these sites is protection, against both the threat of loss to residential uses and the erosion of space for traditional employment functions by sui generis occupiers.

5 DEMAND ASSESSMENT

5.1 Introduction

This section examines the current and future trends in the Braintree District office and industrial land market.

5.2 Property Market Area

Businesses searching for sites or premises will typically consider a number of similar locations in a given area unconstrained by administrative boundaries. In order to consider trends in Braintree District, it is therefore appropriate to consider the wider functional area the District sits in, termed a Property Market Area (PMA). This corresponds to the PPG which states that needs should be assessed in relation to the relevant Functional Economic Market Area[63]. An appropriate PMA will reflect patterns of travel to work and the pool of labour available to employees. It will also consider appropriate geographical constraints, following transport networks and reflecting the ease of movement within the area.

We define the PMA for office and industrial uses as incorporating the following local authorities:

- Braintree;
- Chelmsford;
- Colchester; and
- Uttlesford.

This area reflects the strong crossover in labour between Braintree District and Colchester, and the large degree of out-commuting by Braintree residents to the regional economic hubs of Chelmsford and London Stansted Airport (see **Table 3-4** and **Table 3-5** in Section 3). It also follows the established linkages across the A120 Haven Gateway, and reflects the low degree of commuting between Braintree District and local authorities to the north, such as Babergh, St Edmundsbury and South Cambridgeshire (discussed in **Section 2.3**).

5.3 Property Market Indicators

This section provides an assessment of the trends in office and industrial property markets. To help enhance the understanding of the supply and demand characteristics of the local employment land market, the views of local property market agents were sought. It was considered more effective and efficient to speak to a group of commercial property agents rather than speaking only to one commercial agent in order to broaden and moderate the response compared to that which would have been received by contacting just one commercial agent.

Consultation with local property agents took the form of a semi-structured interview around topics including: trends across the PMA; the demand and supply of sites and premises, the characteristics of sites and their suitability for employment uses; opportunities and constraints to growth; and inward investment and regeneration. The outputs of the consultation exercise are an important piece of evidence that provides market intelligence from professionals working day to day with commercial property in Braintree District and is a key consideration to inform the policy recommendations.

The exercise supplemented desk-based research and survey findings, and sought to test the emerging findings and conclusions relating to the demand and provision of office and industrial sites and premises in Braintree District.

[63] PPG, paragraph 009 Reference ID: 2a-009-20140306

Office Market

Office Rents in Braintree District

Discussions with commercial property market agents and Zoopla commercial property market search engine has suggested the following rental values applied in the District:

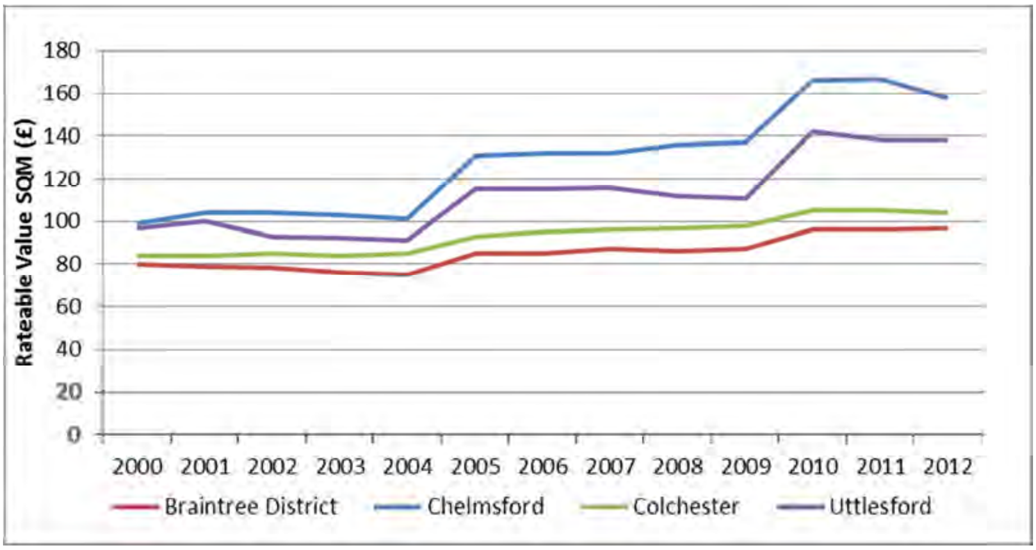
- Significant range in the current rental values of office space;
- Low grade office space in secondary locations: £7.00 sqft (£75 per sqm);
- New office units in prime locations (e.g. town centres): up to £20 per sqft (£215 per sqm), but typically lower.

Rental values suffered as a consequence of the recent recession, although consultations indicate that they are returning to pre-recession levels.

Rateable Values across the PMA

One indicator of the relative performance of commercial property markets are trends in rental values. They indicate the relative cost for a business to locate in different areas across the PMA, while providing an indication of how the balance between supply and demand is evolving over time. **Figure 5-1** below demonstrates the average rateable value[64] of office floorspace for each local authority across the PMA.

Figure 5-1 Rateable Value per SQM of Office Floorspace



Source: Valuations Office Agency (2012)[65]

It demonstrates that Braintree District has the lowest rateable value across the PMA. Although there is a positive trend in the rateable value per sqm of office floorspace across the PMA, the gap between Braintree District and Chelmsford in particular has increased over the period covered by this source (2000-2012). As such office floorspace in Braintree District has become comparatively better value compared to its competitor locations within the PMA. Braintree District may be able to position itself to capture some of the spillovers from other offices markets within the PMA, such as Chemlsford, where consultations indicate that currently space constraints mean demand is anticipated to continue to outstrip supply.

[64] Rateable value represents the rent at which a property might reasonably be expected to let from year on year.

[65] Valuations Office Agency, (2012); Business Floorspace (Experimental Statistics)

Prime Rents across the PMA

The Viability Review of Employment Sites in Braintree District, published in 2012, estimates that prime office rents in the District range between £13-15 per sqft (£140 to £161 per sqm). Comparing this with the information presented in **Figure 5-1** above suggests that prime rents are around 50% higher than the average. According to the Business Space Data Book, which provides values for the end of 2014, this is broadly in line with Colchester (£15 per sqft, £161 per sqm) but well below prime rental values in Chelmsford (£26 per sqft, £280 per sqm). Comparison with

Figure 5-1 indicates that Chelmsford's prime rents are around 75% higher than average rents, which indicates a strong prime office market in the area.

According to market agents and the findings of the research, Braintree District has a relatively small office market, primarily focussed around Braintree and Witham. Offices mainly fulfil localised office demand (e.g. solicitors, local financial services etc.). Large single occupiers are uncommon in the District. These occupiers are more commonly found within Chelmsford and Colchester, which have a greater stock of larger office facilities. Colchester in particular is a more vibrant local competitor, with higher rents linked to the more affluent out of London Essex office market[66].

Witham is seen as the most advantageous location for potential occupiers seeking to locate in the District, with direct access to the A12 making office occupation here a suitable alternative to both Chelmsford and Colchester. Witham also benefits from a quicker and more regular rail service to London than elsewhere in the District. Consultations suggest that Braintree is perceived to have a much greater traffic problem, with rush hour congestion on the A120 a significant deterrent for potential occupiers.

The vast majority of office floorspace in the District is second hand accommodation, with the few larger buildings having been built to accommodate (or with the aim to accommodate) a lone occupier, e.g. financial and business service industries or public sector bodies. A small number of medium to large commercial premises, of good specification, are found within the Witham town centre, enabling some medium-sized enterprises to locate in the District if they wish. Occupiers generally require short leases, with one agent indicating that a typical lease period is in the realm of a three-year terms with a six month break clause. Several consultees suggested that in recent years there has been an increase in demand from smaller sized, mobile companies using the internet as their main platform / tool for business, which are looking for small, flexible workspace with short term leases at affordable prices.

Agents indicate that, while vacancy rates across the District are low, they are to an extent influenced by the low volume of stock. For instance, if a medium-large business or public sector occupier vacates premises then the overall vacancy is impacted to a greater extent than it would be in a larger market.

Industrial

Industrial Rents in Braintree District

For Braintree District specifically, in spring 2015, the availability of industrial premises was estimated at 2%[67] of the total stock. This level is well below the buffer of available space necessary to allow an efficient churn of occupancy, and implies that businesses looking to reconfigure their spatial requirements may be forced to locate elsewhere. Prime rents are in the region of £6 per sqft (£65 per sqm), broadly in line with a recent DTZ report[68] (£5-8 per sqft, £54-86 per sqm), which notes that better quality, newer

[66] However, it is noted that a large investment company has recently relocated from Chelmsford to Witham.

[67] Bidwells, (2015); Business Space Data Book, Spring 2015

[68] DTZ, (2015); Witham Enterprise Centre Feasibility Report

units that are smaller in size (<2,000sqft, 186sqm) are generally more expensive, due in part to demand outstripping supply.

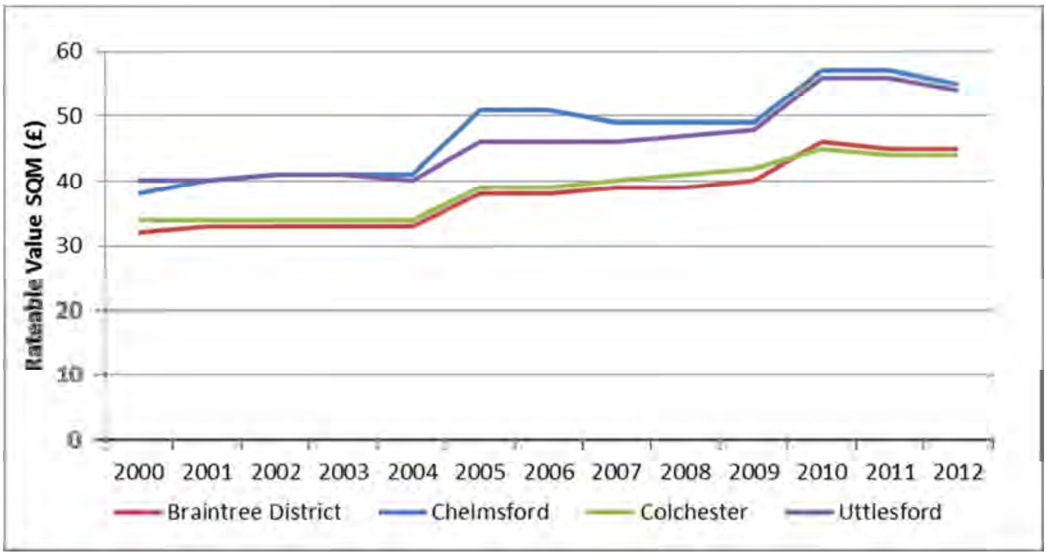
Discussions with commercial property market agents and Zoopla.com has suggested the following rental values currently apply in the District:

- New industrial units at prime locations units (e.g. Skyline 120): £7.00 to £8.00 per sqft (£75 to £86 per sqm);
- Medium sized units (up to 5,000sqft, 465sqm): up to £6.00 per sqft (£65 per sqm);
- Large units including big sheds over 10,000sqft (929sqm): £5.00 per sqft (£54 per sqm); and
- Second hand units: £4.50 to £5.00 per sqft (£48 to £54 per sqm).

Rateable Values across the PMA

Figure 5-2Figure 5-2 indicates the evolving trend in average rateable values of industrial floorspace.

Figure 5-2 Rateable Value per SQM of Industrial Floorspace



Source: Valuations Office Agency (2012)[65]

The figure shows that, as with the office market, there has been a steady increase in the rateable values of industrial floorspace across the period shown. This is likely to reflect both an increase in the value of warehouse space for storage and logistics purposes, and a contraction in demand for traditional manufacturing sites. As with office values, average industrial rents in Braintree District are lower than both Chelmsford and Uttlesford, indicating that the area may be in a position to capture a greater share of the market as businesses look to locate into more affordable areas.

The consultation process indicates that Braintree District has a far more competitive industrial market than offices, with a large stock allowing the District to compete at a regional level. The industrial market is dominated by the Springwood Industrial Estate in Braintree and the Witham Industrial Estates, which are seen as traditional, well-functioning industrial locations with low rates of vacancy. Consultees suggest that the quality of some of the premises within these areas could be classified as legacy employment stock which can offer economic occupation but may fall below the specification and standard expected by modern national and regional operators. Braintree District's industrial areas have seen significant change over the past few years, with an increased emphasis as a logistics location driven by the expansion of London Stansted Airport. There remains a substantial demand for light industrial and manufacturing uses, which are present throughout many of the District's key industrial areas.

The 2015 Business Space Data Book[67] document provides a snapshot of the availability of industrial premises across Essex. It suggests that lower quality second hand stock dominates the supply, with Grade A space representing just 3% of the total built stock in Chelmsford. It also observes a contraction in the availability of industrial floorspace, with availability falling from 17% across Essex in the latter half of 2012 to 8.6% at the end of 2014.

5.4 Demand Projections

Projections of the future demand for employment floorspace are provided by the EEFM[31]. This model projects economic, demographic and housing trends across the East of England to assist strategic decision making. The Greater Essex Demographics Forecasts Report[69] makes the following observations:

- Economic activity rates calculate the number of people either in employment or seeking employment as a proportion of the total population (aged 16-74). The EEFM estimates that economic activity rates will increase from 68.7% (2013) to 71.4% (2031) in Braintree District.
- The unemployment rate is a component of economic activity rate. For Braintree District it is forecast to contract from 3.1% (2013) to 1.7% (2031). The increase in economic activity rates, combined with a reduction in the unemployment rate, implies that a greater proportion of the resident labour force is able to take up the additional jobs estimated by the EEFM forecast.
- The commuting ratio, the balance between the size of the resident population in employment and the number of jobs available in that given area, is estimated to contract from 1.21 (in 2013) to 1.19 (in 2031). The projections therefore anticipate that the District will retain a greater proportion of its residents as employees. However, as the commuting ratio remains over 1, Braintree District is anticipated to continue to be a net exporter of employees to other local authorities.

The EEFM provides a projection of floorspace demand by different space typologies by applying a fixed employment density to the Full Time Equivalent (FTE) employment by use class.

As discussed in **Section 2.4**, the SHMA[6] provides an assessment of the demand for residential development within the District. The SHMA identifies a demand for housing equivalent to 824 dwellings per annum over the Local Plan period up to 2033 (or 14,088 dwellings in total), which exceeds the current housing target of 272 units per year over the same period (or 4,896 homes over the new Local Plan period). The figure of 14,088 dwellings draws upon work undertaken by Edge Analytics[70] which factors in the EEFM

[69] Edge Analytics, (2015); Greater Essex Demographic Forecasts 2013-2037 Phase 7 Main Report

[70] Edge Analytics, (2013); Greater Essex Demographic Forecasts 2013-2037: Phase 4

forecast of employment growth to estimate dwellings per annum. As such the growth of housing anticipated over the Local Plan period is considered to be captured within the EEFM model.

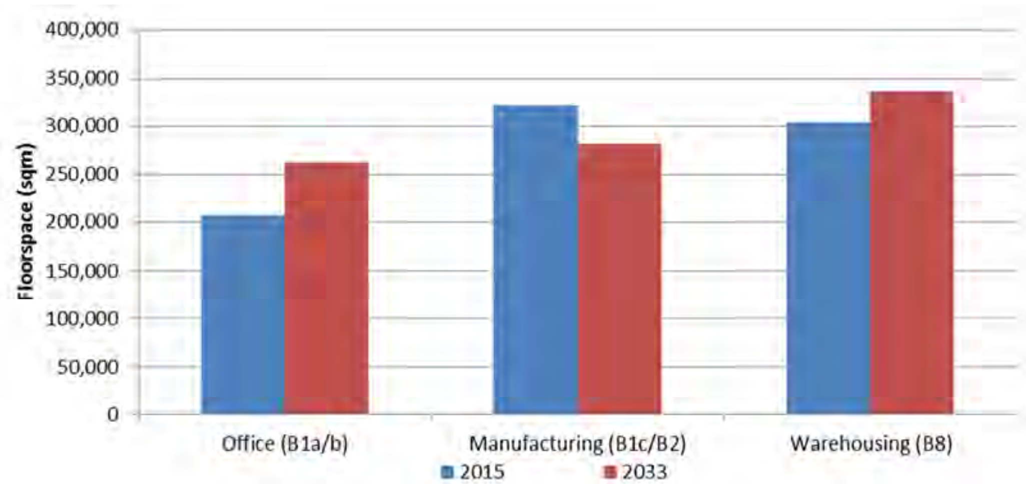
Table 5-1 and **Figure 5-3** outline the projected floorspace demand by space typology across Braintree District and the associated compound annual growth rates (CAGR).

Table 5-1 Projected Floorspace Demand by Use Class

Use Class	*Employment Density (sqm per FTE)*	*2015*	*2033*	*Net Floorspace Demand*	*Braintree District CAGR (%)*	*Rest of PMA CAGR (%)*
Office (B1a/b)	-	206,800	262,300	55,500	*1.3%*	*1.1%*
Of which:						
General Office (B1a)	*14*	*111,700*	*139,600*	*27,900*	*1.2%*	*0.9%*
Business Park (B1a)	*13*	*10,000*	*12,800*	*2,800*	*1.4%*	*1.4%*
Call Centre (B1a)	*10*	*3,600*	*4,600*	*1,000*	*1.4%*	*1.4%*
Research & Development/ Technology (B1b)	*29*	*11,800*	*15,300*	*3,500*	*1.5%*	*1.0%*
Science Park/Small Business Units (B1b)	*32*	*69,700*	*90,000*	*20,300*	*1.4%*	*1.4%*
Industrial (B1c/B2/B8)	-	625,500	618,500	-7,000	-0.1%	0.1%
Of which:						
Manufacturing (B1c/B2)	*36*	*321,400*	*281,700*	*-39,700*	*-0.7%*	*-0.7%*
Warehousing (B8)	*67*	*304,100*	*336,800*	*32,700*	*0.6%*	*0.6%*

Source: Oxford Economics (2015), AECOM calculations. Note the EEFM projects floorspace up to 2031; the compound average growth rate between 2015 and 2031 has been applied to the additional two years to extend the forecast to 2033. Note figures may not sum due to rounding.

Figure 5-3 Change in Floorspace Demand by Use Class



Source: Oxford Economics (2015), AECOM calculations. Note the EEFM projects floorspace up to 2031; the compound average growth rate between 2015 and 2031 has been applied to the additional two years to extend the forecast to 2033.

The EEFM projections show that demand for office floorspace in Braintree District will increase by 55,500sqm up to 2033. Office demand will grow at an average rate of 1.3%

per annum, slightly higher than across the rest of the PMA, equating to a 27% increase overall. The EEFM predicts a higher rate of growth in the demand for general office and Research & Development/Technology floorspace, suggesting that Braintree will capture an increasing share of demand for these typologies across the PMA.

Demand for industrial floorspace is anticipated to experience a relatively small decline. The EEFM model projects that demand for manufacturing floorspace will decline at a rate of 0.7% per annum, which, by 2033, will be 12% lower than current levels. This rate of decline is in line with the rest of the PMA. By contrast, demand for warehousing floorspace is anticipated to grow at a similar magnitude of 0.6% per annum, equating to an 11% increase across the period. However, this is insufficient to offset the decline in manufacturing demand. The net result is a contraction of 7,000sqm of floorspace up to 2033.

5.5 Local Factors and Drivers of Change

There are a number of drivers of economic change which may affect the demand for employment space across the plan period, some of which may not be captured by the EEFM. We present these local factors and drivers of change below.

Dualling of the A120 and Haven Gateway Growth

The A12/A120 Route Based Strategy[71] sets out the current and future capability of this strategically important route. The document suggests that the road will be functioning above capacity by 2021 and will struggle to keep up with demand if plans for growth in the region are realised. It recommends the potential to upgrade the route section of the A120 between Braintree and Marks Tey as a long-term priority, to occur within the next fifteen years. In addition, the widening of the A12 between Chelmsford and Colchester to three lanes has been committed as part of the Roads Investment Strategy[72]. The project is expected to be completed between 2020 to 2022.

Congestion of the road network inhibits the mobility of both goods and the labour force. Consultation with business representatives suggest that congestion on this stretch of road, especially during morning and evening peak hours, acts as a strong deterrent for economic investment. This assertion is compounded by property market insight that has suggested the outlook for demand for employment sites using the A12/A120 Route will decrease as their operation is inhibited by the road which is considered unsuitable for use by HGV vehicles.

The A12/A120 route provides a key strategically important link between Braintree District and the Haven ports. According to the Haven Gateway Partnership[73], in 2008 approximately 37% of the UK's contained throughput went through the Haven ports, in addition to a substantial share of roll-on/roll-off freight. The Spatial Strategy Technical Paper 7[74] to the emerging Tendring District Council Local Plan outlines growth proposals for Harwich International Port. The document suggests that major port expansion is expected to take place at the adjoining 101ha Bathside Bay site, citing improved deep-sea container facilities as a driver of servicing the increased demand for container terminal capacity in the UK. The Port of Felixstowe has also expressed its intention to double its handling capacity of containers.

As outlined in **Section 3.4**, Braintree District has a strong manufacturing base. Although evidence gathered through site surveys and consultation suggests that most of this manufacturing activity supports local market requirements, there is potential for the

[71] Highways Agency, (2013); A12/A120 Route Based Strategy

[72] Department for Transport, (2015); Roads Investment Strategy: for the 2015/16 – 2019/20 Road Period

[73] See: http://www.dryport.org/files/users/Haven%20Gateway%20Logistics%20Information%20Leaflet_163.pdf

[74] Tendring District Council, (2010): Core Strategy and Development Policies Document Technical Paper 7 – Spatial Strategy.

District to capture a greater share of the supply chain linkages associated with growth activities at the Haven ports, around sectors such as renewable energy and off-shore wind farms. Construction of the East Anglia Array, a series of six offshore wind farms in the Anglia region, is likely to boost this key growth sector. However, this opportunity is driven by the District's advantageous location on the strategic road network. Initiatives such as the Low Carbon Freight Dividend[75], a £5.5m project run by the Haven Gateway Partnership designed to encourage containers off the roads and onto the rail network, may hinder the extent to which Braintree District can utilise the linkages to the Haven ports.

Overall, Braintree District could benefit from the buoyancy of commercial activity at Felixstowe and Harwich, with the potential to link with the port activities and grow business to make better use of its proximity. Dualling the A120 would provide resilience and capacity of the A120 itself and the road network in other areas of the District. It would directly increase the mobility of goods and the workforce associated with employment along the A120, such as locations at Braintree and Coggeshall. While all types of employment uses are anticipated to benefit from this investment, the benefits are likely to be most prevalent for warehousing and distribution uses. With the appropriate economic development policies, including supporting marketing and investment, the potential exists to attract inward investment and economic activity to key sites located along the A120[76].

London Stansted Airport

According to a recent report on the Airport, published by Oxford Economics[77], 1,621 (15.8%) of the airport's on-site workforce reside in Braintree, capturing a cumulative £33.9m in wages.

As well as the direct employment of Braintree's resident population, London Stansted Airport is an important catalyst for growth and productivity in the East of England, as outlined by the Sustainable Development Plan[78]. The Airport seeks to maximise utilisation of its existing single runway, after its second runway plans were abandoned, through a redevelopment programme. The scale of change proposed at the Airport offers the prospect of servicing increased customer demands. This may result in demand for just-in-time suppliers in services for customers using the Airport; however services such as catering and maintenance are understood to be centrally provided and there may be limited prospects for local businesses to link in with Stansted's supply chain.

The main driver of economic linkages between London Stansted Airport and Braintree District is through logistics operations. The Airport is the third largest freight airport in the UK, after Heathrow and East Midlands airports. Intelligence gathered through consultation indicates that the airport handles approximately 200,000 tonnes of cargo per annum, with the capacity to double this quantity. However, two factors constrain the growth of freight operations. First, the majority of passenger airlines using the airport tend to be low-cost, and as such have a lesser propensity to carry 'belly' freight. As a consequence, cargo is carried on dedicated flights, which tend to be older and noisier aircraft that fly at off-peak times. Night noise restrictions are identified as a key constraint in the growth of London Stansted Airport's freight market.

[75] See: http://www.lcfd.co.uk/about-the-project/

[76] Infrastructure projects such as the dualling of the A120 and the anticipated investment that it will draw provides an opportunity to increase job density in the District, which is currently lower than at other times in the recent past. According to the ONS, job density (the ratio of workforce jobs to 16-64 population) in the District has fallen from 0.71 in 2002 to 0.62 in 2013, while the rate for the East of England (0.78) has remained the same over this period.

[77] Oxford Economics, (2013); Economic Impact of Stansted Scenarios.

[78] London Stansted Airport (2015): Sustainable Development Plan.

Supply Chain Linkages

Recognising how businesses operate and link together in the supply chain can help foster economic growth. In Braintree District, the sizes of units are typically small to medium and comprised of mostly local and sub-regional occupiers. These industries typically service a local market primarily, although some of the bigger occupiers in Braintree and Witham serve a regional and perhaps national market.

The District's employment function benefits from agglomeration and the clustering of employment uses around its key settlements. This supports local supply chain linkages between small businesses within the District, with the growth in distribution and logistics provision in Braintree likely to continue this trend. This demand for storage and distribution hinges on the key driver of accessibility and the District is ideally situated, in proximity to London Stansted Airport and Harwich International and Felixstowe Ports, to prove attractive to occupiers.

