New Local Plan Evidence Base

Economic Development Needs Topic Paper 2017

Rochford District Council localplan
Shaping the future together

Rochford District Council

Contents

1. Introduction

1.1 The five South Essex Local Planning Authorities (Basildon Borough Council, Castle Point Borough Council, Rochford District Council, Southend-on-Sea Borough Council, Thurrock Council) and Essex County Council, have agreed and endorsed a Memorandum of Understanding (MoU) which identifies how the authorities' will work together on cross-boundary strategic planning issues and the key outputs this aims to deliver. The South Essex MoU was formally signed by Rochford District Council on 22 March 2017. The cross-boundary strategic matters that have been agreed by the five South Essex LPAs and Essex County Council are likely to be detailed in a further MoU. This Topic Paper covers economic development needs.

1.2 As part of discussions at the South Essex Strategic Planning Officers group, South Essex Heads of Service group and South Essex Members group, work on a South Essex Economic Development Needs Assessment (EDNA) was commissioned to assess the needs of the South Essex area and identify a strategy going forward. Again, this evidence will help inform the preparation of a Strategic Planning and Infrastructure Framework for South Essex, alongside other evidence.

1.3 Consultants GVA were instructed by the five South Essex LPAs to complete a combined cross-boundary Economic Development Needs Assessment. The purpose of this study was to allow all participating Council's to work together to note sub-regional future trends and needs, which can be used to inform their Local Plans collectively.

1.4 The purpose of this topic paper is to present the key findings of the emerging South Essex Economic Development Needs Assessment (EDNA) 2017 as they relate to the administrative area of Rochford District