Technological Innovation

Technology is increasingly changing the pattern of work. Access to wireless technology and cloud computing allow information to be accessed from any location. Similarly, video conferencing and web chat technology provide alternatives to traditional face-to-face meetings. The extent to which new technologies are embraced by companies is closely related to size; many smaller companies tend to be more conservative in both their use and understanding of new technologies. However, evidence of the overall impact of technological innovation on employment space is provided by the Employment Densities Guide[79]. This document cites improved communications technology as a driver of the increasing density (i.e. falling space per FTE employee) of office occupations between 2001 and 2010. It is unlikely that this trend can continue indefinitely, and though EEFM projections use a fixed employment density for office floorspace, we do not foresee any significant increases in office workspace density arising over the Local Plan period in the District.

Home Working

Alongside technological innovation, changes in patterns of home working may influence the demand for employment space. Although analysis of trends in Section 3.3 suggests that historic rates of home working are relatively stable in Braintree District, past trends alone may not accurately represent the changing attitudes towards home working by employers. Firms may increasingly seek to encourage remote working in order to reduce their formal desk space, and associated costs. Further, the increasing accessibility and ownership of consumer-owned technology may result in a greater propensity for those employed in the knowledge-based services sector in particular to work from home.

Advances in technology and in particular an expansion in the provision of broadband services across the District, outlined in the Economic Development Prospectus[33], may influence rates of home working. In 2009 the UK Government announced the Universal Service Commitment[80], which aims at ensuring that every household has access to broadband internet. Alongside this, the Superfast Essex Plan (discussed in Section 2.3) outlines specific policies relating to expanding provision across the county.

Homeworking in London[81], published in March 2015, is a useful research piece which discusses the demographics of home-workers. The research pointed to the majority of homeworkers being self-employed, with homeworkers more likely to be employed in part-time work. Senior staff or those in professional/technical occupations were more likely to be homeworkers than lower skilled occupations. In the context of Braintree, the

[79] Homes & Communities Agency, (2010); Employment Densities Guide 2nd Edition

[80] http://www.publications.parliament.uk/pa/cm200910/cmselect/cmbis/72/7206.htm#note16

[81] Greater London Authority, (2015): Homeworking in London Census Information Scheme.

number of its workforce within these occupations is proportionately lower than the average for Essex and nationally.

As home working is a direct substitute to traditional employment, located on B use class land, any increase in home working will negatively impact the demand for employment facilities. It is unlikely that workers will switch completely from locating on employment land to at home; rather, a growth in hot-desking is more likely, with employees splitting their time between work and home locations. Employment densities, the average floorspace required to house each employee, are likely to contract as a result. An increase in home working will therefore reduce the land requirement associated with each additional employee.

Opportunities Arising from Housing Growth

As discussed the 2014 SHMA for Braintree District anticipates a significant increase in the rate of housing delivery across the Local Plan period. This growth is factored in the EEFM. However, there are additional opportunities or knock-on effects as a consequence of housing growth, which could support economic development in the District. As these are only considered as opportunities, and not certainties, they have not been factored into an adjustment in the EEFM forecast.

The growth in housing, and consequential growth in the resident population many of which will be new to the District, will have some influence on demand for jobs and consequently employment space. There will be indirect and induced effects through the business supply chain and an increasing demand for local goods and services, as a consequence of new residents working in the District.

The potential growth in housing represents an opportunity for an expansion in the size of the local economy. The larger pool of labour resulting from this potential step change in housing may provide an opportunity for the District to initiate appropriate policies such as promoting inward investment which could support the uptake of new jobs by residents. So while the EEFM anticipates a slow increase in the proportion of residents who will live and work locally within the District, over the longer term there may be opportunities for policy makers to encourage higher rates of local labour retention.

An increase in resident population, stemming from housing growth, could also provide opportunities to address levels of outcommuting. An increase in the resident population will mean a larger labour force and proportionately more skilled workers. A larger pool of skilled workers could act as a draw for investment and attract relatively higher value added businesses. In turn this could help reduce the wage differential and as a consequence levels of outcommuting. This could result in a more sustainable economy through greater retention of residents as workers. Through supporting business growth and encouraging local supply chain linkages, the step change in housing growth provides an opportunity to encourage local employment and retain a greater degree of local wealth generated by residents.

How Local Factors and Drivers of Change Could Impact on Demand

Table 5-2 presents the combined effects of the local factors and drivers of change to generate demand forecasts. The interaction of local factors and drivers of change on the demand for employment land is highly complex. For the purposes of this study, we consider whether they will bring about an increase in demand (↑), a decrease (↓) or create no overall impact (↔) on EEFM demand projections. To recognise the effect that a local factor or driver of change may have on demand, each factor is assumed to effect the projected demand by +/-10% (as represented by the direction of the arrow). The result of this exercise produces an adjusted forecast.

Table 5-2 Summary of Local Factors and Impact on Synthesis Forecast

Use Class	*Office (B1a/b)*	*Manufacturing (B1c/B2)*	*Warehousing (B8)*
EEFM Projection (Compound Annual Growth Rate)	1.3%	-0.7%	0.6%
Dualling of the A120 and Haven Gateway Growth	↑	↑↑	↑↑
London Stansted Airport	↔	↔	↑
Supply Chain Linkages	↔	↔	↔
Technological Innovation	↔	↔	↔
Home Working	↓	↔	↔
Housing Growth	↔	↔	↔
Adjusted Forecast (CAGR)	1.3%	-0.6%	0.7%

Source: AECOM (2015).Note that figures may not sum due to rounding.

5.6 Other Users of Industrial or Office Land

Waste management and recycling facilities tend to occupy land suitable for industrial employment uses. If there is a requirement for additional such facilities over the planning period, it could impact on the quantum of industrial land available for industrial uses. We therefore consider whether any additional facilities are required to support the population of Braintree District.

The Replacement Waste Local Plan Capacity Gap Report[82], published in September 2014, provides an evidence base for the forthcoming Replacement Waste Local Plan. It provides details of a new Waste Transfer Facility due to become operational in January 2015. As no further additional infrastructure is discussed, it is assumed that no additional land is required for waste management across the plan period. Similarly, we assume that the land requirement for other non-industrial uses that have industrial character and occupy land of an industrial nature, such as transport uses, will not result in a net impact on employment land through the local plan period.

5.7 Growth Scenarios

To account for potential variations in our synthesis of projections based on employment, floorspace and local factors, we introduce high and low growth scenarios to our demand projections +/-10% either side of our adjusted forecast. Our low to high growth scenarios also provide some flexibility to any potential changes in demand (up or down). The impact of some or a combination of development proposals could provide changes in demand in either direction and it is therefore recommended that the Council monitor employment land demand and supply to account for this. The forecast for floorspace demand presented in Table 5-3 apply the adjusted CAGRs stated in

[82] Essex County Council and Southend-on-Sea Borough Council, (2014); Replacement Waste Local Plan: Capacity Gap Report

Table **5-2** above to the current stock of floorspace to estimate the quantity of additional demand.

Table 5-3 Forecast Floorspace Demand by Use Class and Growth Scenario

Demand for Floorspace	*CAGR (%)*	*Low (sqm)*	*Medium (sqm)*	*High (sqm)*
Office (B1a/b)	1.3%	49,400	55,500	61,800
Manufacturing (B1c/B2)	-0.6%	-35,400	-32,200	-29,000
Warehousing (B8)	0.7%	38,800	43,100	47,400

Source: Oxford Economics (2015), AECOM calculations. Figures may not sum due to rounding.

5.8 Summary

We have carried out a quantitative assessment of the demand for office (B1a/b) and industrial (B1c/B2/B8) floorspace in Braintree District. The approach sources the EEFM projection of future floorspace demand by use class, which builds upon past trends to estimate future employment, from which demand for employment floorspace is derived. This projection is then adjusted on the basis of a series of local factors and drivers of economic chance, which consist of trends that are not captured in historic data, and hence are not included in the EEFM projection.

The forecast concludes that over the local plan period demand for office floorspace is likely to increase by between 49,400sqm and 61,800sqm, and for warehousing increase by between 38,800sqm and 47,400sqm. The demand for manufacturing floorspace is however anticipated to decrease though by between -29,000sqm and -35,400sqm.

6 COMPARISON OF SUPPLY AND DEMAND

6.1 Introduction

This section compares the current quantum of employment land in Braintree District, set out in Section 4, with the projected future demand for office floorspace and industrial land the District over the period 2015-2033, as identified in **Section 5**. Broadly, supply in excess of demand suggests a demand constrained position; and where demand is in excess of supply, a supply constrained position with the requirement to identify additional land for B-use employment activities and ensure growth is adequately supported.

6.2 Comparison of Demand and Supply

Forecast for Office Floorspace

Because of the mix of densities of office developed in Braintree District, it is not meaningful to translate floorspace into land requirements. The stock of office is therefore represented in terms of floorspace. The estimate of the net requirements takes account of existing vacancy rates, identified as approximately 8%, and a frictional vacancy rate (8%)[83] (see Section 4.6), the optimum level of surplus capacity in the market at any given time to allow an efficient churn of occupancy.

Table 6-1 Forecast of Net Additional Office Floorspace, 2015-2033

	Office Floorspace	*Low*	*Medium* (sqm)	*High*
A	Current occupied office floorspace		206,800	
B	Current estimated vacant floorspace (8%)		16,500	
C	Demand for office floorspace 2033	49,400	55,500	61,800
D	Optimum frictional vacancy at 2033 (8% of A+C)	20,500	21,000	21,500
E	Deficit of vacant floorspace in 2033 (D–B)	4,000	4,500	5,000
F	Gross requirement for office floorspace 2015-2033 (A+C+E)	260,200	266,800	273,600
G	Net requirement for office floorspace 2015-33 (G-A)	53,400	60,000	66,800

Source: AECOM calculations (2015).

A. Oxford Economics (2015) from EEFM

B. Based on consultation with property market agents and site survey results

Table 6-1 shows up to 2033 there is an additional net requirement for between 53,400sqm and 66,800sqm office floorspace in Braintree District. The most likely scenario is an additional requirement for 60,000sqm, which equates to an average increase of around 3,300sqm per annum. This represents an increase in the rate of provision over what is observed historically, which averaged an additional 2,300sqm of office floorspace per annum between 2000 to 2012[65, 84].

[83] Based on an estimate for frictional floorspace vacancy in office and industrial markets, Greater London Authority (2012) Land for Industry and Transport Supplementary Planning Guidance (SPG).

[84] The ODPM Employment Land Reviews Guidance Note (2004) provides information on plot ratios for B use classes – the ratio of a uses site area to its gross floorspace. Given that office premises may be between one and four storeys in the District there could be a significant variation in an office's plot ratios. It is therefore less appropriate to apply plot a ratio and convert the office floorspace requirement to land requirement. As a broad indication of what land could be required, if we were to apply the ODPM guidance plot ratio of 1:0.25 to 1:0.4 for Business Parks, which is a low plot ratio and therefore provides a higher land demand estimate, there would be a need for between 13.4ha and 26.7ha of land to meet the additional office floorspace requirement.

Forecast for Industrial Land

The PPG states that employment floorspace should be converted to employment land using plot ratios[9]. Development density (plot ratio and storey height) tends to be static for manufacturing and warehousing premises. The ODPM Employment Land Reviews Guidance Note[85] suggests a suitable plot ratio of 1:0.35 to 1:0.45 (land to premises, over one storey) for manufacturing and 1:0.40 to 1:0.60 (land to premises, over one storey) for warehouse uses. This ratio means that over one hectare of land one can typically expect the footprint of a manufacturing or warehouse building to take up 0.4 to 0.5 hectares respectively.

Applying these ratios to the forecast floorspace requirement for industrial uses as set out in **Table 5-3**, we calculate that the additional demand for industrial land is the equivalent of -1.1ha, 0.5ha and 2.2ha for the low, medium and high growth scenarios respectively.

Table 6-2 Land Demand by Industrial Use Class

Demand for Land	*Plot Ratio*	*Low (ha)*	*Medium (ha)*	*High (ha)*
Manufacturing (B1c/B2)	0.4	-8.9	-8.1	-7.3
Warehousing (B8)	0.5	7.8	8.6	9.5
Total	**-**	-1.1	0.5	2.2

Source: Oxford Economics (2015), AECOM calculations.

It is estimated that approximately 297.6ha (97.7%) of the 304.6ha of employment land surveyed is industrial (use classes B1c/B2 and B8)[86]. The demand forecasts set out in **Table 6-3** take into account the demand for wider uses of employment land and the need to retain an appropriate level of vacant or derelict land while sites are prepared for new occupiers (termed 'frictional vacancy')[83].

[85] Office of the Deputy Prime Minister (ODPM), (2004); Employment Land Reviews: Guidance Note.

[86] This estimate takes a precautionary approach in assuming that the stock of industrial land is comprised of the site areas of all Employment Policy Areas, as outlined in **Table 4-1**, excluding Cluster 2 where no employment uses are observed. From total occupied stock we can estimate the optimal frictional land vacancy. In absence of a Braintree specific frictional land vacancy rate, optimal frictional land vacancy in industrial markets is based on the Greater London Authority (2012) Land for Industry and Transport Supplementary Planning Guidance (SPG), which is 5%.

Table 6-3 Forecast Net Additional Industrial Land Demand, 2015-2033

	Industrial Land Use		***Stock (hectares)***	
A	Current supply of occupied industrial land		291.5	
B	Current vacant industrial land (2%)		5.9	
C	Estimated total industrial land (A+B) [87]		297.6	
	Demand Forecast	***Low***	***Medium***	***High***
D	Additional land demand to 2033	-1.1	0.5	2.2
E	Additional demand for waste and recycling facilities, 2015-2033	0.0	0.0	0.0
F	Optimum frictional vacant land at 2033 (5% of A+D+E)	14.5	14.6	14.7
G	Excess vacant land: optimal level of frictional land minus existing vacant industrial land (F-B)	8.5	8.6	8.7
H	Gross requirement for industrial land 2015-2033 (C+D+E+G)	305.1	306.8	308.6
I	***Net Requirement*** for industrial employment land 2015-2033 (H-C)	**7.5**	**9.2**	**11.0**

Source: AECOM calculations (2015).

Note:

A. Not including vacant industrial land but including existing land for utilities, transport and waste management.

B. Estimated by Bidwells to be 2% of total stock (see Section 4.6).

C. This figure has been calculated from Table 4.1 and is the total land in clusters which are designated as Employment Policy Areas.

F. Estimated to be 5% of total stock (see Section 4.6).

I. This requirement takes into account the additional frictional land requirement.

The implication of this analysis is that there is a deficit of employment land in the District in the region of between 7.5ha and 11ha. The median scenario is an additional requirement for 9.2ha of industrial land between 2015 and 2033.

As discussed previously a market should ideally have a degree of vacancy which allows businesses to change their premises and land requirements as they grow or contract. A large proportion of the additional land requirement is a factor of the need to move towards an optimal position of frictional vacancy.

As discussed there are opportunities for the District to improve its skills and qualifications profile, tackle the earning gap between workplace and resident based jobs and reduce out-commuting, which could result in further additional demand for employment land.

[87] This figure differs to the total amount of land in the employment land clusters set out in Table 4.1, as these clusters include land for office space and other non-industrial uses.

7 CONCLUSIONS AND POLICY RECOMMENDATIONS

7.1 Introduction

This section sets out conclusions and recommendations of the ELNA, building upon findings from the previous sections of this report.

Braintree District has a relatively small local economy centred on its three towns: Braintree, Witham and Halstead. The stock of employment land is generally distributed in proximity to these towns, supplemented by a number of smaller sites in rural areas. Manufacturing and distribution (industry) comprise the main employment land activities within Braintree District with a number of geographically segregated and well-functioning dedicated areas of industrial uses. The stock of office provision is significantly small and aimed at supporting local businesses, though there are examples of medium sized businesses operating from purpose built stock.

The District has strong linkages with its surrounding areas: London and the Districts of Chelmsford, Colchester and Uttlesford, both in terms of the movement of people to jobs and businesses supply chain relationships, clients and markets. As a result, the distribution of industrial land is driven by the strategic routes that run through the south of the District. The east-west A120 connects Braintree with London Stansted Airport and the Haven Ports, while Witham lies in proximity to Chelmsford and Colchester on the A12. We have considered the needs of the District within its wider functional economic area, termed a Property Market Area (PMA) which includes the Districts of Chelmsford, Colchester and Uttlesford as well as Braintree.

The Council has aspirations to improve the District's economic profile over the new Local Plan period. A potential driver of change could be the increase in housing provision. New housing will increase the residential population and the pool of local labour. A key question is whether the District could increase its employment base by growing existing businesses and attracting new businesses to provide jobs for new residents and reduce out-commuting. The desire would be to see growth and provision of higher value jobs in the local area which local people could access and benefit from. Additionally, economic activity stimulated by new residents would increase the size of the local economy and could offer an opportunity for regeneration and economic development.

The District has significant aspirations to improve the local economy and benefit residents but it is important to remain realistic with what it can achieve and recognise that there are a range of factors which interact with and drive the local economy that are outside its control. As such we believe the best way to plan for change is to do so by understanding both its past trends and future prospects.

7.2 Conclusions

Office Land Use (B1a/b)

There is approximately 223,300sqm of office floorspace in Braintree District. This is mainly located in the three town centres: Braintree, Witham and Halstead. Witham is the most predominant office location in the District, benefitting from close links to Chelmsford and London. The majority of stock is older in age, although there is some recent evidence of refurbishment to meet the specifications of modern occupiers. Examples of this include Blois Meadow Business Centre, towards the north of the District, and Atlas Works and Hunts Yard in Earls Colne. The large majority of office units are small in size (up to 1,000sqm, 10,764sqft), and only a few examples of larger units are evident. Where larger office units are present, they tend to house one large, standalone occupier. Occupancy levels for smaller units are high, suggesting that SMEs are a strong driver of the District's local economy. The District's office market caters for businesses operating across a local and sub-regional market area, and typical occupiers include architects, accountancy firms, designers, and software companies. There are a limited number of businesses which have moved out from more traditional office locations, such as Chelmsford, although drivers suggest that this trend could strengthen.

Our forecasting exercise estimates that there is additional net demand of between 53,400sqm to 66,800sqm of office floorspace up to 2033. This net requirement takes into account existing levels of vacancy, which, while low, are considered to sufficiently allow an efficient churn of occupancy. The positive forecast for growth in the office market is driven by a number of factors. Demographic change resulting from an ambitious housing provision target is the key driver of this trend. However, the requirements of a typical office occupier are changing. The property market analysis suggests there is increasing demand for serviced and flexible workspace to meet the needs of start-ups and growing businesses, evidenced by the recent application for an enterprise centre at Land Adjacent to Lodge Farm site, Witham. The District will need to expand the provision of more flexible, affordable space in order to fully capture its potential demand.

This result points to growth. There is a need to both retain existing office provision, while finding new space at key locations that are best suited to meeting the needs of small (and some medium-sized) modern businesses. Demand for refurbished units is driven by small occupiers, while larger occupiers, operating at a regional or national level, tend to look across a wider geographical area to find new units that meet high specification requirements. While the forecast for the office market is positive, growth is likely to come in incremental form. The market for office occupancy is slow moving, and market signals suggest that a significant step change is unlikely.

The most suitable location for growth is within the District’s three town centres. These locations offer the access to public transport and good provision of local amenities that are commonly associated with well-functioning, high density employment locations. However, conflicting demands for alternative land uses, and a limited amount of developable space, suggest that town centre locations may not be able to facilitate unmet demand alone. The District has allocated a number of strategic regeneration sites and mixed-use locations that are well positioned to capture additional demand. Many of these are located adjacent or in proximity to competing centres, providing opportunities for growth in the small business sector through expanding the provision of small office stock. It also has a number of large sites in which medium to large-sized occupiers can grow. These sites provide an opportunity to attract inward investment through capturing businesses moving out of more expensive and space-constrained areas, such as Chelmsford and London. The key issue for such occupiers is access; location in proximity to the strategic road network is a strong factor in determining the location of demand.

Industrial Land Use (B1c/B2 and B8)

There is a total of 304.6ha of employment land in Braintree District, of which it is assumed that around 297.6ha of this land is for industrial uses. The majority of industrial land (56.6%) is located at three large industrial areas: Springwood Industrial Estate (Braintree), Witham Industrial Estates and Bluebridge Industrial Estate (Halstead). These industrial areas are located within segregated areas at fringe locations in their respective towns, providing opportunities for local employment. They are generally well functioning, with vacancy observed to be very low. The remaining industrial land is located within either small clusters in proximity to the District’s villages, or at stand-alone rural sites, such as the Gosfield and Earls Colne Airfields. Businesses occupying industrial land in the District tend to engage in manufacturing or small-scale logistics operations, adding value to products along a wider supply chain. Although an important source of local employment, such businesses tend not to provide significant value to the wider local economy.

There are few signs of contraction in industrial occupancy in the three key industrial locations. Vacancy is generally observed to be low at these sites, implying that erosion is more predominant in smaller clusters within marginal locations. However, there is strong evidence of a loss to *sui generis* and other non-industrial activities, such as community and leisure uses. This may fill a gap in industrial demand, providing a functional use to otherwise unoccupied sites. However, it is also likely that a degree of crowding-out may exist, with demand from non-employment occupiers driving out typical occupiers, increasing the demand for employment land. While older in age, the stock of industrial units is generally good. There is some evidence of new provision at key strategic locations, although improvements in quality are most common through refurbishment of existing units. The current supply of industrial premises is generally considered to be appropriate for the needs of occupiers.

Our forecasting exercise estimates that demand for industrial floorspace ranges between 3,400sqm and 18,400sqm to 2033 (manufacturing plus warehousing floorspace demand from **Table 5-3**). This forecast is driven by a contraction in demand for manufacturing (B1c/B2) space, estimated to be -0.6% per annum (estimated at between -29,000sqm and -35,400sqm), and a growth in warehouse (B8) of 0.7% per annum (estimated at between 38,800sqm and 47,400sqm), suggesting the split between these industrial uses is broadly rebalancing towards warehousing.

To derive the net demand we also take account of the supply side position. Existing levels of vacancy is estimated to be approximately 2% (5.9ha). This is below the optimal amount to allow efficient transition between occupiers, constricting the availability of premises that may result in occupiers locating elsewhere in the local PMA. Once vacant industrial land and demand for other uses such as waste, recycling and utilities is taken into account, there is an additional net requirement for between 7.5ha to 11ha of industrial land up to 2033. The majority of this additional requirement captures the need to move towards a more optimal level of vacancy to allow for a more efficient churn of occupancy.

In general, the past decade has seen a sustained period of consolidation of underused industrial land. This is driven by changing patterns in employment, and a continuation of the decline in traditional manufacturing, while demand for housing and associated infrastructure to support population growth places increasing pressure on other land uses. This has resulted in vacant industrial land and buildings being released to non-employment uses where it no longer fulfils the needs of modern businesses. A forthcoming increase in the rate of additional housing provision will place ever increasing pressures for a change of use of industrial sites.

Although there is a net additional requirement for industrial land, the changing nature of demand may have implications for the location of provision. The extent to which warehousing occupiers can move into locations left vacant by a contraction of manufacturing demand is conditioned by the needs of modern occupiers. Within the large quantity of smaller clusters of poorer quality workshop/warehouse space in the District, the interchangeability between manufacturing and warehouse uses implies this may be the case.

However, whereas the current stock of manufacturing units is often found in secondary locations, larger occupiers tend to require higher grade units at key access points. The provision of new, purpose-built stock at locations along good lines of transport may be necessary in order to grow and attract logistics businesses. As a consequence, in order to rebalance demand and ensure there is not an over-designation of employment land, a contraction of the older stock in less well-performing traditional industrial estates may be required.

The District should look to position itself in the best way possible to maximise its share of additional demand for industrial occupancy across the PMA.

7.3 Recommendations

Below we set out our recommendations for the provision of employment land in Braintree District to accommodate the anticipated growth in demand arising over the long term. These recommendations have been developed using the evidence outlined in previous sections of this report.

The District is projected to see a net growth in demand for employment land over the new Local Plan period, both in terms of office space and industrial space. This broadly points to the need to retain existing provision. However our site survey found that not all clusters were performing well. The Council should look to protect and promote new development where appropriate at clusters which are performing well, for example on vacant and derelict land and buildings or through intensification of inefficiently used sites. When considering which clusters to promote the Council should also consider proximity to public transport, links to the strategic road network and access to markets, which allow for more sustainable forms of travel to work, access to amenities, movement of goods and access to markets.

For offices, new provision should focus, where possible, on locations on town centres which provide access to public transport and amenities. There is relatively little vacant employment land in the District and so the Council should look to accommodate office provision on new mixed use development proposals, including on new settlements where feasible. On these sites office could act as act as a buffer or transition between residential and or industrial uses, should the site be large and suitable for a range of B-use classes and other uses.

Given the projected demand for warehousing and contraction in manufacturing, over time, demand for older premises at industrial estates with poor strategic road access and internal circulation is expected to decline as logistics companies favour premises which offer good quality premises with ease of access, journey reliability and proximity to markets. On this basis the Council could consider de-designating some industrial clusters with older, poor grade characteristics that are less suitable for modern occupiers and look to support existing sites with redevelopment potential or new employment floorspace on new large sites with good characteristics, as part of new mixed use development. This could potentially also allow sites which are underused or in low demand to come forward for other uses such as housing.

The recommendations set out below therefore include suggestions for cluster retention, designation and release. A summary of the recommendations are set out in **Table 7-1**.

B1a/b Offices

R1 The demand assessment estimates that, under the medium demand scenario, there will be a net additional requirement for 53,400sqm of B1 floorspace in the District of Braintree over the Local Plan period to 2033.

In order to meet this demand requirement, the Council should support the provision and retention of existing B1a/b use classes across the District and, in addition, promote the provision of new B1a/b use class employment land and premises at suitable locations. These locations are:

- **In the town centres of Braintree, Witham and Halstead, where development opportunities arise and in particular at C10 in Halstead town centre south on land which is vacant or with derelict buildings (though office provision at C10 could come forward as part of a mixed use scheme)**
- **C34, Maltings Lane (Gershwin Park), which is currently being promoted for B1a/b use classes**
- **C31, land to the west of the A131 at Great Notley (Eastlink 120); and**

- **C30, land to the north west off Panfield Lane.**

The provision of new office space should complement existing provision and help to support and encourage a range of businesses to grow and invest in Braintree District from start-up, micro, small to medium sizes businesses, and large businesses too, should interest be received.

In particular there is an opportunity to promote small size office units to accommodate the needs of small sized businesses. This should be affordable flexible business space located in accessible locations with proximity to amenities such as town centres, where there is capacity for new office provision, and/or as part of mixed-use schemes such as C34, Gershwin Park; C31, land to the west of A131 at Great Notley; and C30, land to the north west off Panfield Lane.

We are aware of a planning application to construct an enterprise centre at Land Adjacent to Lodge Farm in Witham (to be called Witham Enterprise Centre). Were this application to be granted, Witham Enterprise Centre [60] would meet part of the additional floorspace requirement for small business flexible office space.

Justification

Analysis of the growth in office stock provision over the past decade, demand forecasting and consultation with commercial property market agents all indicate that demand for office provision will grow.

Demand for office space is expected to be driven by regional economic growth, population change and products and services required by residents, spend and the businesses supply chain.

There is expected to be a net gain in business activity operating within a local property market area which works out of office premises, with existing businesses growing and new businesses setting up. The consequential demand for office space is expected to be grow incrementally rather than by any significant step change.

There is also some evidence of medium sized businesses moving out from competitor locations in the property market area, such as Chelmsford, to accommodate medium sized, purpose build office premises in the District. This movement is driven primarily by may lack of accommodation options and, to a more limited degree cost factors, and though we expect it to continue over time we do not anticipate it to be the main driver of demand: the demand for small office space is expected to be stronger. Infrastructure improvements (dual carriage way on the A120, which would bring about greater capacity and reliability, and expansion of broadband throughout the District) could enhance the District's appeal attract businesses looking to relocate. The provision of medium sized office space in Braintree is at present limited. Demand would therefore be best accommodated by new premises delivered on mixed regeneration sites.

There are a number of locations which could accommodate this forecast demand:

- Cluster C10 is located to the south of Halstead town centre. The cluster is in a state of transition and the area of vacant land and derelict buildings measures 1.8ha (approx. 45% of the cluster's area). The cluster has potential for office development as part of a mixed use scheme which could help meet the net additional floorspace demand. Under R3 we recommend that C10 is designated for mixed use redevelopment. C9, (Broton Drive Industrial Area, Halstead) is also located within Halstead Town Centre. Though it has vacant land the cluster is more industrial in character and considered less suitable for office provision. The cluster lies within a flood risk zone of 2 and 3, which means that mitigation could be required ahead of development.

- In addition to C10, there may be some opportunities, though limited, to accommodate small office space demand in the town centres of Braintree, Witham and Halstead where new development opportunities arise, for example at locations on the high street and above shops. These windfall opportunities should be supported as they would improve the utilisation of commercial floorspace in town centres and add to their vitality.

- Land which is currently being promoted for new B1a/b use classes includes C34 (The Maltings, Gershwin Park), the Witham Enterprise Centre (on Land Adjacent to Lodge Farm) and the strategic sites at C31 and C30 (land to the west of the A131 at Great Notley and land to the north west off Panfield Lane respectively). These clusters offer significant potential for new office provision for small and medium sized businesses, well in excess of the net additional requirement: Gershwin Park has 3.8ha promoted for B1a/b use classes; and of B1a/b use classes could be promoted on strategic sites C31 (land to the west of the A131 at Great Notley), which in total measures 39.6ha or C30 (land to the north west off Panfield Lane), which is of comparable size at 45.6ha.

These clusters are in various locations, including the southern part of the District which has good access to the strategic road network and better links to larger population centres in the region, and offer the potential to accommodate the projected net demand for B1a/b floorspace arising over the local plan period to 2033.

There is evidence of demand for small office space illustrated by the high utilisation of this accommodation observed during site surveys. Premises which provide small office space were observed to be functioning well and had low vacancy. Examples include Threshelfords Business Park in Feering, Atlas Work and Hunts Yard in Earls Colne, Blois Meadow Business Park at Steeple Bumpstead. These premises are located both in town centres and rural locations. There is evidence of market demand with 'The Business Centre' at Earls Colne expanding and Blois Meadow Park's ambition to increase provision (the planning application was rejected by the Council due to flood risk issues). Small office space which offer support facilities, flexible leasing arrangements at affordable rates would help support entrepreneurs and start-ups grow their business ideas. Flexible small office accommodation would also provide accommodation and opportunities for those working from home to test their business ideas further.

R2 To support the provision of office space at C34, Malting Lane Business Park (Gershwin Park), as set out in R1 above, the Council should continue to designate land as a Business Uses area and promote 3.8ha of the cluster for office provision.

Justification

We agree with the Council's Pre Submission Site Allocations document which designates Malting Lane Business Park, Gershwin Park (C34), as a Business Uses area. By designating a proportion of the cluster as an area Business Uses area for office provision as part of the Local Plan, the Council would be supporting the areas ambition to provide office premises and create a mixed use development alongside residential, community, leisure and retail uses.

The area of land in C34 which is being promoted by the developer for B1a/b use classes is 3.8ha. By supporting office provision on this cluster the Council would be giving support to the scheme to accommodate office activities and help plan strategically to meet the net additional demand for B1a/b use class provision arising over the long term.

R3 The Council should consider re-designating C10, Halstead Town Centre South as a mixed-use cluster. Proposals for redevelopment should be either compatible with the operations of existing industrial businesses or ensure that the 2.2ha of land which currently supports B-use class business activities is re-provided on site or elsewhere in the District. The mixed uses designation should allow redevelopment for industrial, office, retail, leisure and residential uses.

Justification

Cluster C10 is located to the south of Halstead town centre. Over the past few years the cluster has lost a number of industrial uses and currently has 1.8ha of vacant land and land with derelict buildings, leaving 2.2ha of land in the cluster which is activity being used at present. In terms of character and location, the cluster is close proximity to Halstead Town Centre and residential uses lying adjacent which adds to the relatively high footfall and vehicular movements compared with other industrial clusters; it has indirect access to the strategic road network; and the quality of the public realm is considered to be poor, though those buildings in use are of average quality. On the western boundary there is an expression of interest by a high-street retailer in taking up a site. As such the cluster is considered a less suitable location for industrial uses, though efforts should be made to retain existing industrial businesses on site which value the location.

The site is considered suitable for a mixed use scheme which includes office provision, subject to environmental concerns[88]. Although the office market in Halstead has traditionally been smaller than other town centres in the District, this site benefits from good access to amenities due to its town centre location, and though there is no rail station, it has good access to other forms of public transport (bus) and the strategic road network via A131, which joins the A120. Provision of office space at C10 would contribute to the net additional floorspace requirement for office space over the Local Plan period.

Were development proposals not to include office floorspace we suggest the applicant demonstrate and provide evidence that there is insufficient commercial interest in the site, both currently and in the future, for office provision; that there had been a due process of effective marketing of the site; and illustrate any viability constraints regarding the provision of office space.

B1c/2 and B8 Use Classes

R4 To support the requirement for a net additional 9.2ha (medium scenario) of land for industrial uses over the plan period to 2033, the Council should support development of clusters which are currently functioning well as employment locations which have vacant land, land with derelict buildings or have underutilised land and premises. These locations are:

- **C9, Broton Drive Industrial Area, Halstead**
- **C13, Riverside Business Park, Earls Colne**
- **C15, Springwood Industrial Estate**
- **C18, Skyline 120[89]**
- **C19d, Braintree Town Centre; and**
- **C26, Eastways, Witham Industrial Estate.**

In addition, to ensure occupiers have a range of locations to choose from the Council should promote and encourage development at new sites which display good strategic characteristics and potential for industrial use. These new sites could include:

[88] This site is in Flood Zone 2 and 3 (Environment Agency).

[89] However, it is noted that the Council has received a recent planning application as this site (15/00582/FUL). Were it to be successful, Skyline 120 would no longer provide prospects for additional development for employment uses.

- **Call for sites RIVE362 and RIVE363 adjacent to C26 (Eastways, Witham Industrial Estate)**
- **Call for sites GOSF249, adjacent to C8 (Gosfield Airfield)**
- **Call for sites BOCS138 and BOCS141 adjacent to and overlapping with C15 (Springwood Industrial Estate), and PANF136 adjacent to C30 (Land to the North West off Panfield Lane)**
- **Call for sites COLE188, HASA288 or GGHR282 which are adjacent to C11 (Bluebridge Industrial Estate); and**
- **Call for sites EARC226 which is adjacent to C14 (Earls Colne Airfield).**

There is also an opportunity to promote flexible and small size workspace units to accommodate the needs of business start-up and small size businesses. Affordable and flexible business space should be promoted as part of sites, where there is capacity, and as part of mixed-use schemes.

Justification

There is a net additional requirement for 9.7ha (medium scenario) of land for industrial uses over the plan period to 2033. This demand includes increases in business activity stemming from economic growth, employment and demographic change.

There is evidence of additional demand for small and medium sized businesses, which could be met by a number of locations, subject to further assessment:

- The clusters of C9 (Broton Drive Industrial Area, Halstead), C13 (Riverside Business Park, Earls Colne), C15 (Springwood Industrial Estate) and C26 (Eastways, Witham Industrial Estates) have collectively approximately 4.9ha of vacant industrial land, so could meet approximately half of the net demand required over the plan period. These clusters are generally well performing and have estates dedicated for industrial activities. If these sites are in demand by the market, the Council should encourage their development. From this list of clusters C9, in particular, would be appropriate at providing B1c/B2 and B8 workspace for small manufacturing or logistics businesses.
- Cluster C19d in Braintree town centre (off Anglia Way) is a wholesale market which is located in a highly accessible, industrial location but is currently underutilised. The site offers B1c/B2 use class space but the premises were observed to be of poor grade with signs of vacancy. The ratio of building footprint to site area is high however so redevelopment would not provide any significant net increase in built on stock.
- In terms of meeting the provision of medium and larger occupiers, land at C8 (Gosfield Airfield) could be expanded into the adjacent call for sites area GOSF249. C8 is in a rural setting, with a large amount of land that could accommodate requirements of industrial activities which require large sites (currently being used for portacabin manufacture and transporter trailers for lorries to move vehicles). The area of GOSF249 is 21.4ha, so expansion into this call for sites area could alone adequately accommodate the net additional demand, which has been projected.
- Other sites with significant potential to cater for industrial land demand include Cluster C29, Land to the North West off Panfield Lane, and call for sites which lie adjacent to existing well-functioning industrial locations namely: call for sites RIVE362 and RIVE363 adjacent to cluster C26, Witham Industrial Estate; BOCS138, BOCS141 and PANF136 located adjacent to cluster C15, Springwood Industrial Estate; COLE188, HASA288 and GGHR282, which lie adjacent to C11b; and EARC226 which lies adjacent to C14.

C32 Silver End Regeneration site is, on balance, not considered to have good characteristics which would suit redevelopment for B use classes. Being located within a residential area the cluster is considered be more suitable for uses which co-exist and support residential such as community, retail and leisure activities. The existing residential character of the location would restrict the type of industrial business activities possible on site and potentially limit market interest.

In aggregate the total developable area of land at the sites listed above is significantly more than the net additional land requirement for industrial uses, but it is anticipated that a large proportion of these sites would be required to support other use classes, such as residential, retail and leisure. The Council needs to promote development opportunities at a range of sites but also keep development focussed on those sites which are more marketable, offer better levels of development viability and can be delivered as part of a wider integrated masterplan. Development of land for industrial uses should be captured as part of monitoring process.

R5 To support the net additional growth of industrial space as set out in R4 above, the Council could consider designating a proportion of the following Call for Sites for industrial B1c/2 and B8 use class activities:

- **Call for sites RIVE362 and RIVE363 adjacent to C26 (Eastways, Witham Industrial Estate)**
- **Call for sites GOSF249, adjacent to C8 (Gosfield Airfield)**
- **Call for sites BOCS138 and 141 adjacent to and overlapping with C15 (Springwood Industrial Estate), and PANF136 adjacent to C30 (Land to the North West off Panfield Lane)**
- **Call for sites COLE188, HASA288 or GGHR282 which are adjacent to C11 (Bluebridge Industrial Estate); and**
- **Call for sites EARC226 which is adjacent to C14 (Earls Colne Airfield).**

Justification

The call for sites listed above represent locations adjacent to existing clusters which support manufacturing and logistics uses. Given the tight market conditions (low vacancy) and relatively few opportunities to intensify provision on clusters with characteristics able to support modern occupiers, there is a need to find additional land. A number of call for sites are located adjacent to existing clusters which are performing well as locations for manufacturing and logistics.

In promoting a number of sites with capacity in excess of the net B1c/B2 and B8 demand arising, there is a danger that development could become dispersed. The Council should therefore promote and encourage incremental growth of B8 provision (and B1c/B2 use classes if required) into these areas immediately adjacent to existing sites and in a way which is sustainable and sensitive to the surrounding context of uses. Ideally development would be part of a wider masterplan vision of the site. Alternatively the Council may wish to promote a shortened list of call for sites in order to focus new provision geographically, for instance GOF249 and on call for sites adjacent to C15 or C14.

R6 A number of clusters are not performing well or are judged to be less suitable for use as industrial locations. The Council could de-designate the following Employment Land Areas:

- **C2, Slate Hall Farm, Helions Bumpstead**
- **C4, Greenfields Creation, Ridgewell**
- **C5, Hunnable Industrial Estate, Great Yeldham**

- **C6, Former Tanner's Dairy, Oxford Lane, Sible Hedingham**
- **C16, Broomhills Industrial Estate**
- **C17, Bovington Road, Bocking Churchstreet; and**
- **C24, Kelvedon Railway Station.**

Justification

Within the aggregated net demand figure of 9.8ha over the local plan period is a contraction in manufacturing which is offset by a stronger growth, in terms of land requirement, by logistics businesses for warehousing. Local businesses involved in manufacturing are expected to consolidate further on existing, dedicated industrial estates across the District. Demand for land and premises by companies involved in distribution is expected to grow however. Their demand is likely to focus on sites with good access to the strategic road network, characteristics which support modern logistics companies such as good internal circulation/turning space for HGVs and lorries, good quality premises and good quality public realm and environment. The clusters listed above from C2 to C24 do not display these features. They are generally located away from the strategic road network and have poor quality environments and premises and are less viable for redevelopment as an industrial location. It is anticipated that if these clusters were no longer designated then the market would over time bring about other higher value development on these sites, such as residential.

We note that C24 includes land for transport: a bus depot, which is well located alongside Kelvedon railway station. Should the Council consider it difficult to find an appropriate site for this bus depot, the depot could be retained and the rest of the employment land cluster de-designated.

These clusters measure 14.9ha. The de-designation of 14.0ha industrial land and the net additional requirement for 9.2ha of industrial land over the plan period equates to the need for 23.2ha of land to accommodate growth. The need for 23.3ha of industrial land could be easily met by existing capacity in designated and non-designated employment land (through intensification), on Strategic and Mixed Use clusters and on call for sites, as listed in R4 and R5.

R7 Monitoring: The Council should monitor changes of employment land through planning permissions to ensure that sufficient land is available for economic growth over the planned period, 2015 to 2033.

Justification

It is important that appropriate and sufficient monitoring mechanisms are embedded within the plan making process in order to record the change in employment land available for economic growth.

The aim of the monitoring of employment land is to ensure that overall an approximate quantum of appropriate employment land supply is retained in the District to meet the level of projected demand indicated in this study. It should inform the Council on where too little land or premises is being provided or too much is being provided. As discussed in **Section 4.9**, *sui generis* and other non-B use class activities were observed in many of the District's employment locations. The Council should promote and encourage B-use class activities at locations designated for employment where possible. The monitoring process should capture information on non-B use activity as this can be an indicator of the industrial / office's commercial market's interest in a location, and would help plan for sufficient space to be available for B use occupiers, while protecting against residential developments on brownfield sites encouraged by LDOs.

The recommendations have put forward a number of large sites with capacity which significantly exceeds the net additional industrial land requirement so it will be important to assess on an ongoing basis whether development is being held back, or that development is proceeding in an ad hoc dispersed manner due to over provision and lack of a coherent vision. The PPG states that the employment land reviews should be updated roughly every five years[90]. However in the periods in between employment land reviews the Council should regularly review how much employment land has been lost or gained. The Annual Monitoring Report is likely to be the most appropriate framework for this monitoring and review exercise.

Table 7-1 Summary of Report Recommendations per Sub-Cluster

Cluster	*Sub-Cluster*	*Employment Area / Cluster Name*	*Existing Policy Designation*	*ELNA Recommendation*	*Net Change in Employment Land (ha)*
Sites with Existing Employment Land Designations or Non-Designated					
C1	a	Sturmer Industrial Areas	Employment Policy Area	Retain	0.0
C1	b	Sturmer Industrial Areas	Employment Policy Area	Retain	0.0
C2	-	Slate Hall Farm, Helions Bumpstead	Employment Policy Area	De-designate	0.0
C3	-	Blois Meadow Business Centre	Business Uses	Retain	0.0
C4	-	Greenfield Creations, Ridgewell	Employment Policy Area	De-designate	-0.6
C5	-	Hunnable Industrial Estate, Great Yeldham	Employment Policy Area	De-designate	-4.7
C6	-	Former Tanner's Dairy, Oxford Lane, Sible Hedingham	Employment Policy Area	De-designate	-2.0
C7	a	Rippers Court, Sible Hedingham	Employment Policy Area	Retain	0.0
C7	b	Rippers Court, Sible Hedingham	Employment Policy Area	Retain	0.0
C7	c	Rippers Court, Sible Hedingham	Employment Policy Area	Retain	0.0
C8	-	Gosfield Airfield	Employment Policy Area	Retain	0.0
C9	-	Broton Drive Industrial Area, Halstead	Employment Policy Area	Retain	0.0
C10	-	Halstead Town Centre South	Employment Policy Area	Re-designate as Mixed Use	-2.0 (see note A)
C11	a	Bluebridge Industrial Estate	Employment Policy Area	Retain	0.0
C11	b	Bluebridge Industrial Estate	Employment Policy Area	Retain	0.0
C12	a	Atlas Works, Earls Colne	Employment Policy Area	Retain	0.0
C12	b	Atlas Works, Earls Colne	Employment Policy Area	Retain	0.0
C13	-	Riverside Business Park, Earls Colne	Employment Policy Area	Retain	0.0
C14	-	Earls Colne Airfield	Employment Policy Area	Retain	0.0
C15	-	Springwood Industrial Estate	Employment Policy Area	Retain	0.0

[90] PPG, paragraph 037 reference ID: 2a-037-20140306

Cluster	Sub-Cluster	Employment Area / Cluster Name	Existing Policy Designation	ELNA Recommendation	Net Change in Employment Land (ha)
C16	-	Broomhills Industrial Estate	Employment Policy Area	De-designate	-2.9
C17	-	Bovingdon Road, Bocking Churchstreet	Employment Policy Area	De-designate	-0.7
C18	-	Skyline 120	Employment Policy Area	Retain	0.0
C19	a	Braintree Town	Employment Policy Area	Retain	0.0
C19	b	Braintree Town	Employment Policy Area	Retain	0.0
C19	c	Braintree Town	Employment Policy Area	Retain	0.0
C19	d	Braintree Town	Employment Policy Area	Retain	0.0
C19	e	Braintree Town	Employment Policy Area	Retain	0.0
C19	f	Braintree Town	Employment Policy Area	Retain	0.0
C20	-	Former Polish Campsite	Employment Policy Area	Retain	0.0
C21	-	Coggeshall Industrial Area	Employment Policy Area	Retain	0.0
C22	-	Threshelfords Business Park, Feering	Business Uses	Retain	0.0
C23	-	London Road, Kelvedon	Employment Policy Area	Retain	0.0
C24	-	Kelvedon Railway Station	Employment Policy Area	De-designate	-2.2
C25	-	Arla Factory, Hatfield Peverel	Employment Policy Area	Retain	0.0
C26	-	Eastways, Witham Industrial Estate	Employment Policy Area	Retain	0.0
C27	-	Freebournes, Witham Industrial Estate	Employment Policy Area	Retain	0.0
C28	a	Witham Town Centre	Business Uses	Retain	0.0
C28	b	Witham Town Centre	Business Uses	Retain	0.0
C28	c	Witham Town Centre	Business Uses	Retain	0.0
C28	d	Witham Town Centre	Business Uses	Retain	0.0
C29	-	Lynderswood Farm	Non-designated	Continue as non-designated	0.0
Strategic and Mixed Use Clusters					
C30	-	Land to the North-West off Panfield Lane	Strategic Site	Part designate as Employment Policy Area	+7.5[91]
C31	-	Land to the west of the A131 at Great Notley (Eastlink 120)	Strategic Site	Designate as Employment Policy Area	+18.5
C32	-	Premdor/Rockways	Mixed Use	No change	0.0

[91] We assume that half of the total land allocated for employment uses (15ha) is taken up by sports use, as discussed in the North West Braintree Masterplan (See **Section 2.4**).

Cluster	***Sub-Cluster***	***Employment Area / Cluster Name***	***Existing Policy Designation***	***ELNA Recommendation***	***Net Change in Employment Land (ha)***
		Regeneration Site	Regeneration Site		
C33	-	Silver End Regeneration Site	Mixed Use Regeneration Site	De-designate	0.0
C34	-	Maltings Lane Business Park (Gershwin Park)	None	Retain designation for Business Uses	+3.8
Call for Sites: Council to consider designating a proportion of the following sites for B1c/2/8 uses:					
RIVE362		Adjacent to C26		Designate for B1c/B2/B8 use class	+3.0ha
RIVE363		Adjacent to C26		Designate for B1c/B2/B8 use class	+6.9ha
GOSF249		Adjacent to C8		Designate for B1c/B2/B8 use class/ mixed use	proportion of +21.4ha
BOCS138		Adjacent to C15		Designate for B1c/B2/B8 use class/ mixed use	proportion of +3.7ha
PANF136		Adjacent to C15		Part designate for B1c/B2/B8 use class/ mixed use	proportion of +7.9ha
COLE188 HASA288 GGHR 282		Adjacent to C11		Part designate for B1c/B2/B8 use class/ mixed use	proportion of +32.3ha
EARC226		Adjacent to C14		Designate for B1c/B2/B8 use class/ mixed use	proportion of +6.7ha
Total	**-**	**-**	**-**	**-**	**+14.7ha to +96.6ha** (see note B)

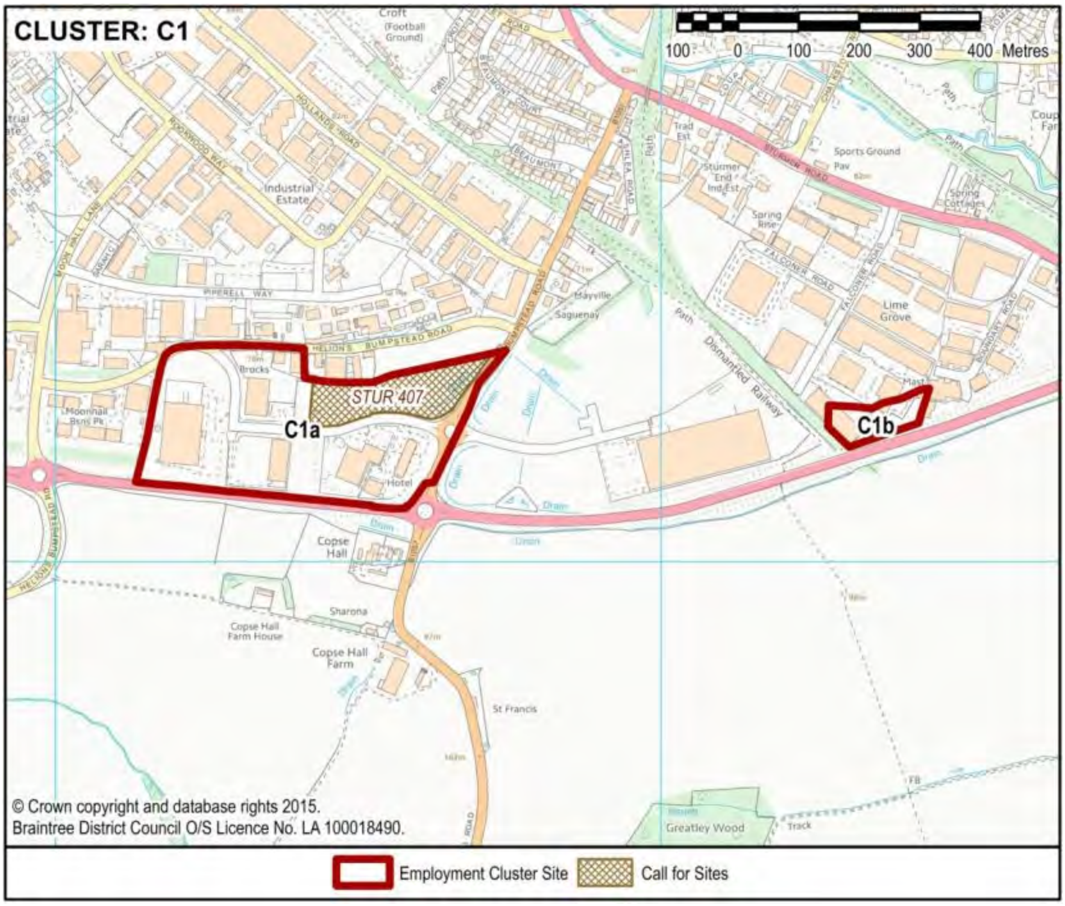
Notes:

A: For the purposes of the table and analysis we have assumed that mixed use redevelopment would amount to half of the cluster's area being lost to non-B use classes.

B: Depends on the proportion of land designated for B use class provision in the call for sites. The values given here provide a range of B use class land: 14.7ha assumes that no B use class development come forward on call for sites (in which case land provision is as per the total land from 'Sites with Existing Employment Land Designations or Non-Designated' plus 'Strategic and Mixed Use Clusters'); and 96.6 ha assumes that all land on call for sites is used for B uses in addition to the total land from 'Sites with Existing Employment Land Designations or Non-Designated' plus 'Strategic and Mixed Use Clusters'.

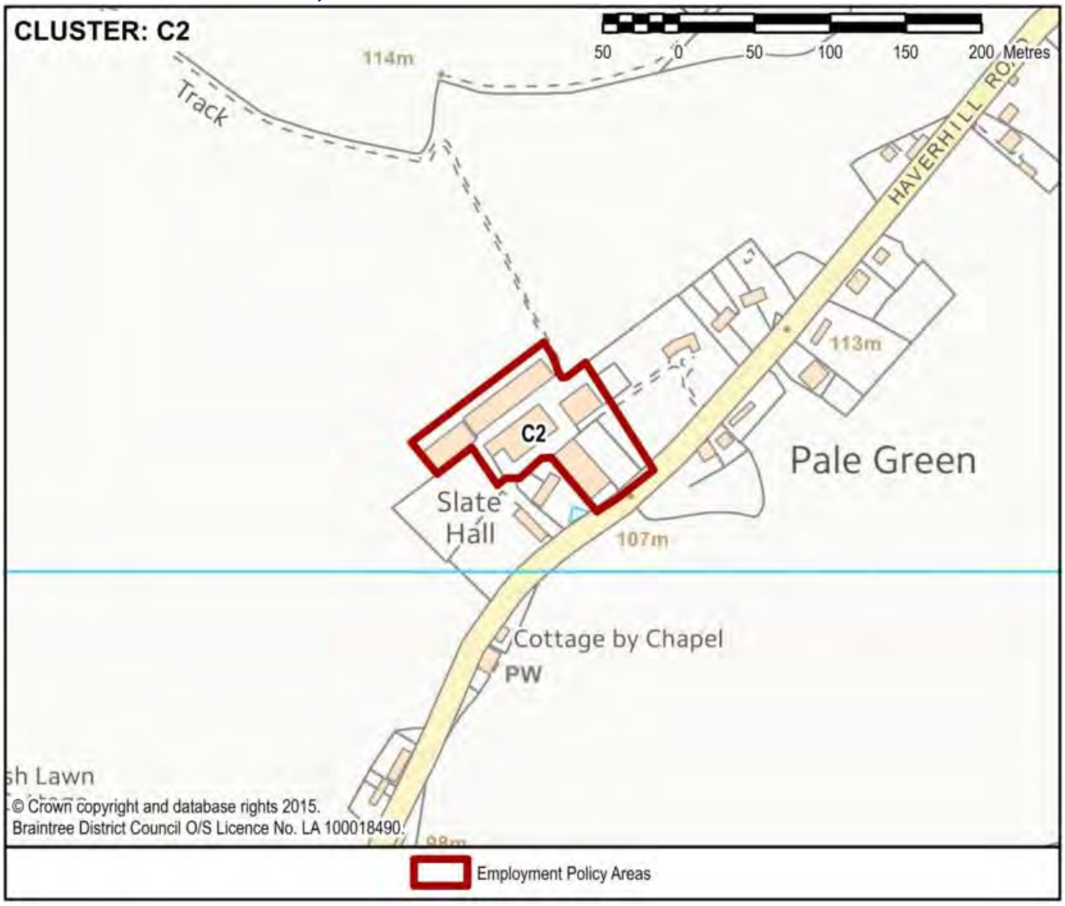
APPENDIX A: SUMMARY OF CLUSTERS

C1 – STURMER INDUSTRIAL AREAS



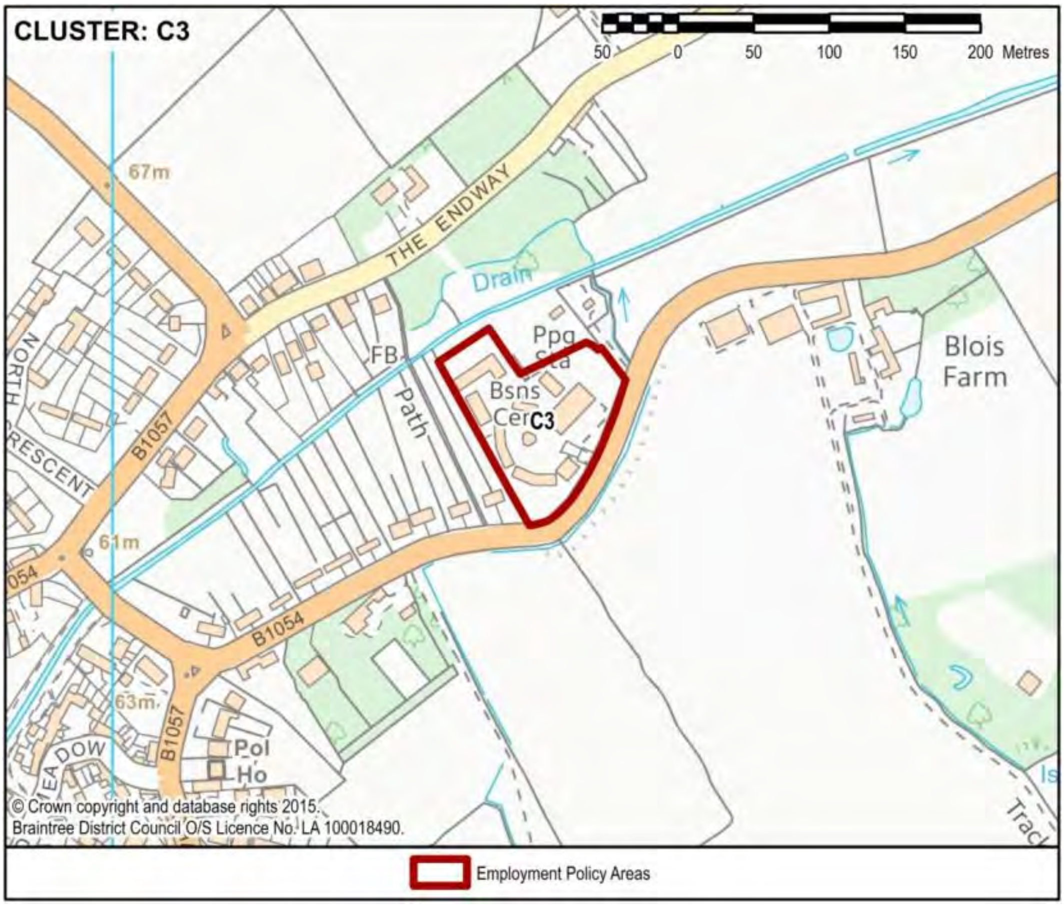
Summary and Key Characteristics	
Business uses: Warehouse/distribution park. Unit typologies: Large warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Very good. Conditions of buildings: Very good/good. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: None. Bad neighbourhood uses: HGV traffic. Physical site constraints: Constrained by A1017 to the south.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: No, dominated by large units. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	C1a – retain as Employment Policy Area. C1b – retain as Employment Policy Area.

C2 – SLATE HALL FARM, HELIONS BUMPSTEAD



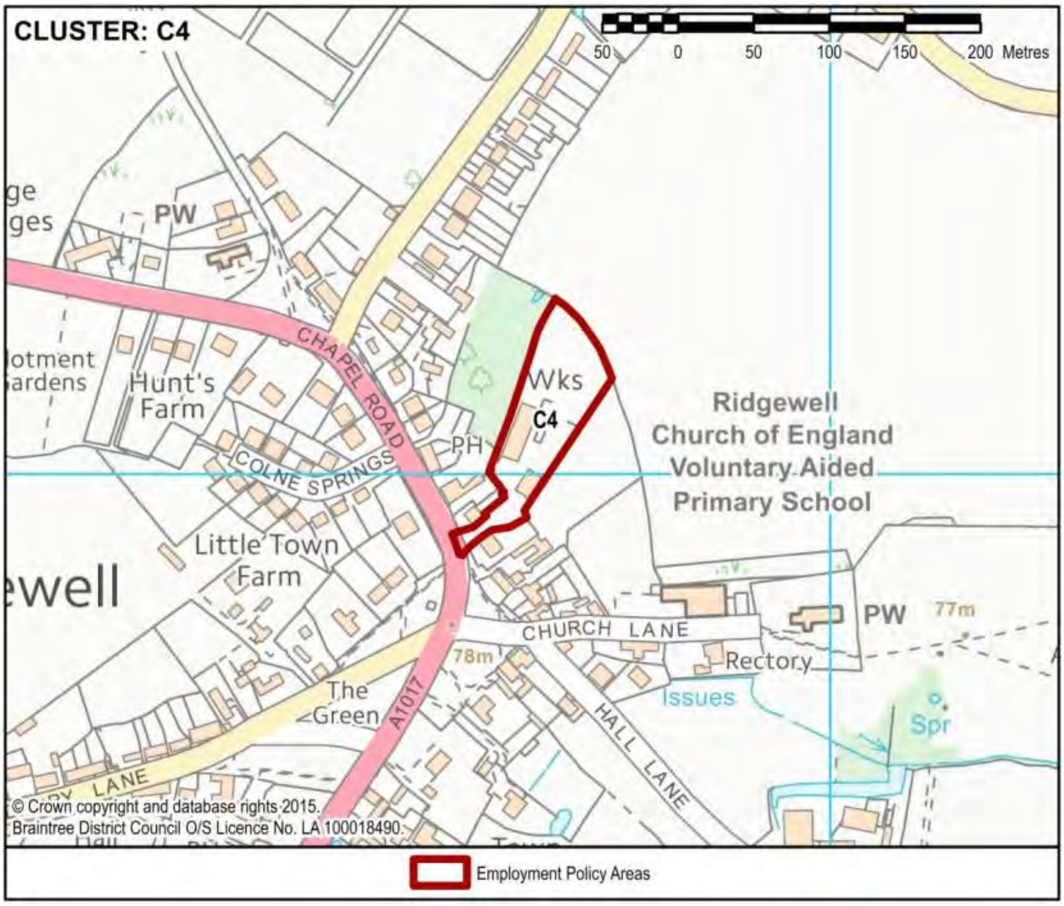
Summary and Key Characteristics	
Business uses: Other. Unit typologies: Other (farm).	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Poor. Vacant and available floorspace: N/A.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: None.
Parking and servicing	Parking facilities: On street parking. Parking provision: Adequate. Servicing of businesses: None. Provision of Servicing: N/A.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: Waste management/recycling, Utilities. Possibility for intensification/ redevelopment: Yes, whole site. Possibility for estate management: None.
ELNA Recommendation	C2 – De-designate

C3 – BLOIS MEADOW BUSINESS CENTRE



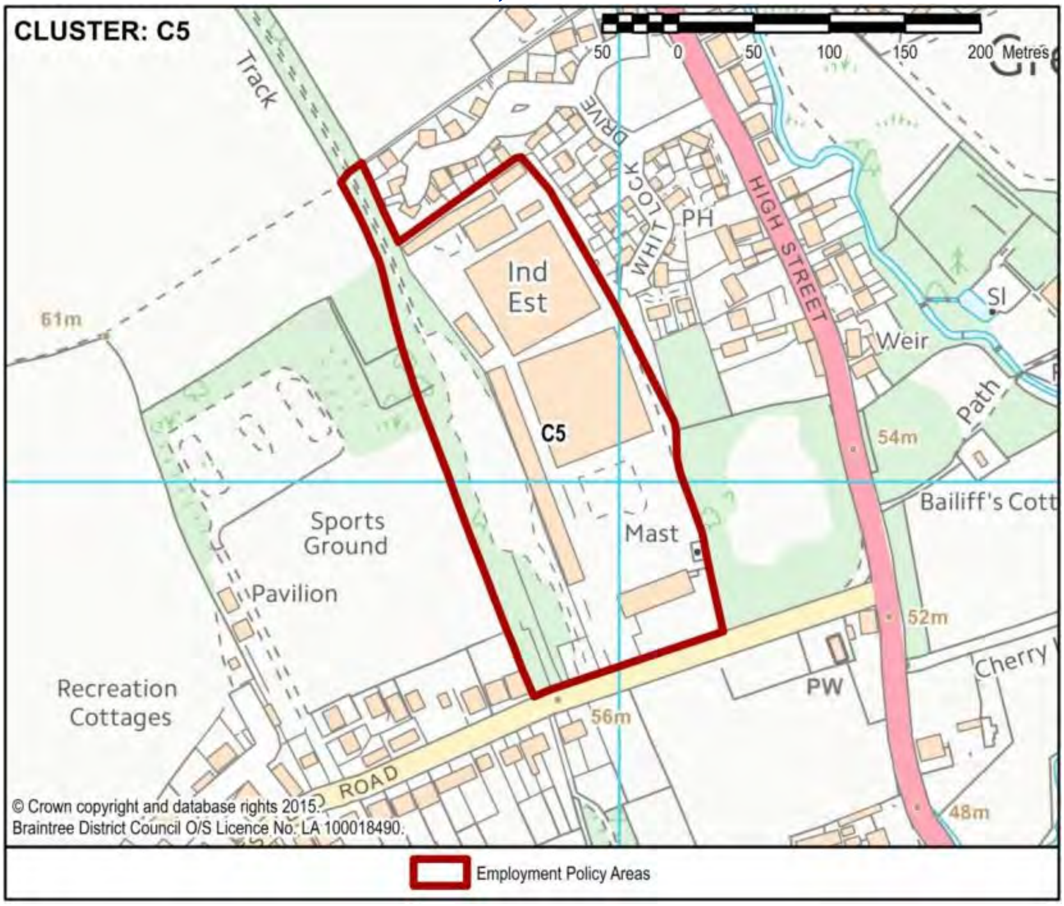
Summary and Key Characteristics	
Business uses: Start-up/small business cluster. Unit typologies: Small office space.	
Cluster quality and vacancy	Quality of environment / public realm: Very good, extremely well kept at the front of the site. Conditions of buildings: Good. Vacant and available floorspace: Low.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained by river to north of site.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Too little. Servicing of businesses: Road side. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: Small vacant area to the edge of cluster that could be developed. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: No. Presence of high growth sector occupiers: Yes, evidence of technology companies.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	Retain for Business Uses.

C4 – GREENFIELD CREATIONS RIDGEWELL



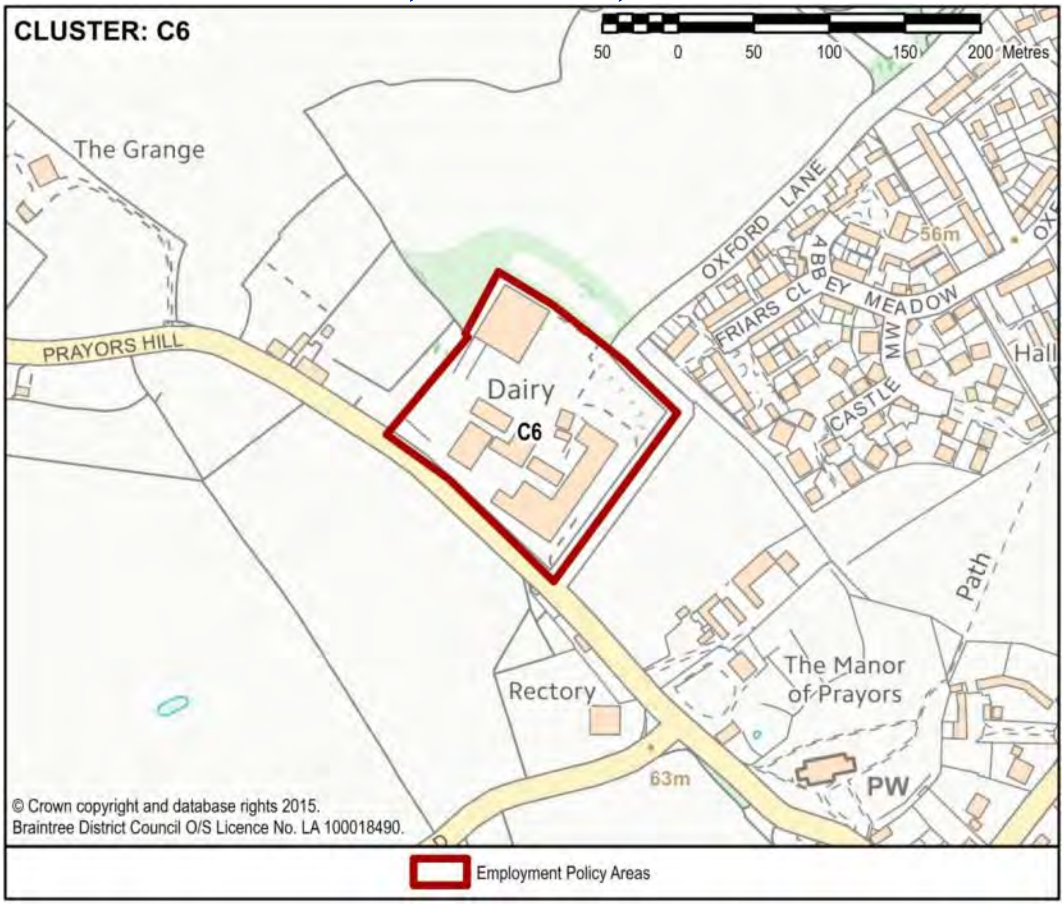
Summary and Key Characteristics	
Business uses: General industrial estate. Unit typologies: Medium-sized warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Poor. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained by farm land to the north, poor layout for HGV access.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: Yes, a large vacant area to the north of the site. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Yes, whole site. Possibility for estate management: Yes.
ELNA Recommendation	De-designate

C5 – HUNNABLE INDUSTRIAL ESTATE, GREAT YELDHAM



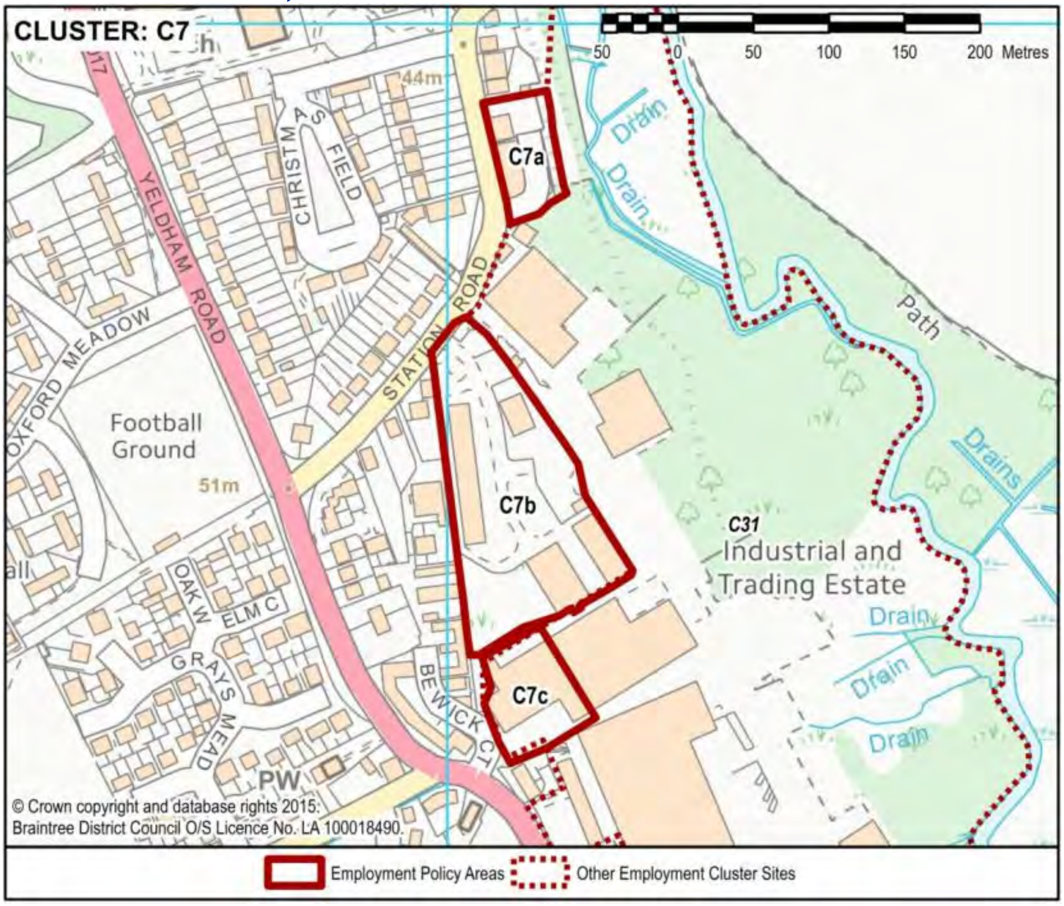
Summary and Key Characteristics	
Business uses: General industrial estate, warehouse/ distribution park. Unit typologies: Large warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Very poor. Conditions of buildings: Poor/very poor. Vacant and available floorspace: A large proportion of units appear vacant but not actively marketed.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Residential to the north.
Parking and servicing	Parking facilities: On street parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: Yes, towards the north of the site. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: No. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: No. Suitable for wider industrial uses: Land for transport functions present on site. Possibility for intensification/ redevelopment: Yes, whole site. Possibility for estate management: Yes.
ELNA Recommendation	De-designate

C6 –FORMER TANNER'S DAIRY, OXFORD LANE, SIBLE HEDINGHAM



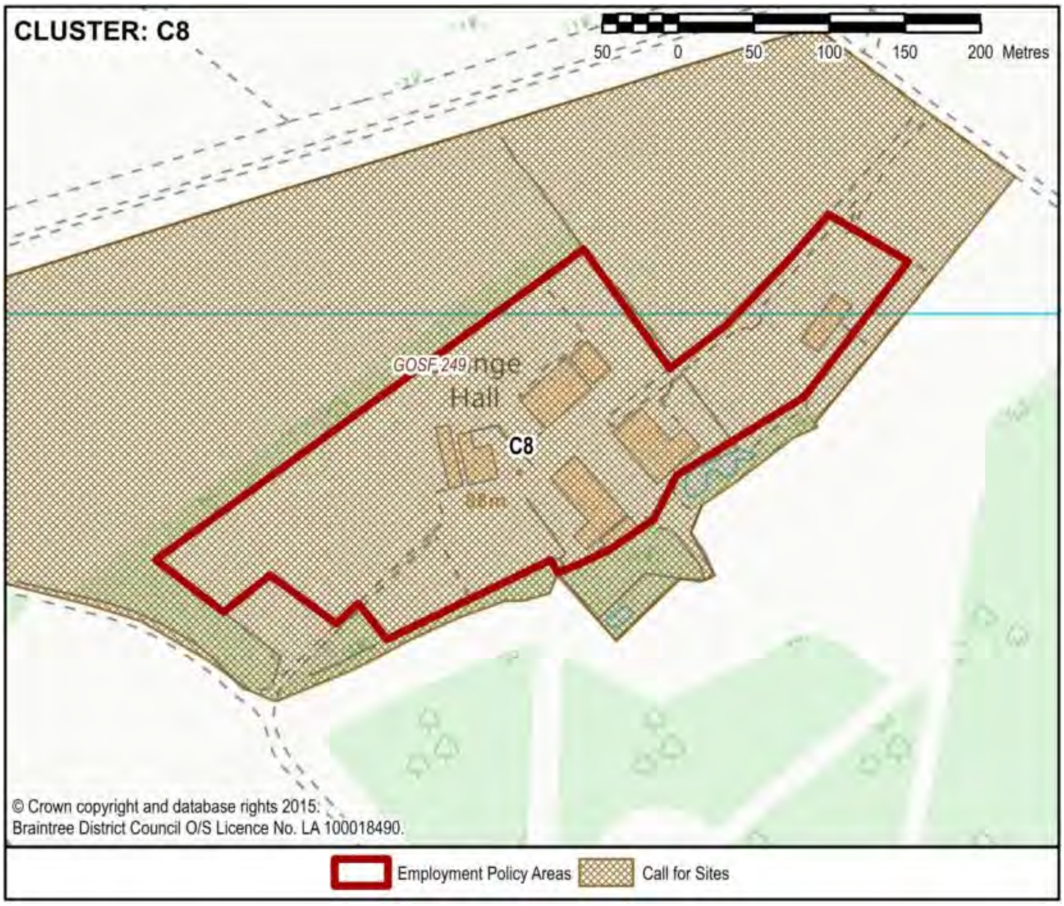
Summary and Key Characteristics	
Business uses: General industrial estate. Unit typologies: Medium-sized warehouse space, yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Poor. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained residential uses to the north.
Parking and servicing	Parking facilities: On street parking. Parking provision: Adequate. Servicing of businesses: Road side loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None, some open areas in the cluster are used as yard space. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: No.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: No. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Yes, whole site. Possibility for estate management: None.
ELNA Recommendation	De-designate

C7 – RIPPERS COURT, SIBLE HEDGINHAM



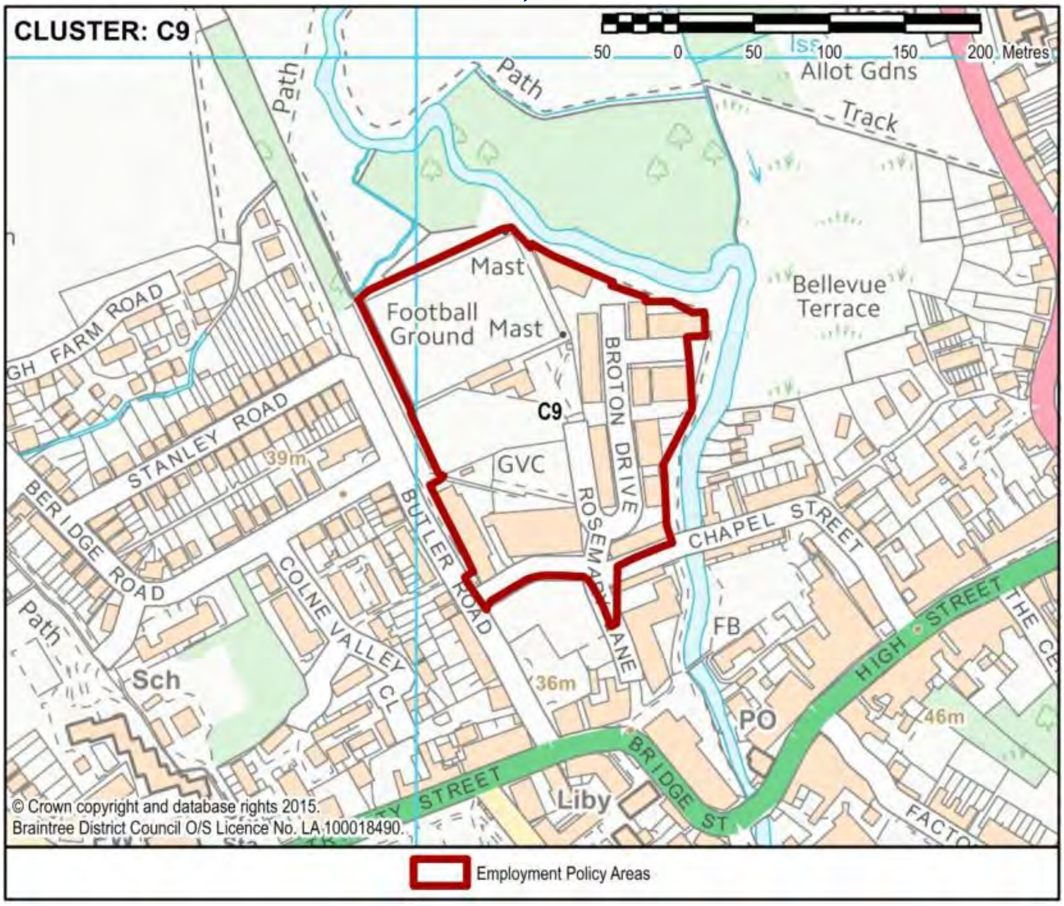
Summary and Key Characteristics	
Business uses: General industrial estate. Unit typologies: Small/medium warehouse space, workshop space, small office space.	
Cluster quality and vacancy	Quality of environment / public realm: Average. Conditions of buildings: Poor. Vacant and available floorspace: Some B1 vacancy observed at Enterprise House.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: None. Bad neighbourhood uses: HGV traffic, significant car traffic. Physical site constraints: Constrained by new residential uses to the south with little possibility for expansion, poor layout for HGV access entering the site.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading. Provision of Servicing: Inadequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes, Enterprise House a suitable location. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Yes, towards the south of the site (Enterprise House). Possibility for estate management: Yes, public realm could be improved.
ELNA Recommendation	C7a – retain as Employment Policy Area. C7b – retain as Employment Policy Area. C7c – retain as Employment Policy Area.

C8 – GOSFIELD AIRFIELD



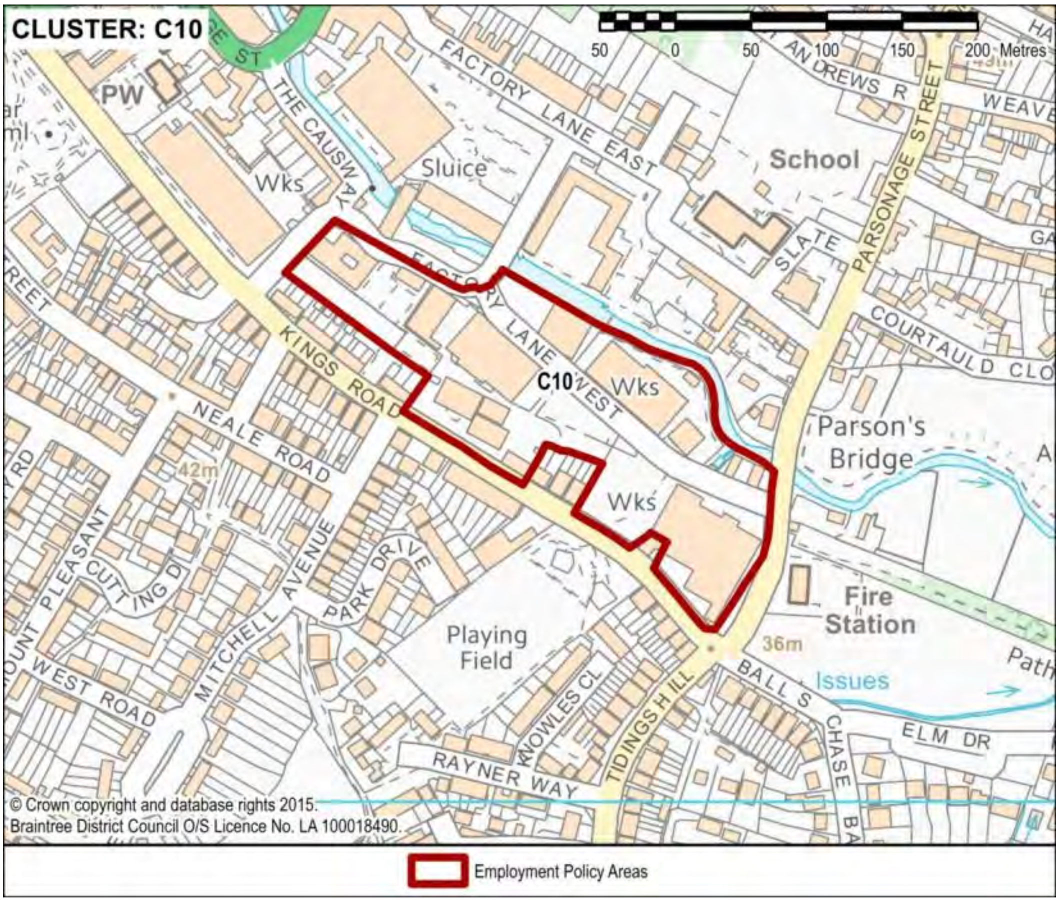
Summary and Key Characteristics	
Business uses: General industrial estate, storage. Unit typologies: Large warehouse space, yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Good, attractive entrance. Conditions of buildings: Average. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: Yes, there are large vacant areas that could be expanded. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: No. Suitable for wider industrial uses: Land for transport functions, ware management/recycling, utilities. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	C8 – retain as Employment Policy Area. GOSF249 – designate for B1c/B2/B8 use.

C9 – BROTON DRIVE INDUSTRIAL AREA, HALSTEAD



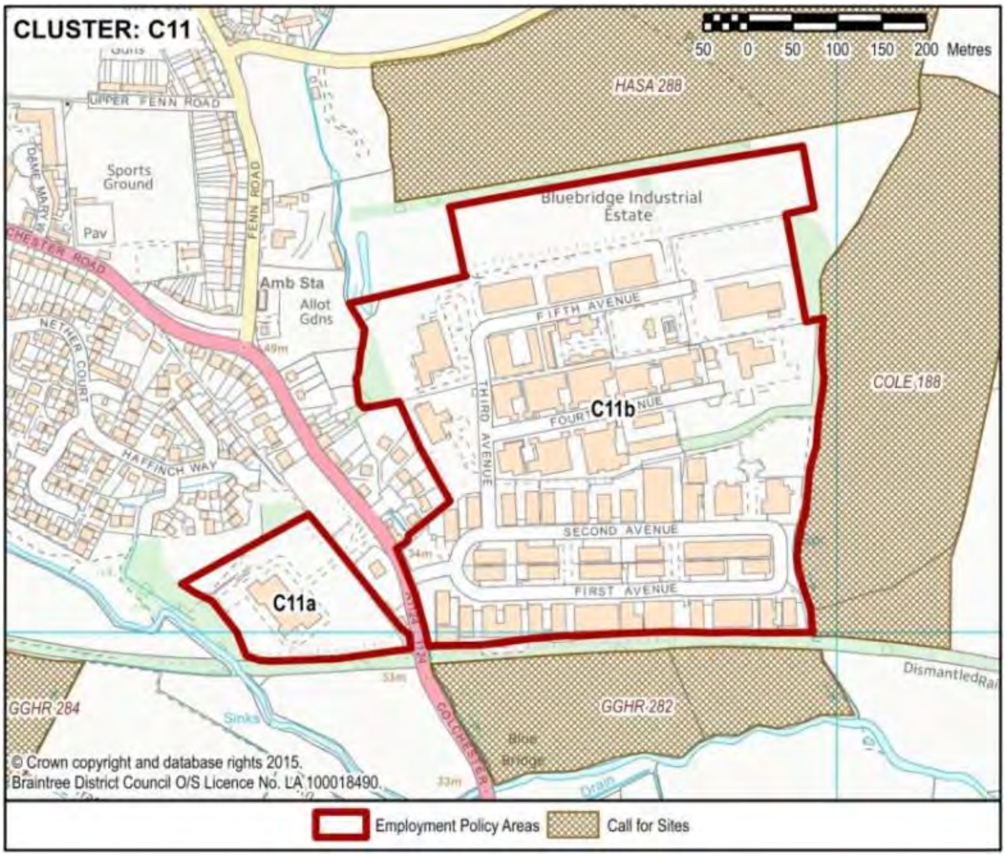
Summary and Key Characteristics	
Business uses: General industrial estate, local office centre, sui generis (car workshops). Unit typologies: Workshop, small office space (Chapel Street).	
Cluster quality and vacancy	Quality of environment / public realm: Good, although very poor on Rosemary Lane (leading to Halstead Town FC). Conditions of buildings: Good, some poor. Vacant and available floorspace: Two vacant plots observed, although not actively marketed.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: Proximity to the River Colne. Bad neighbourhood uses: Noise pollution. Physical site constraints: River Colne runs to the north and east of the cluster.
Parking and servicing	Parking facilities: Controlled parking zone/paid parking nearby. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: Two vacant plots. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: A vacant plot opposite the cluster provides a potential developable area. Possibility for estate management: Could do with some subtle estate management (fixing walls etc).
ELNA Recommendation	Retain as Employment Policy Area.

C10 – HALSTEAD TOWN CENTRE SOUTH



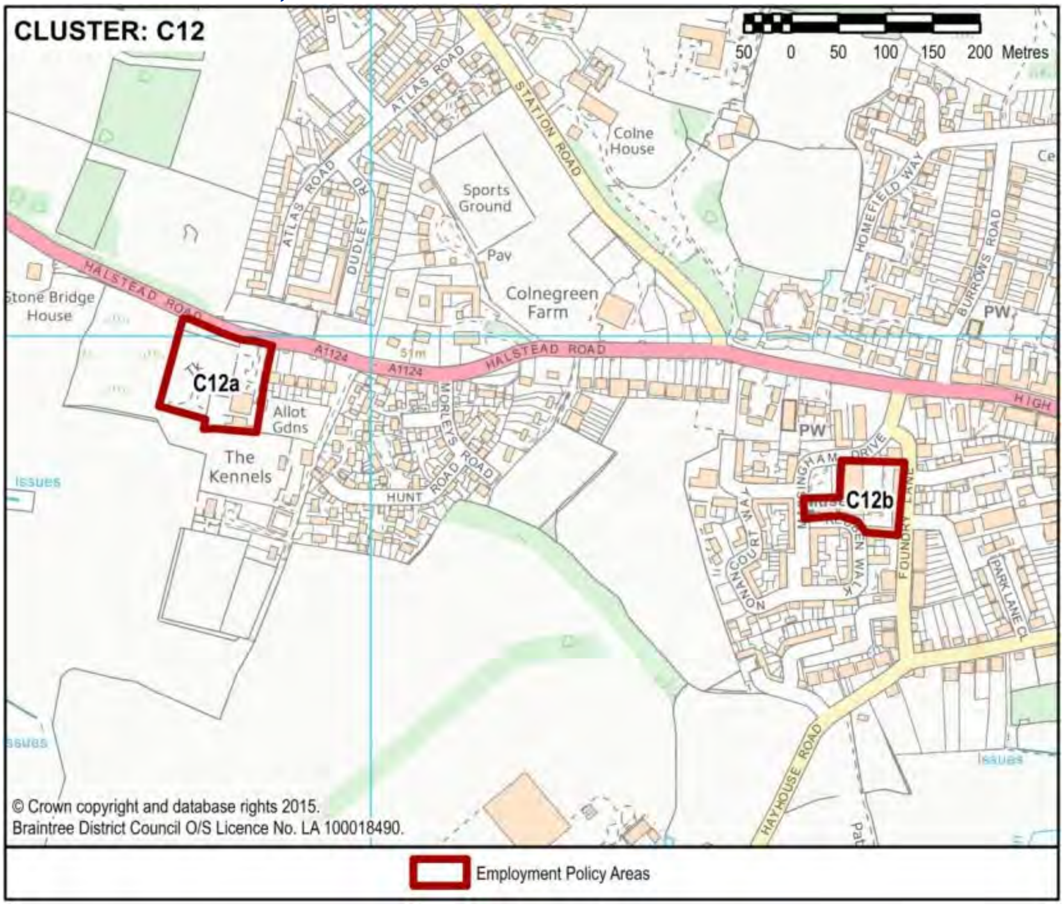
Summary and Key Characteristics	
Business uses: General industrial estate, local office centre, sui generis (car sales). Unit typologies: Workshop space, medium/large warehouse space, small office space.	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Average. Vacant and available floorspace: Vacant sites not actively marketed.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: Proximity to the River Colne. Bad neighbourhood uses: Significant car traffic. Physical site constraints: River Colne runs to the north of the cluster.
Parking and servicing	Parking facilities: On street parking, dedicated parking within cluster. Parking provision: Adequate for what is active, although the surrounding roads are heavily used for parking. Servicing of businesses: Road side loading/unloading, off road loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: Yes, there are three derelict plots and one derelict land (cleared) that constitute a majority of site. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None, although evidence of this nearby. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None, existing/current uses not suitable despite other strategic characteristics being met. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Yes, most of/whole site. Possibility for estate management: None.
ELNA Recommendation	Re-designate for Mixed Use.

C11 – BLUEBRIDGE INDUSTRIAL ESTATE



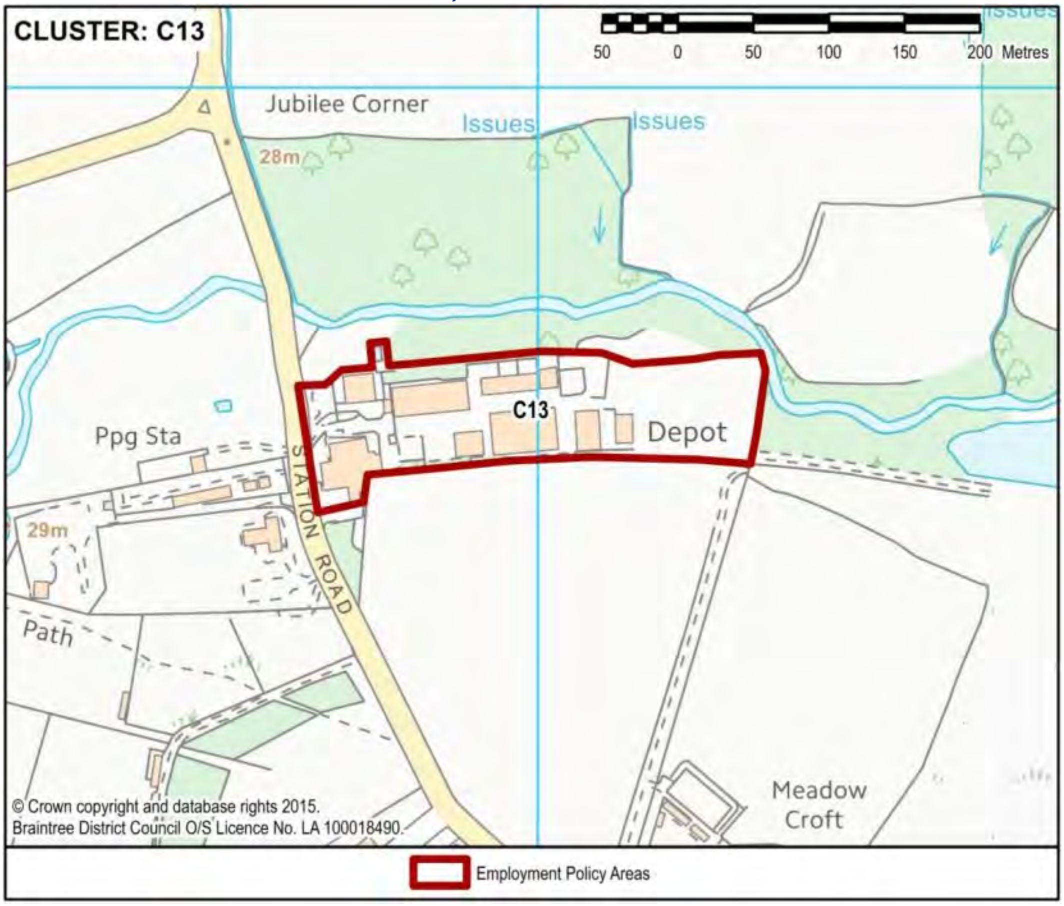
Summary and Key Characteristics	
Business uses: General industrial estate, warehouse/distribution park. Unit typologies: Small warehouse space, workshop space, yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Poor, it could be improved across whole site. The quality of the public realm at Central Piling site is very poor. Conditions of buildings: Good, a minority poor. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: HGV traffic, significant car traffic. Physical site constraints: Layout issues associated with accessing the site, located on steep ground.
Parking and servicing	Parking facilities: Dedicated parking within cluster, on street parking. Parking provision: Too little. Servicing of businesses: Off-road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: No. Suitable for wider industrial uses: Land for transport functions, waste management/recycling, utilities. Possibility for intensification/ redevelopment: Large potential for expansion into areas surrounding the site (identified as part of the Call for Sites). Possibility for estate management: Some unit areas could benefit from renewal.
ELNA Recommendation	C11a – retain as Employment Policy Area. C11b – retain as Employment Policy Area. COLE118 – designate for B1c/B2/B8 use class/mixed use. HASA288 – designate for B1c/B2/B8 use class/mixed use. GGHR282 – designate for B1c/B2/B8 use class/mixed use.

C12 – ATLAS WORKS, EARLS COLNE



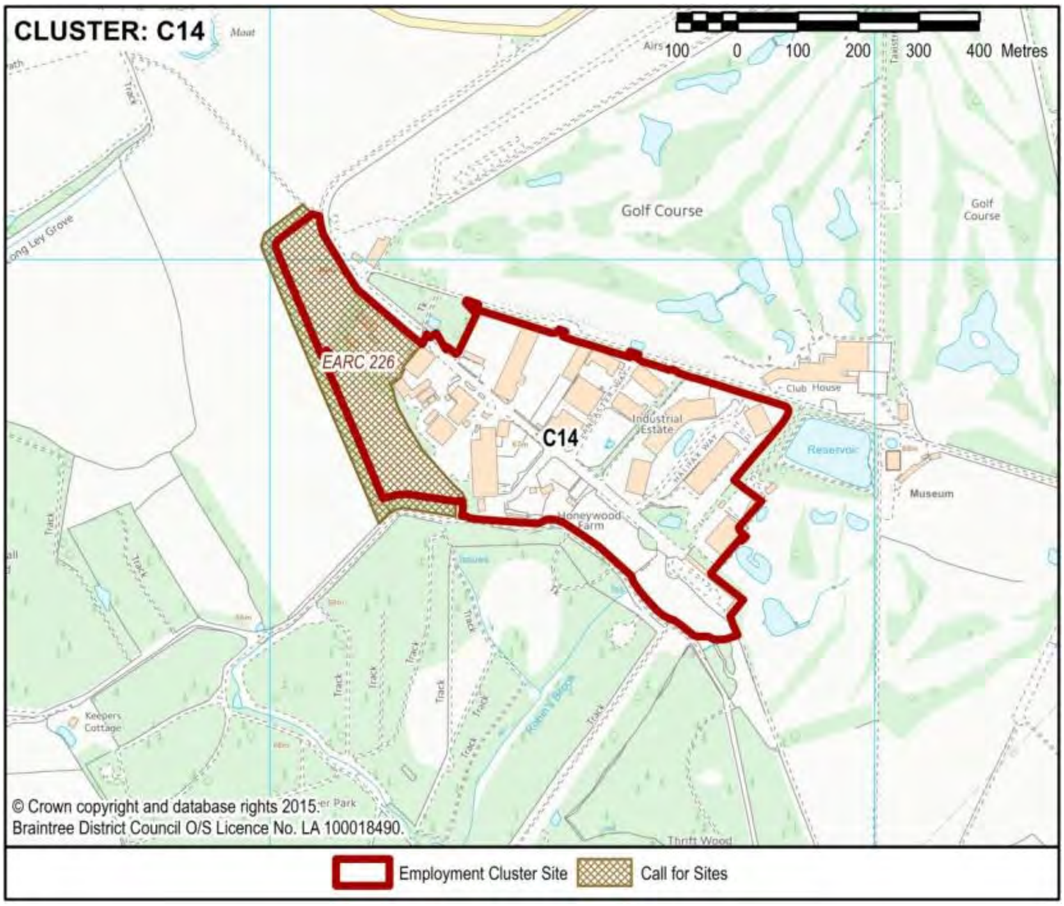
Summary and Key Characteristics	
Business uses: Local office centre, start-up/small business cluster. Unit typologies: Small office space, workshop space.	
Cluster quality and vacancy	Quality of environment / public realm: Very good. Conditions of buildings: Very good. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained by residential.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Road side loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: Yes, the cluster surrounded by new residential units. Presence of high growth sector occupiers: Yes, examples include media, design and planning and publishing sectors.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	C12a – retain as Employment Policy Area. C12b – retain as Employment Policy Area.

C13 – RIVERSIDE BUSINESS PARK, EARLS COLNE



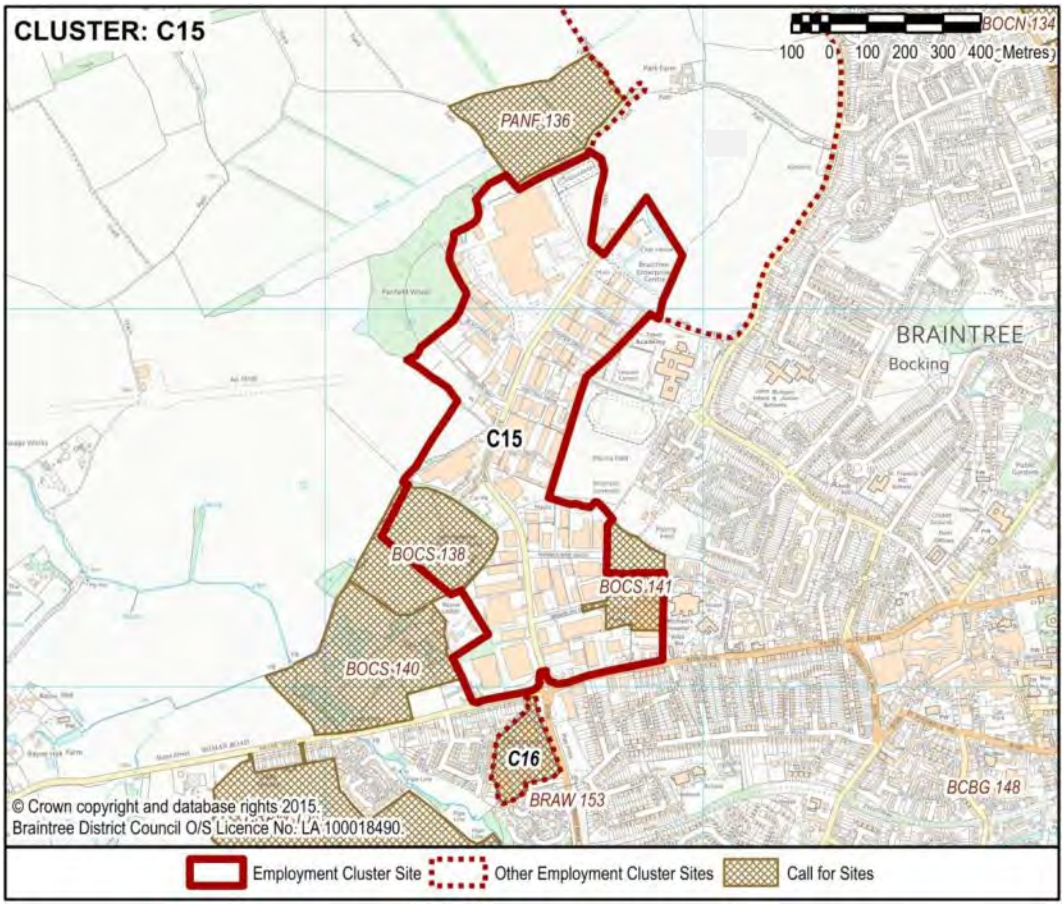
Summary and Key Characteristics	
Business uses: Warehouse/distribution, workshops. Unit typologies: Small warehouse space, workshop space.	
Cluster quality and vacancy	Quality of environment / public realm: Good. Conditions of buildings: Average. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: Proximity to river. Bad neighbourhood uses: None. Physical site constraints: Proximity to river.
Parking and servicing	Parking facilities: On street parking. Parking provision: Adequate. Servicing of businesses: Off-road. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes. Suitable for wider industrial uses: Waste management/ recycling, utilities. Possibility for intensification/ redevelopment: Yes, there is potential to develop land towards north of the site Evidence of new units being constructed. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area.

C14 – EARLS COLNE AIRFIELD



Summary and Key Characteristics	
Business uses: General industrial estate, storage, warehouse/distribution park. Unit typologies: Medium/large warehouse space, workshop space, yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Good, very good to the east of the cluster. Conditions of buildings: Good. Vacant and available floorspace: One B8 site, appears vacant but not actively marketed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: Air pollution (concrete manufacturing), noise pollution, HGV traffic. Physical site constraints: Airfield to west, golf course to north.
Parking and servicing	Parking facilities: Dedicated parking within cluster, on street parking. Parking provision: Adequate. Servicing of businesses: Off-road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: One unit. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None, although potential to attract high growth sector occupiers within The Business Centre at the east of the site.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: Wholesale markets, land for transport functions, waste management/recycling, utilities. Possibility for intensification/ redevelopment: Possibility of expansion to other areas. Possibility for estate management: None.
ELNA Recommendation	C14 – retain as Employment Policy Area. EARC226 – designate for B1c/B2/B8 use class/mixed use.

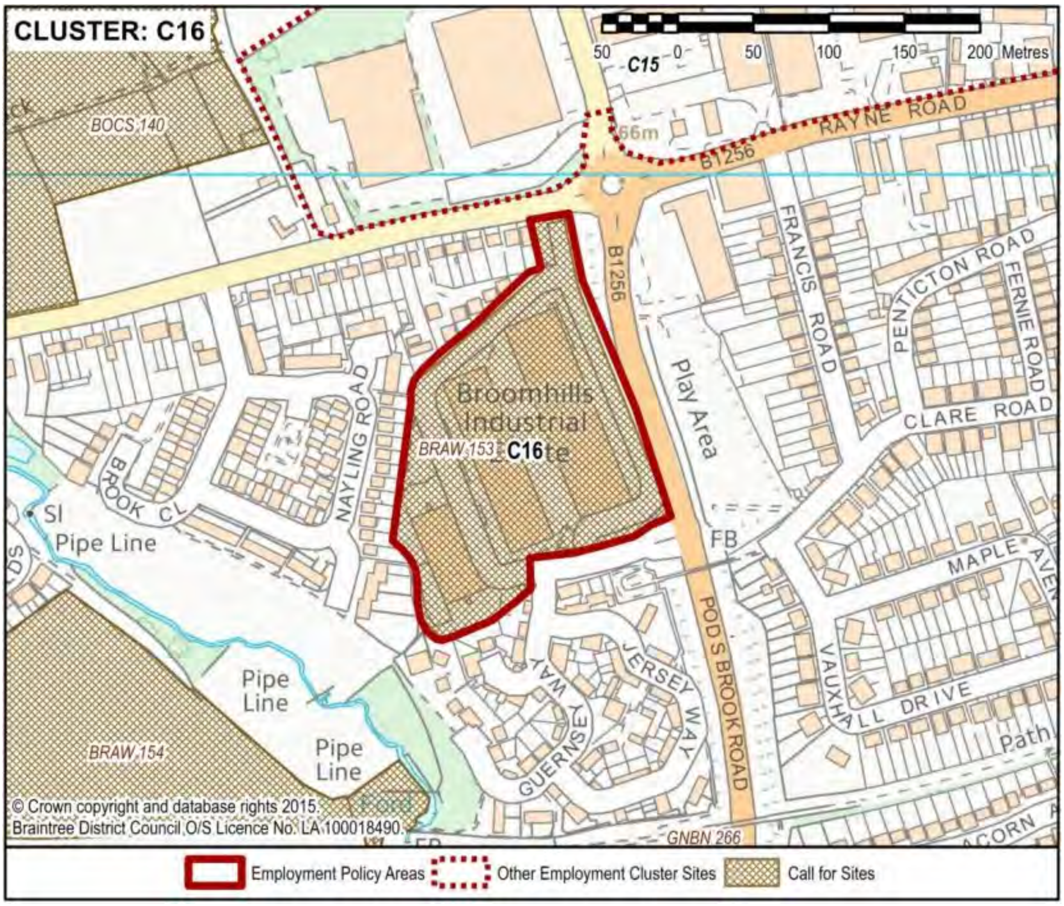
C15 – SPRINGWOOD INDUSTRIAL ESTATE



Summary and Key Characteristics	
Business uses: General industrial, waste management, warehouse/distribution park, Sui Generis (car repairs). Unit typologies: Medium/large warehouse space, small warehouse space, workshop space, yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Good. Conditions of buildings: Average, some very good. Vacant and available floorspace: Very low.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: HGV traffic, significant car traffic. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None Two sites being built out are under construction to the north of the site; one site under construction, another cleared for redevelopment Some derelict land adjacent to open storage of a similar size (prospect for expansion). Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Possibility in some areas with a poorer grade of stock, although unlikely to be at a lower cost. Suitable for wider industrial uses: Land for transport functions already within cluster Wholesale markets, waste management/recycling, utilities would also be suitable. Possibility for intensification/ redevelopment: No possibility for intensification There is potential for the possible redevelopment of derelict sites and expansion of cluster outwards. Possibility for estate management: Some improvements could be made to signage and public realm

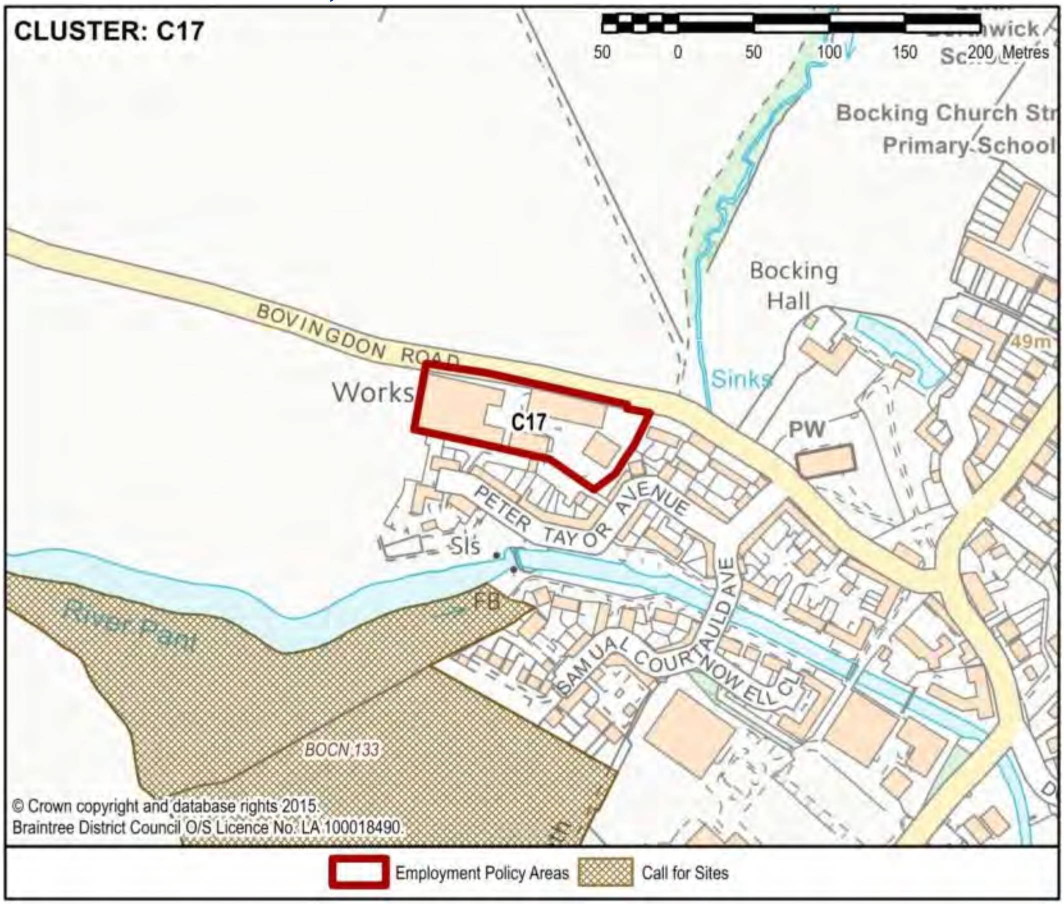
	more generally Overall site looks to be functional use.
ELNA Recommendation	C15 – retain as Employment Policy Area. PANF136 – Designate for B1c/B2/B8 Use Class/Mixed Use. BOCS138 – Designate for B1c/B2/B8 Use Class/Mixed Use.

C16 – BROOMHILLS INDSUTRIAL ESTATE



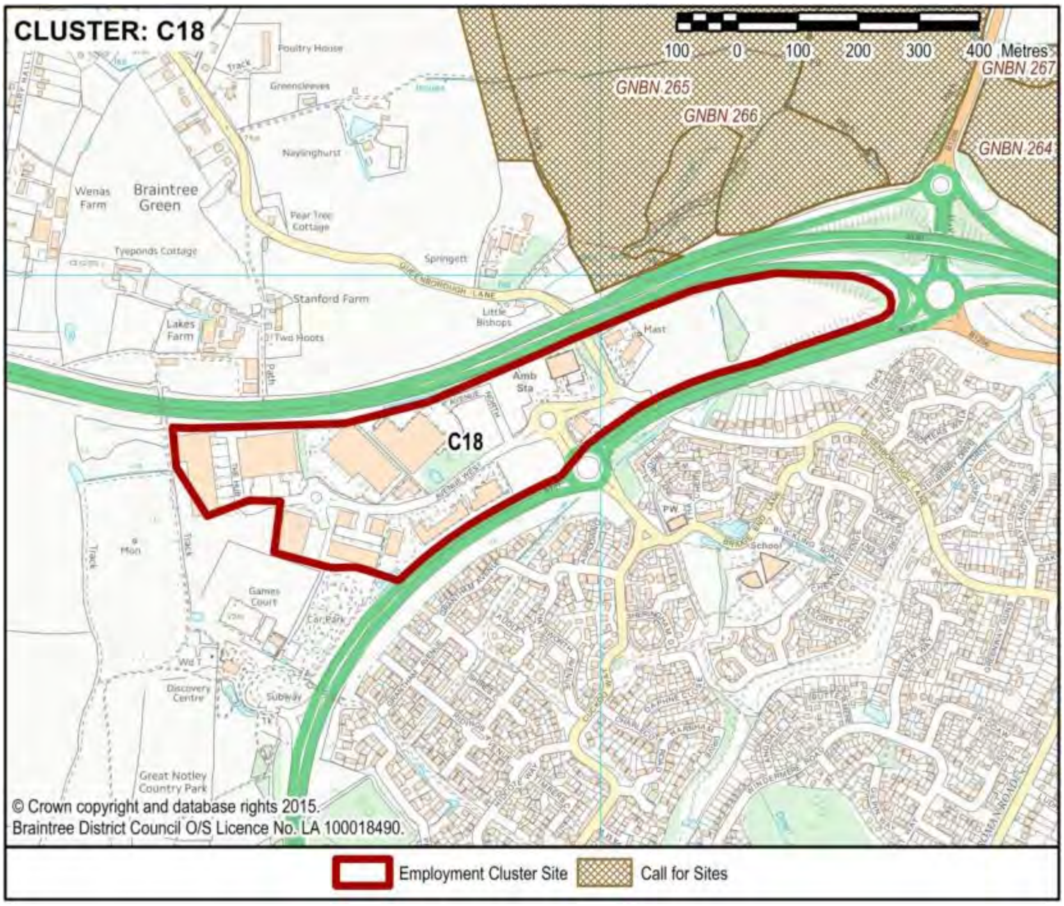
Summary and Key Characteristics	
Business uses: Sui Generis (electrical goods wholesalers). Unit typologies: Small warehouse space, workshop space.	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Poor. Vacant and available floorspace: In excess of 90%.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained by residential uses to the north, west and south, and the B1256 to the east.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: Large majority of units vacant and of poor quality. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes, the cluster contains many small units that are likely to be low cost. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Yes, whole area. Possibility for estate management: Yes, whole area.
ELNA Recommendation	De-designate

C17 – BOVINGTON ROAD, BOCKING CHURCHSTREET



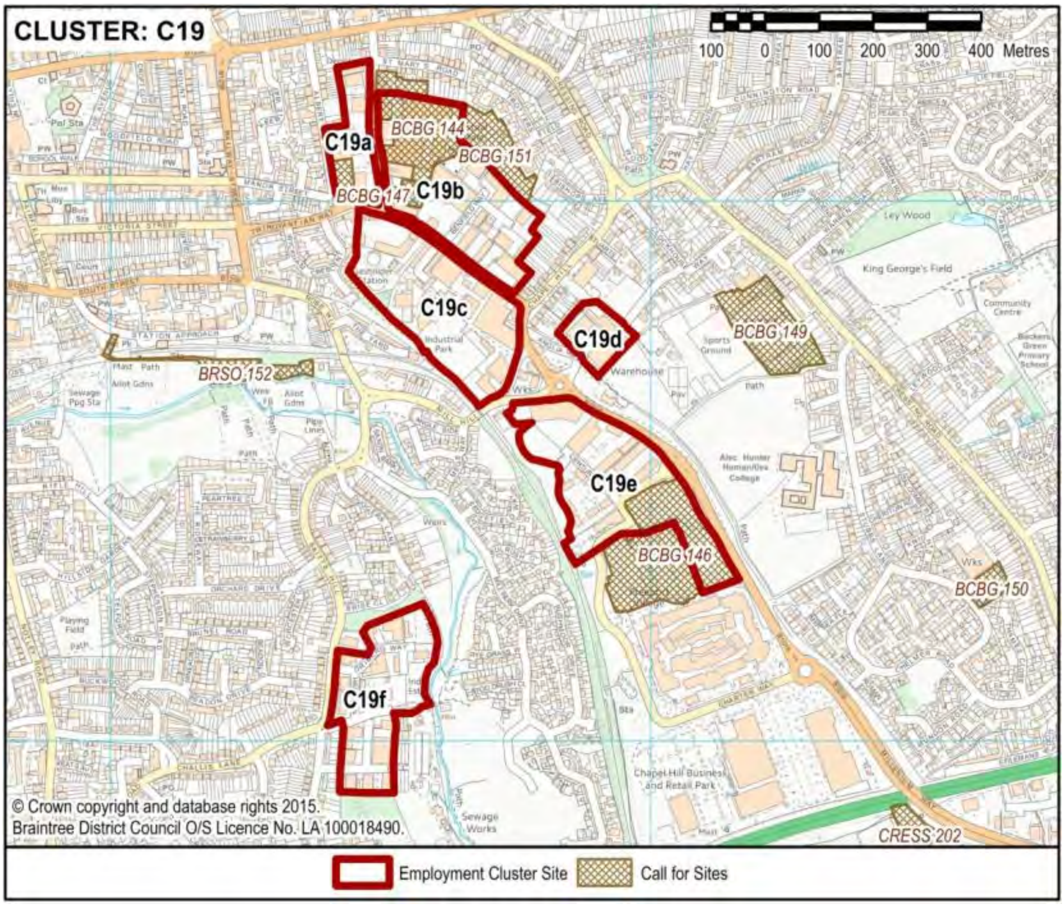
Summary and Key Characteristics	
Business uses: None (vacant). Unit typologies: Medium warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Very poor. Conditions of buildings: Very poor. Vacant and available floorspace: Whole site appears vacant.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained by Bovingdon Road to the north and Peter Taylor Avenue to the east and south.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Unknown. Servicing of businesses: Off road loading/unloading. Provision of Servicing: Inadequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: Whole site. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None, although new residential units located nearby. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: No, dominated by large units. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Whole site suitable for redevelopment. Possibility for estate management: None.
ELNA Recommendation	De-designate

C18 – SKYLINE 120



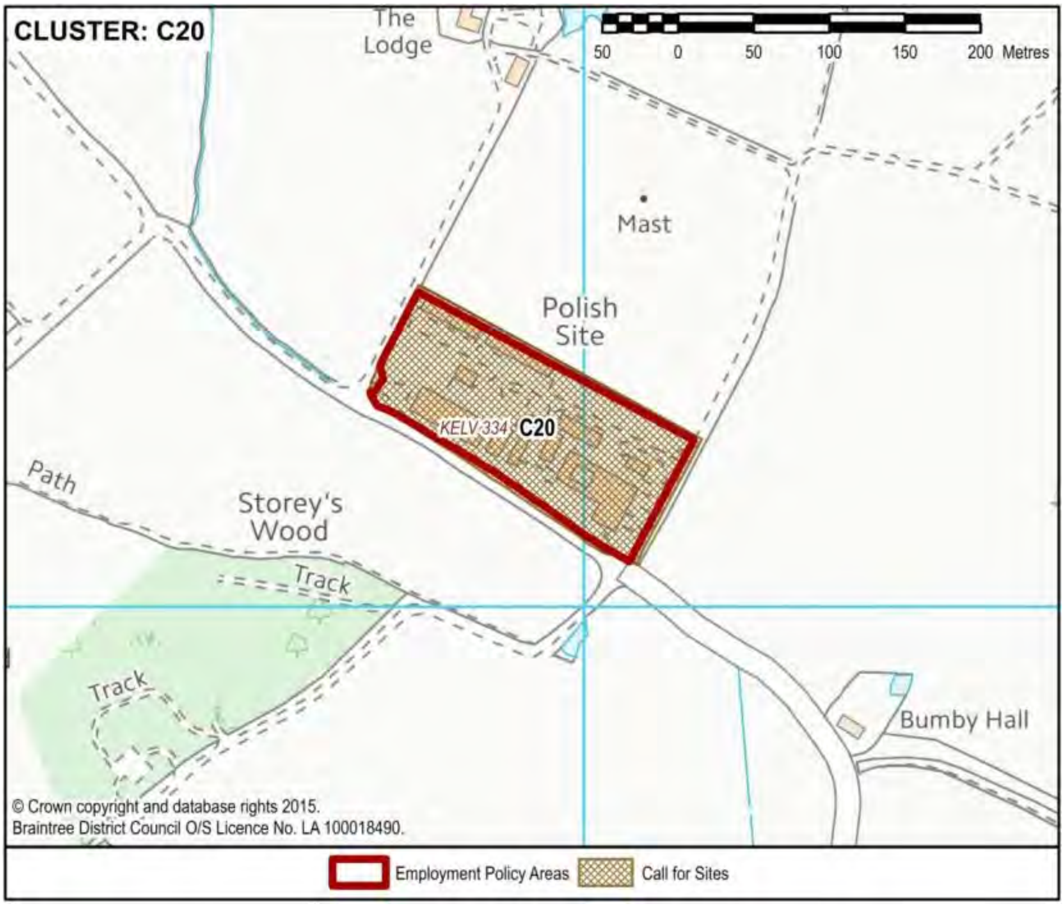
Summary and Key Characteristics	
Business uses: Business District, business park, Sui Generis (self-storage). Unit typologies: Medium/large office space, medium/large warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Very good. Conditions of buildings: Very good. Vacant and available floorspace: Some transitional vacancy.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Constrained by A120 to the north and A131 to the south.
Parking and servicing	Parking facilities: Dedicated parking within cluster, yellow/double yellow lines. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: Some vacant plots but planned to expand outwards. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: Yes - aviation, financial services.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None, units generally larger in size and expensive. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Potential to expand in south west direction. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area.

C19 – BRAINTREE TOWN



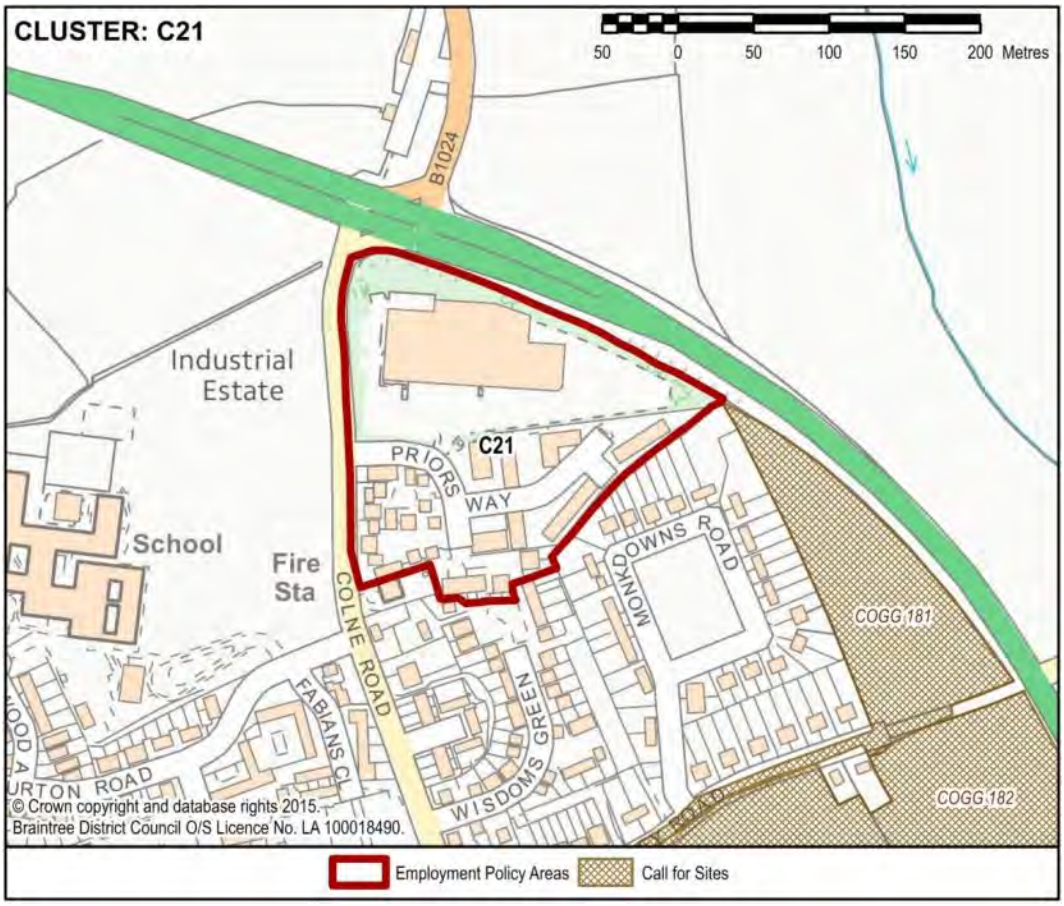
Summary and Key Characteristics	
Business uses: Local office centre, warehouse/distribution park, start-up/small business cluster. Unit typologies: Medium office space, workshop space.	
Cluster quality and vacancy	Quality of environment / public realm: Good, very good in parts. Conditions of buildings: Good, poor towards the north of the cluster and very good at the Freeport & Enterprise Centre. Vacant and available floorspace: Vacancy generally low.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: None. Bad neighbourhood uses: Significant car traffic. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None Some of poor quality north of roundabout but still observed to have some functional use. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: Yes High-grade office space (financial & business service sectors), workshop units (Lakes Innovation Centre).
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes, successful workshop units. Suitable for wider industrial uses: Wholesale markets. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	C19a – retain as Employment Policy Area. C19b – retain as Employment Policy Area. C19c – retain as Employment Policy Area. C19d – retain as Employment Policy Area. C19e – retain as Employment Policy Area. C19f – retain as Employment Policy Area.

C20 – FORMER POLISH CAMPSITE



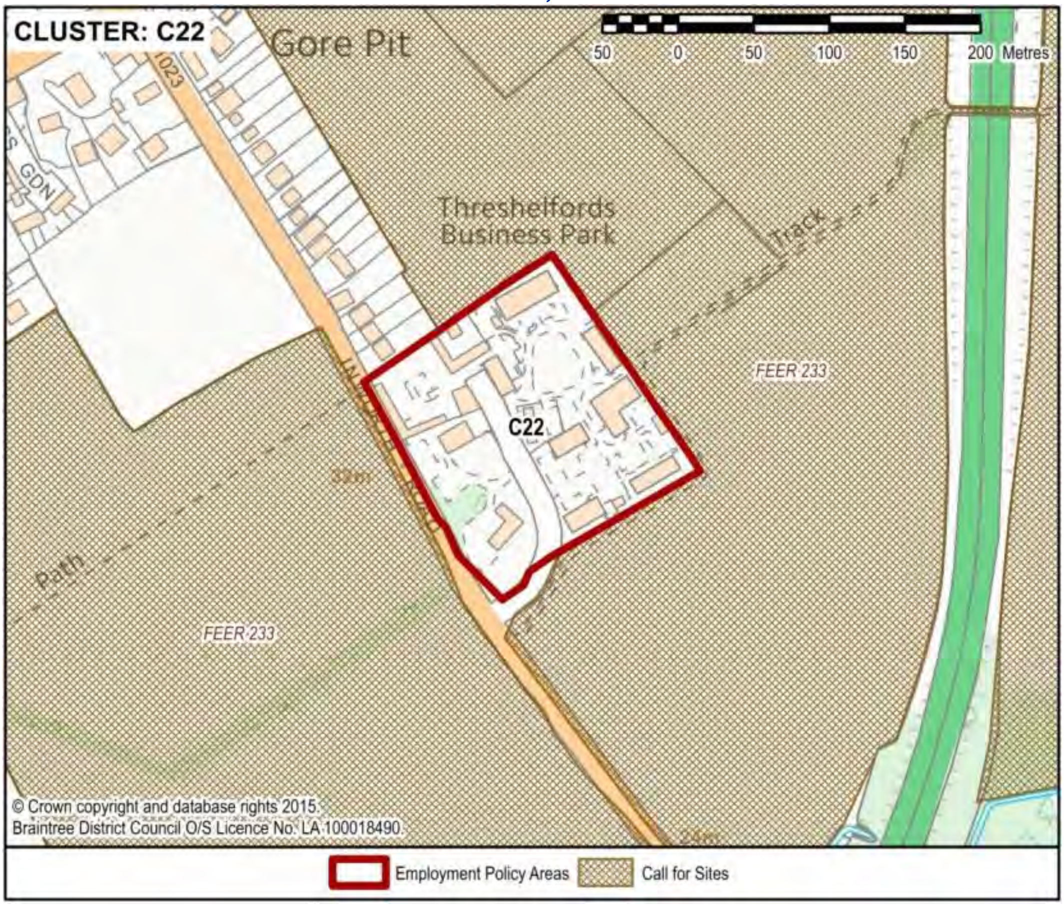
Summary and Key Characteristics	
Business uses: Local office centre, warehouse/distribution park. Unit typologies: Medium warehouse space, small office space.	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Poor. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: HGV traffic. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: Waste management/recycling, utilities. Possibility for intensification/ redevelopment: Yes, whole site. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area.

C21 – COGGESHALL INDUSTRIAL AREA



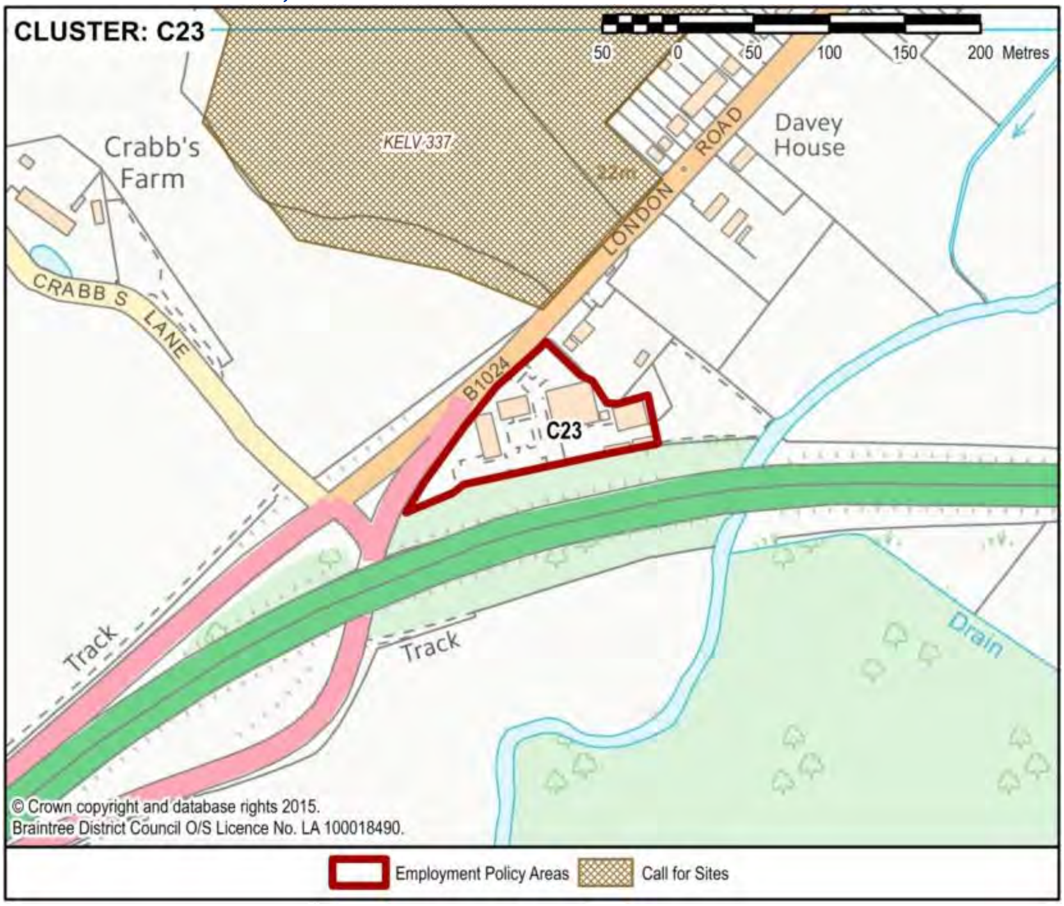
Summary and Key Characteristics	
Business uses: General business area, warehouse/distribution park. Unit typologies: Large warehouse space (single distribution centre), workshop space.	
Cluster quality and vacancy	Quality of environment / public realm: Good. Conditions of buildings: Good, distribution centre very good. Vacant and available floorspace: Some workshop units appear vacant but not actively marketed.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: HGV traffic. Physical site constraints: Constrained residential uses and the A120.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Off-road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Very suitable. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: None, although there is evidence of businesses occupying residential units nearby. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area.

C22 – THRESHELFORDS BUSINESS PARK, FEERING



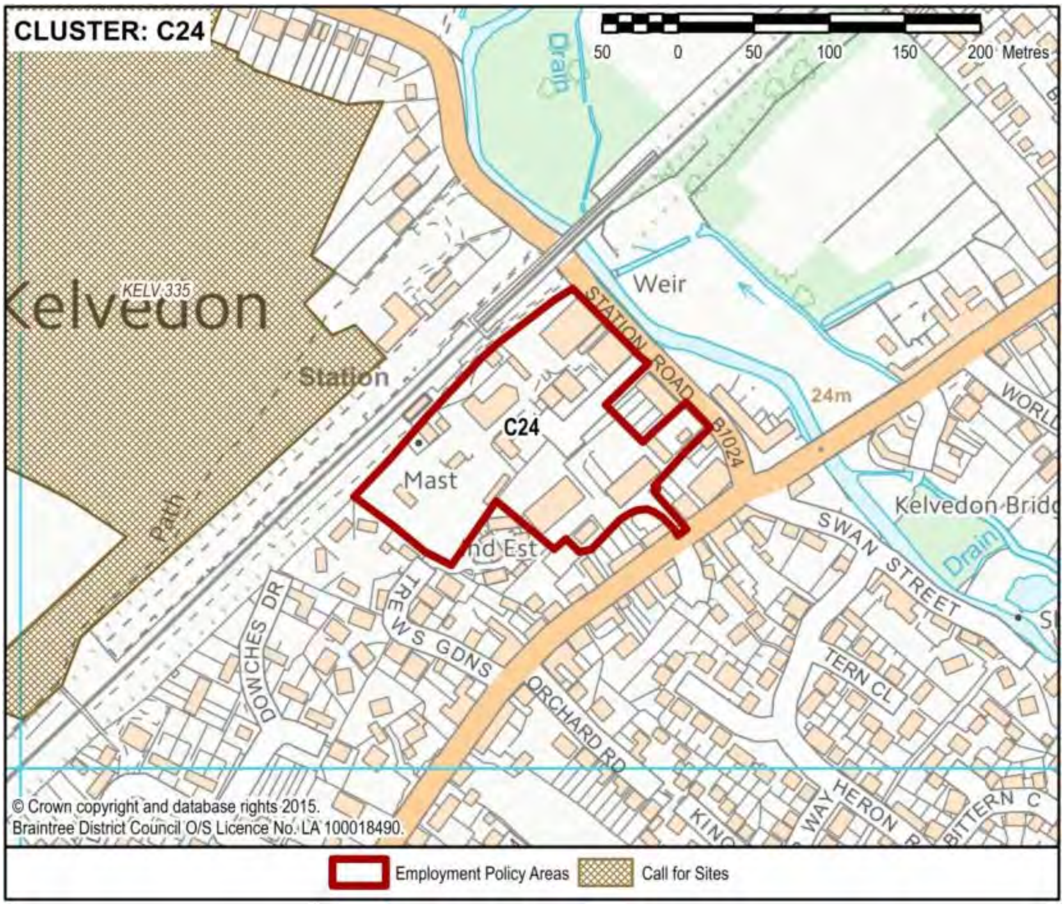
Summary and Key Characteristics	
Business uses: Business District. Unit typologies: Small office space.	
Cluster quality and vacancy	Quality of environment / public realm: Good. Conditions of buildings: Good. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Road side loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: Yes – technology, marketing sectors.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: Yes, large areas nearby have been identified within the Call for Sites as potential employment locations. Possibility for estate management: None.
ELNA Recommendation	Retain for Business Uses

C23 – LONDON ROAD, KEVELDON



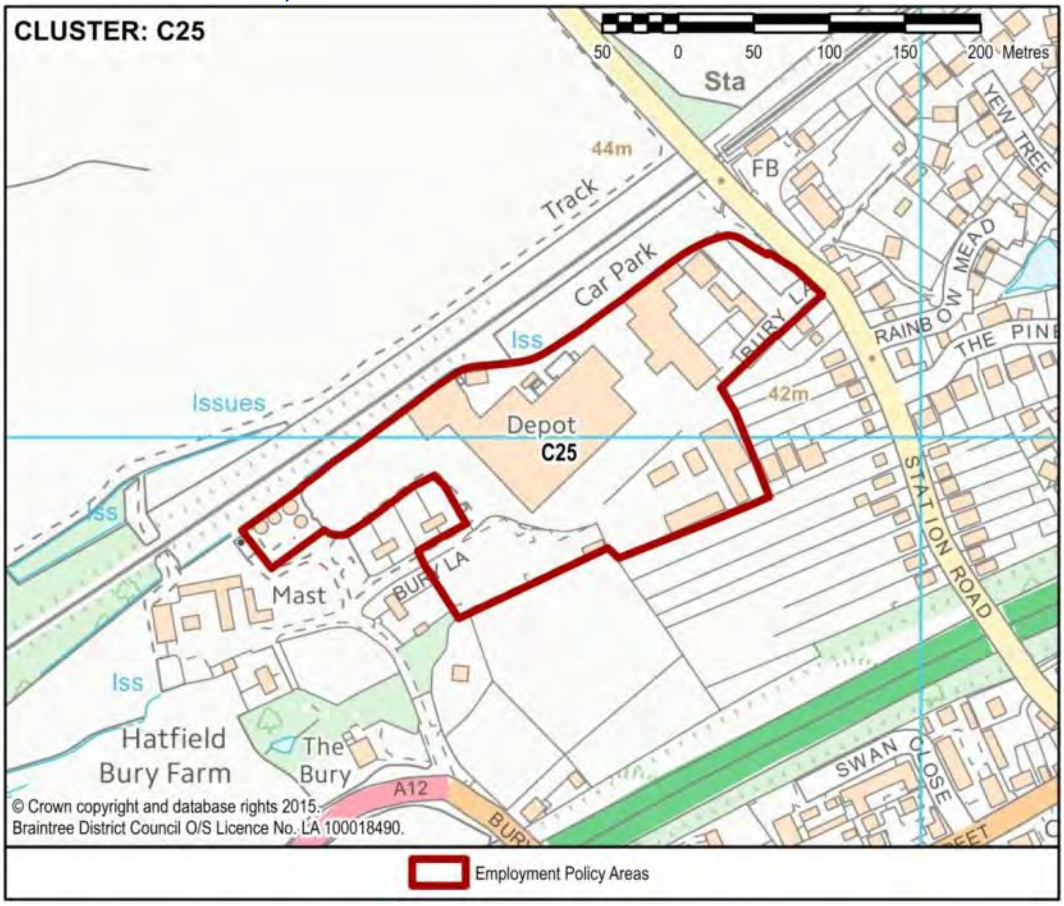
Summary and Key Characteristics	
Business uses: Business District, warehouse/distribution park. Unit typologies: Medium office space, medium warehouse space, yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Good, although poor by open storage. Conditions of buildings: Good. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: Bounded by B1024 to the north and A120 to the south.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Indirect.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: Yes – telecommunications design.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: Yes, land for transport functions. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area.

C24 –KEVEKLDON RAILWAY STATION



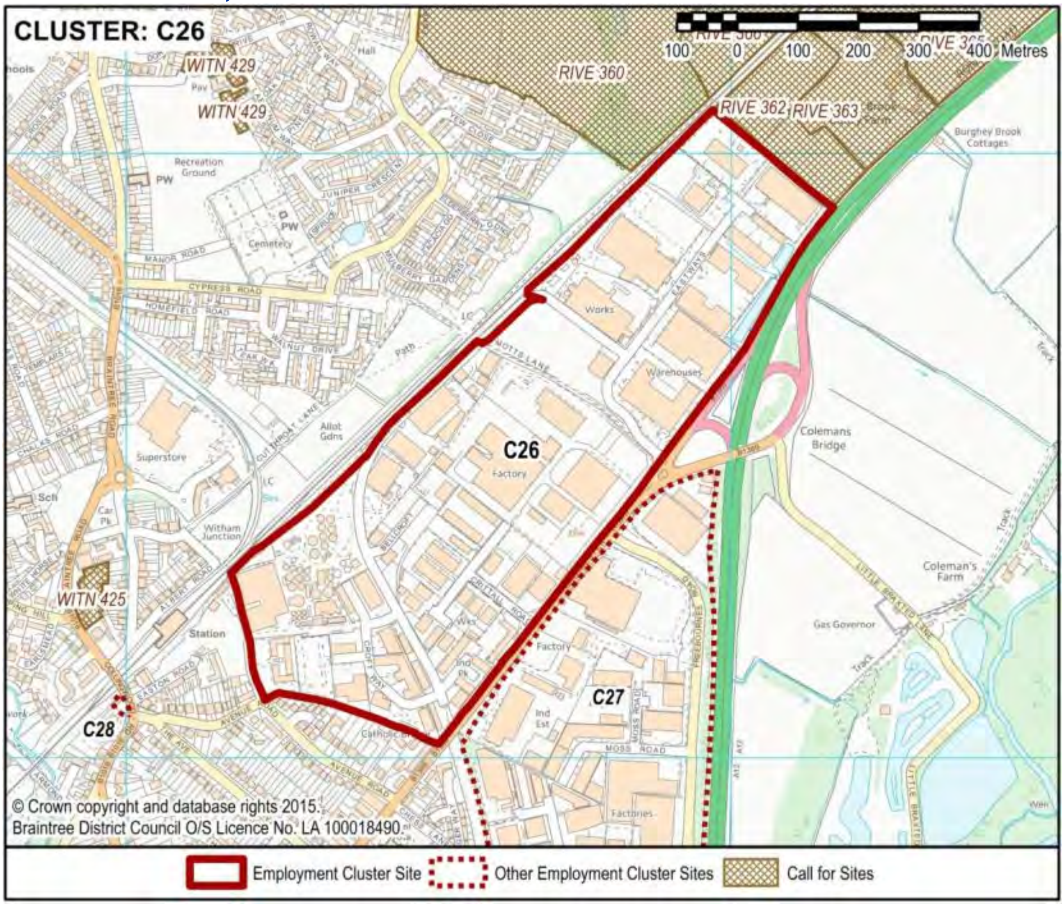
Summary and Key Characteristics	
Business uses: Sui Generis (car showroom and sales, car repair, car parking, bus depot), general industrial estate. Unit typologies: Small warehouse space, workshop space.	
Cluster quality and vacancy	Quality of environment / public realm: Poor. Conditions of buildings: Average, although workshop spaces are generally of poor/very poor quality. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Good. Ecological issues: None. Bad neighbourhood uses: Some noise pollution from car repair but deemed insignificant. Physical site constraints: Bounded by the railway and busy Station Road Connectivity within the cluster very poor.
Parking and servicing	Parking facilities: Dedicated parking within cluster. Parking provision: Adequate. Servicing of businesses: Road side loading/unloading, off-road loading/unloading. Provision of Servicing: Inadequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: Land for transport functions. Possibility for intensification/ redevelopment: Yes, all of site bar showroom and potentially bus depot could be redeveloped and/or intensified. Possibility for estate management: Prospects for estate management but better if it was wholly redeveloped.
ELNA Recommendation	De-designate.

C25 –ARLA FACTORY, HATFIELD PEVEREL



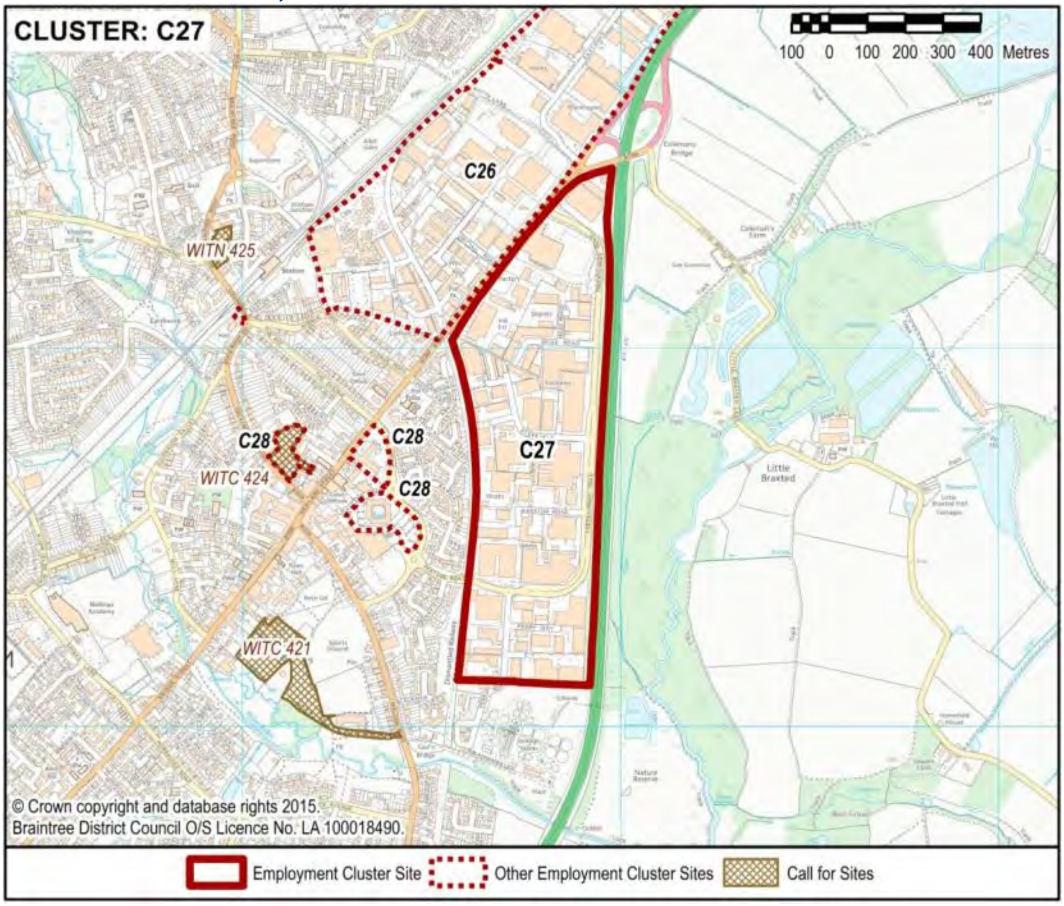
Summary and Key Characteristics	
Business uses: General industrial area. Unit typologies: Factory space, large warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Good. Conditions of buildings: Good. Vacant and available floorspace: None observed.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: HGV traffic. Physical site constraints: Residential.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: None. Suitable for wider industrial uses: Land for transport functions, waste management/recycling. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area.

C26 –EASTWAYS, WITHAM INDUSTRIAL ESTATE



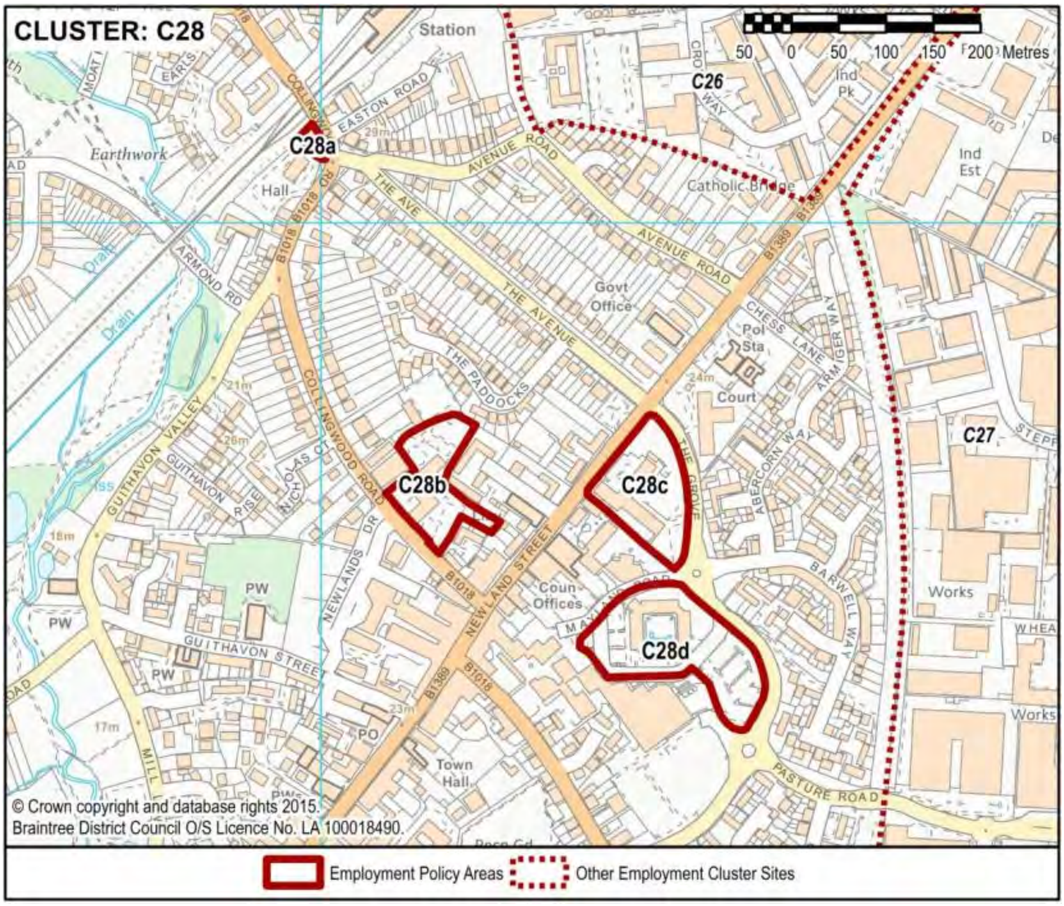
Summary and Key Characteristics	
Business uses: General industrial estate, Sui Generis (car repairs). Unit typologies: Small office space, warehouse space (significant variation in size), workshop space (significant variation in size), yard space/open storage.	
Cluster quality and vacancy	Quality of environment / public realm: Good, especially towards north of the site. Conditions of buildings: Good, some very good. Vacant and available floorspace: Low.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: Air pollution (malting), HGV traffic, significant car traffic. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: Some small pockets (<10%). Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: Yes - technology-based production (lighting, electrical), manufacturing of parts.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes The cluster contains some small units so potential exists. Suitable for wider industrial uses: Waste management/recycling, utilities. Possibility for intensification/ redevelopment: No potential for intensification although some vacant sites are suitable for development. Possibility for estate management: None.
ELNA Recommendation	Retain as Employment Policy Area. Consider designating RIVE362 and 363 as Employment Policy Area.

C27 –FREEBOURNES, WITHAM INDUSTRIAL ESTATE



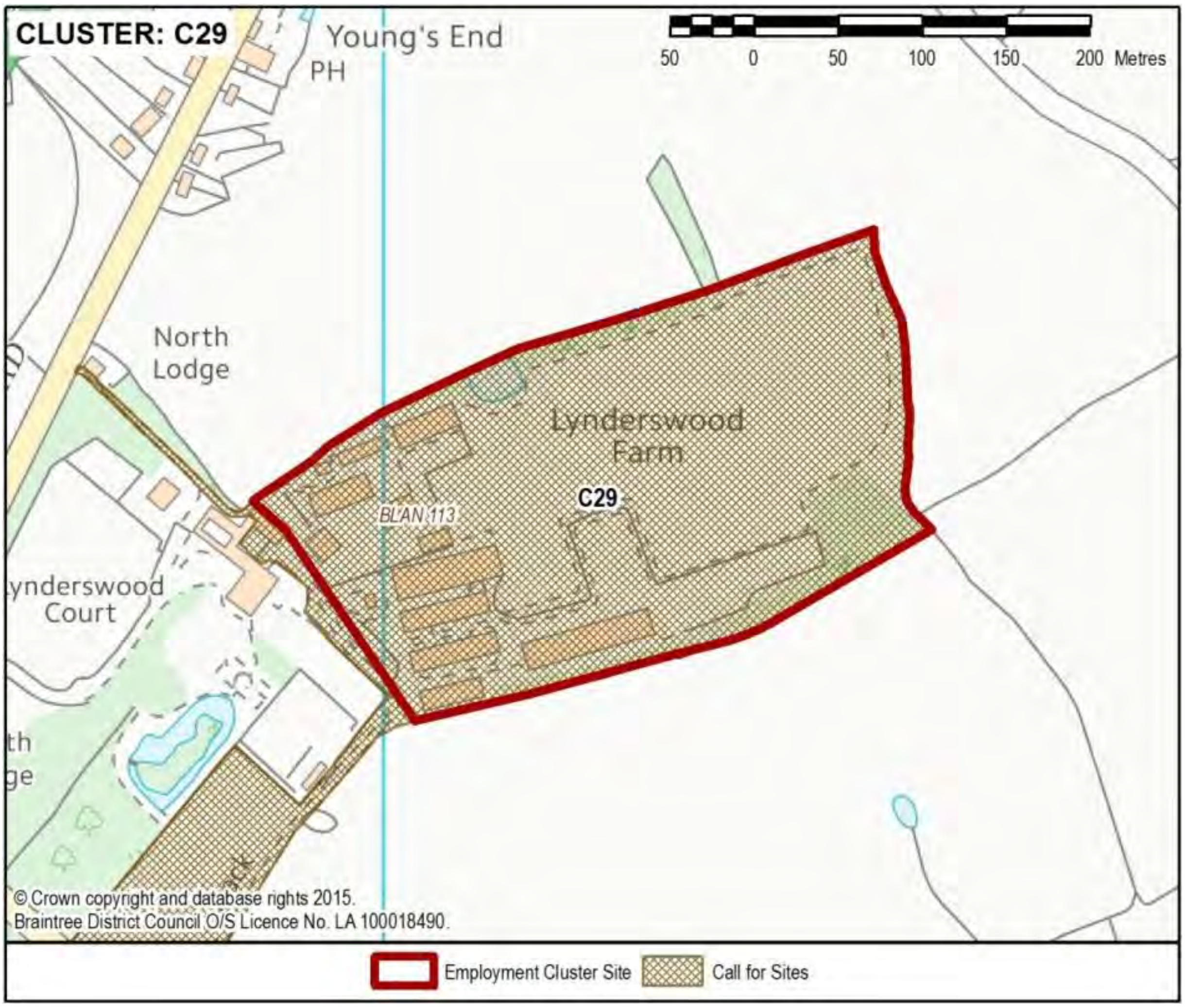
Summary and Key Characteristics	
Business uses: General industrial estate, warehouse/distribution park, small business cluster (Briarsford and Wheater Industrial Estates, Moss Road and Stepfield), environmental industries, Sui Generis (car repairs). Unit typologies: Medium warehouse space, workshop space, local office space.	
Cluster quality and vacancy	Quality of environment / public realm: Good, although very poor at southern tip. Conditions of buildings: Good, some very good, although very poor at southern tip. Vacant and available floorspace: Very low.
Cluster constraints	Access to facilities and amenities: Poor. Ecological issues: None. Bad neighbourhood uses: HGV traffic, significant car traffic. Physical site constraints: None, well laid out.
Parking and servicing	Parking facilities: Dedicated parking, on-street parking (some overflow). Parking provision: Too little (in parts). Servicing of businesses: Off road loading/unloading, loading bays. Provision of Servicing: Adequate.
Access	Strategic road access: Direct. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: <5% derelict, only a few vacant buildings. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Briarsford and Wheater Industrial Estates, Moss Road and Stepfield are all areas suitable for SMEs However, there is evidence of Sui Generis uses on these sites. Suitable for wider industrial uses: Wholesale markets, land for transport functions, waste management/recycling, utilities. Possibility for intensification/ redevelopment: At southern point of cluster. Possibility for estate management: At southern point of cluster.
ELNA Recommendation	Retain as Employment Policy Area.

C28 –WITHAM TOWN CENTRE



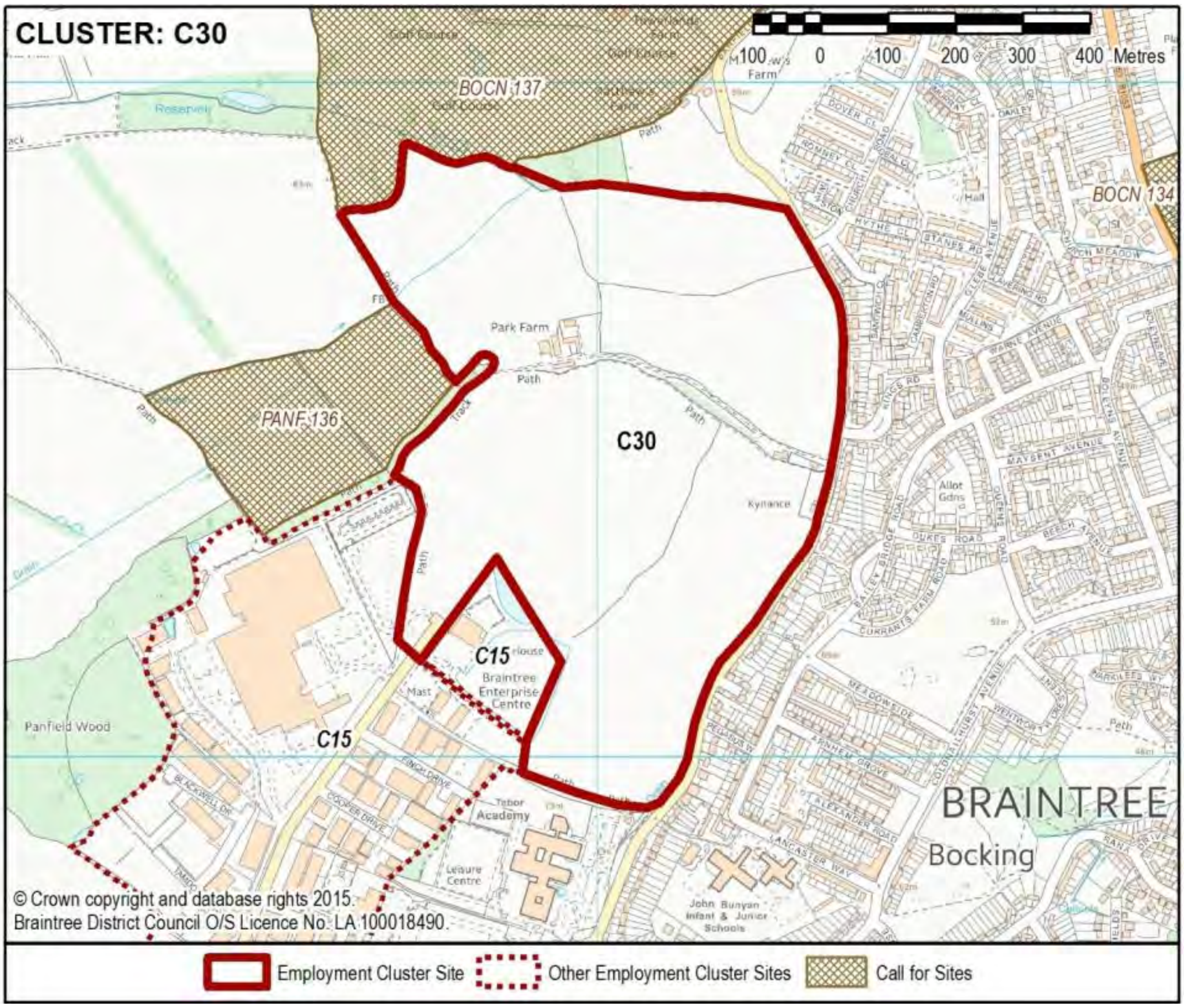
Summary and Key Characteristics	
Business uses: Local office. Unit typologies: Medium/large office spaces.	
Cluster quality and vacancy	Quality of environment / public realm: Good. Conditions of buildings: Good. Vacant and available floorspace: Vacant floorspace observed at Shelbourne House.
Cluster constraints	Access to facilities and amenities: Very good. Ecological issues: None. Bad neighbourhood uses: None. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading. Provision of Servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: None. Has any part of the site been redeveloped for residential / mixed use in the last ten years?: None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Shelbourne Road may be a suitable SME location. Suitable for wider industrial uses: None. Possibility for intensification/ redevelopment: None. Possibility for estate management: None.
ELNA Recommendation	C28a – retain for Business Uses. C28b – retain for Business Uses. C28c – retain for Business Uses. C28d – retain for Business Uses.

C29 –LYNDERSWOOD FARM



Summary and Key Characteristics	
Business uses: Local office and light industrial units. Unit typologies Local office space, workshop space (small and medium), yard space/open storage and small warehouse space.	
Cluster quality and vacancy	Quality of environment / public realm: Good and well maintained. Quality of buildings: Good, some very good. Vacant and available floorspace: Low.
Cluster constraints	Access to facilities and amenities: Very poor. Ecological issues: Mature trees and hedgerows surround the site. Bad neighbourhood uses: None. Physical site constraints: None.
Parking and servicing	Parking facilities: Dedicated parking. Parking provision: Adequate. Servicing of businesses: Off road loading/unloading, loading bays. Provision of servicing: Adequate.
Access	Strategic road access: Indirect. Access to public transport: Direct.
Cluster occupancy information	Vacant / derelict buildings: No derelict buildings, only a small number of vacant units. Has any part of the site been redeveloped for residential / mixed use in the last ten years? None. Presence of high growth sector occupiers: None.
Cluster suitability	Potential to provide lower cost industrial accommodation / accommodation for SMEs: Yes the business park caters very well for small businesses. Suitable for wider industrial uses: Land for transport functions, utilities, wholesale markets. Possibility for intensification/ redevelopment: Eastern portion of cluster has significant potential for intensification. It is currently used as open storage. Possibility for estate management: The business park is currently managed.
ELNA Recommendation	Continue as non-designated

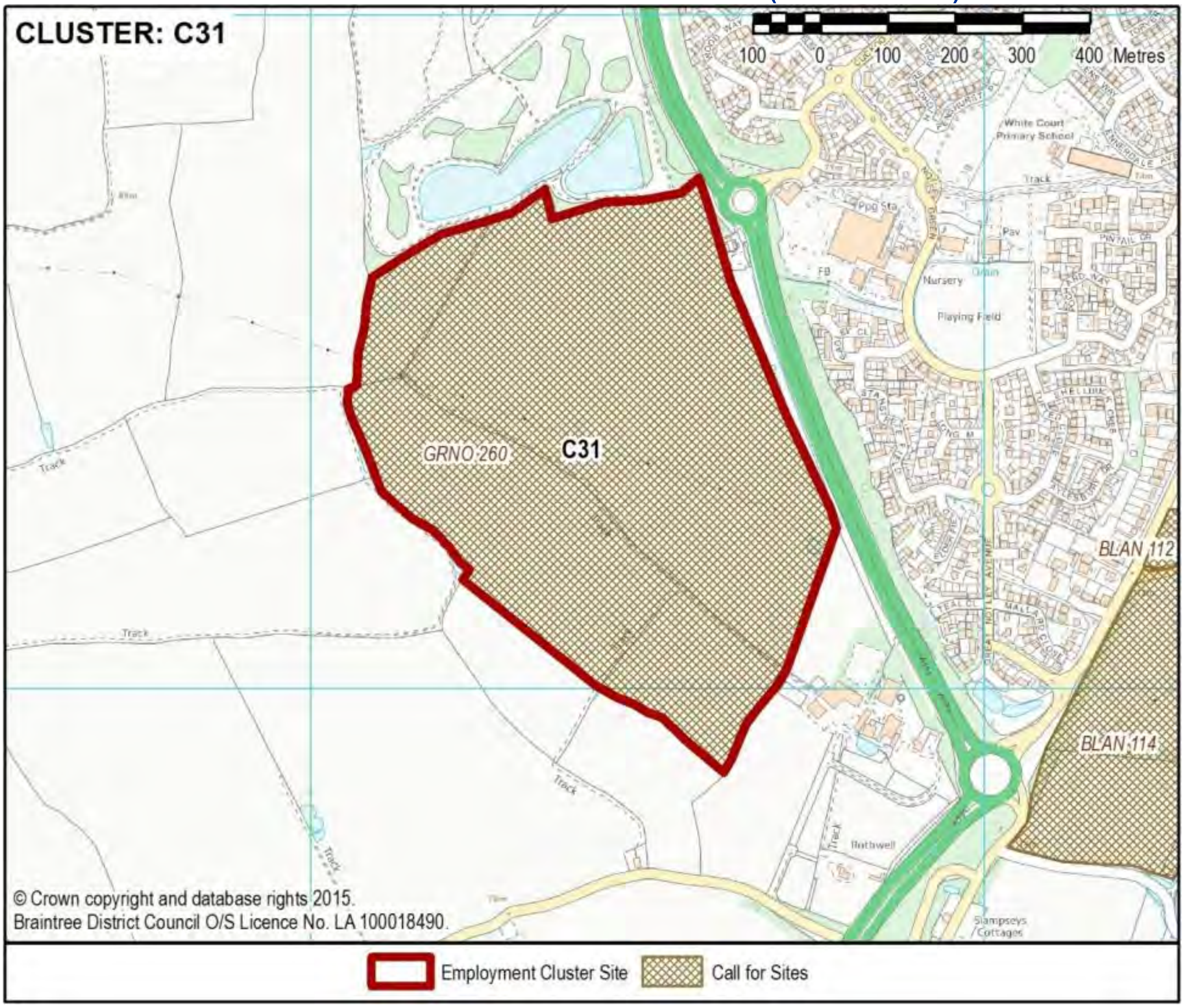
C30 – LAND TO THE NORTH-WEST OFF PANFIELD LANE



Strategic Site: Being a largely vacant site, currently used for agriculture, this cluster was assessed differently to the C1-28 clusters. This cluster has been assessed under section 4.13.

ELNA Recommendation	Part designate as Employment Policy Area.

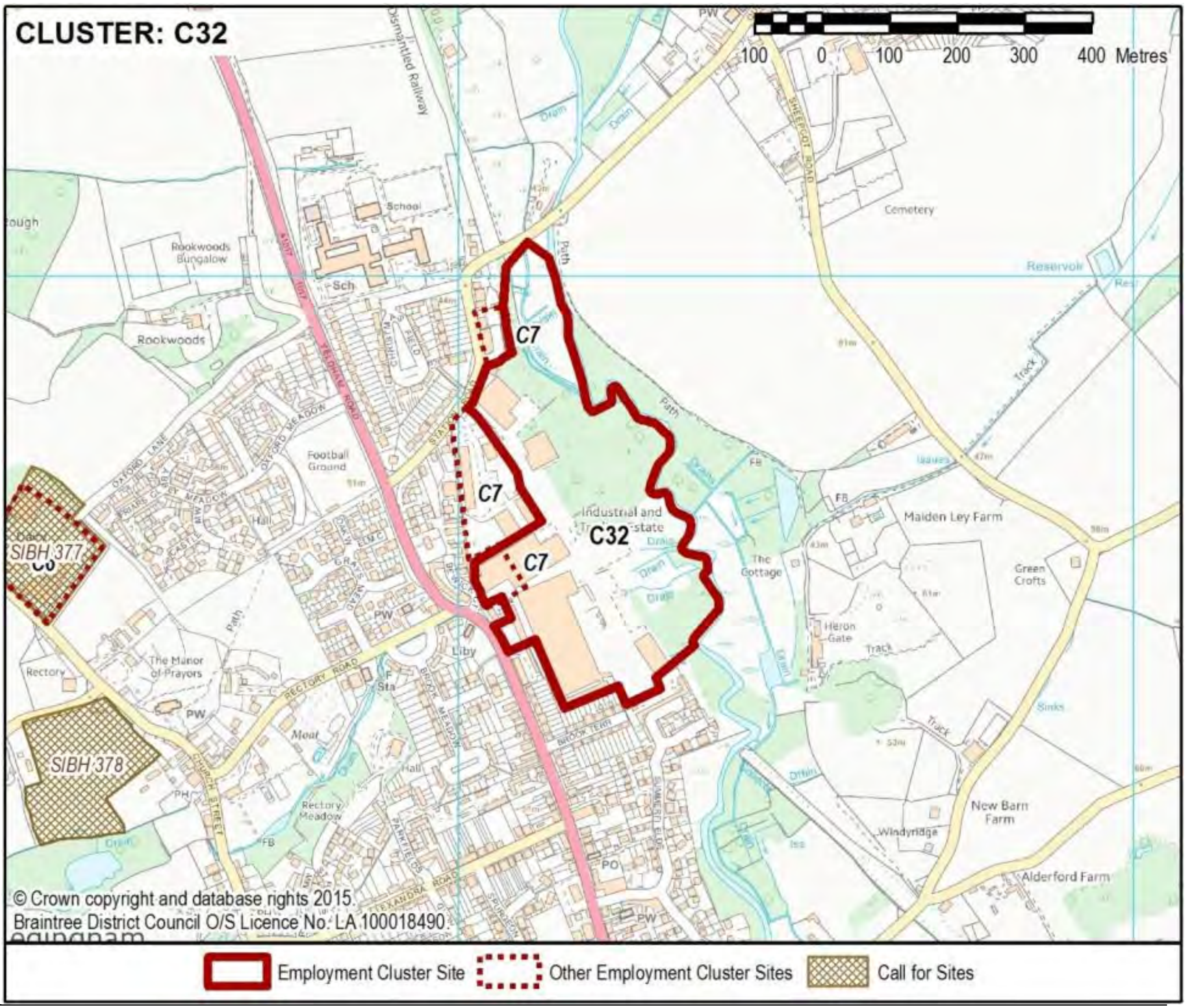
C31 – LAND TO THE WEST OF THE A131 AT GREAT NOTHLEY (EASTLINK 120)



Strategic Site: Being a vacant site, currently used for agriculture, this cluster was assessed differently to the C1-28 clusters. This cluster has been assessed under Section 4.12.

ELNA Recommendation	Part designate as Employment Policy Area.

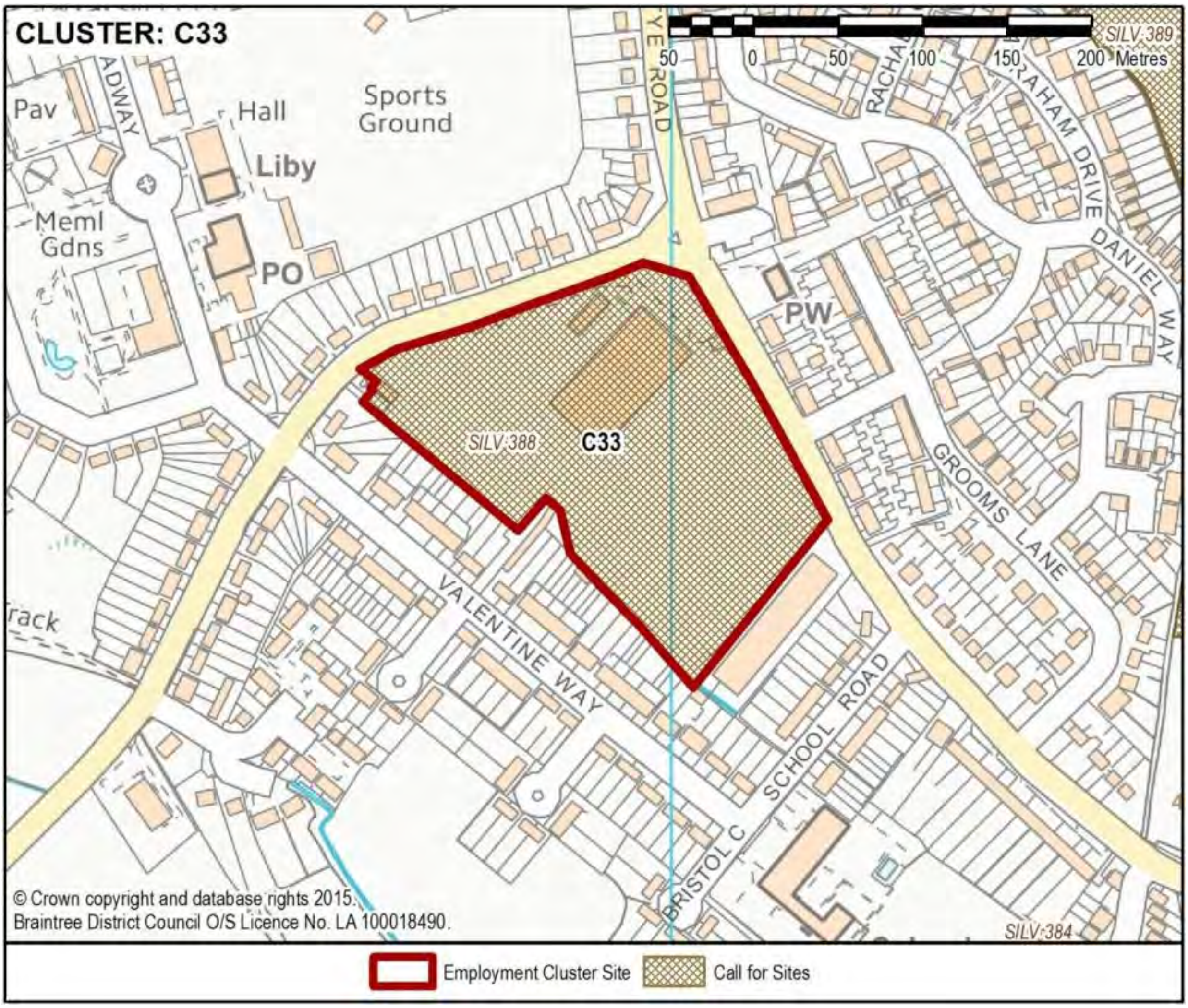
C32 – PREMDOR/ROCKWAYS REGENERATION SITE



Mixed Use Regeneration Site: This cluster has recently been developed for residential uses and other mixed uses. The potential for this site to accommodate additional employment land uses has been considered under Section 4.12.

ELNA Recommendation	No change.

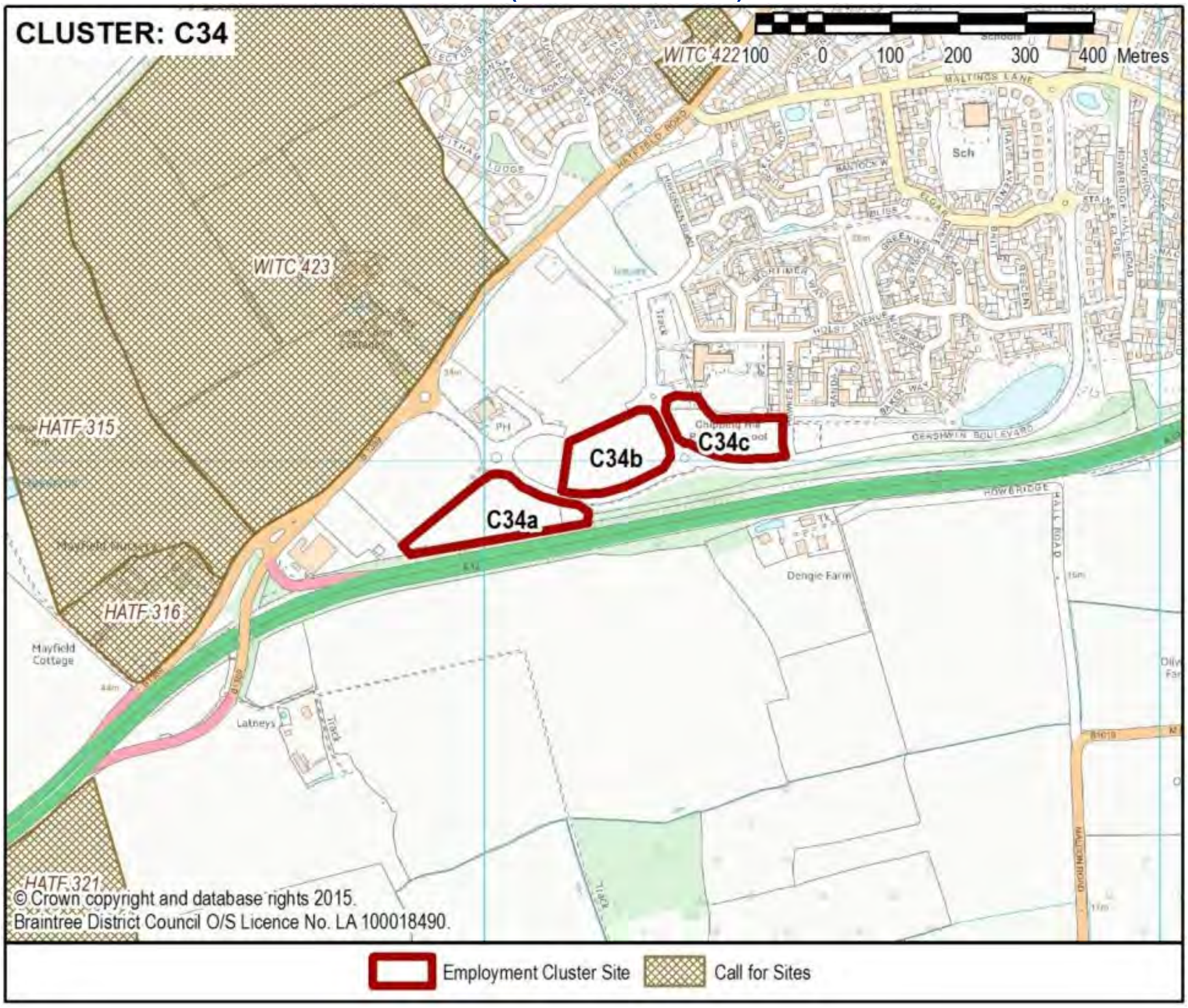
C33 – SILVER END REGENERATION SITE



Mixed Use Regeneration Site: The potential for this site to accommodate employment land uses has been considered under Section 4.12.

ELNA Recommendation	De-designate (so no longer 'Mixed Use Regeneration Site')

C34 – MALTINGS LANE BUSINESS PARK (GERSHWIN PARK)



Mixed Use Regeneration Site: The potential for this site to accommodate employment land uses has been considered under Section 4.12.

ELNA Recommendation	Retain designation for Business Uses.

APPENDIX B: CONSULTATIONS

Property Agents Contacted:

- Everett Newlyn
- Fenn Wright
- Joscelyne Chase
- Lambert Smith Hampton
- Taylor and Company

Stakeholders Contacted:

- Alphasense Sensors
- APC Solutions internet
- Bairds Malt
- Cofunds investment services
- Delamode
- Earls Colne Business Park
- Essex Chamber of Commerce
- Freeport Centre Manager
- Greenfields Community Housing
- Ignite Business Enterprise
- Manchester Airport Group
- Millbank Concrete Products
- RDC computers
- Realm Management Freeport
- Tiptree Jams
- Village Glass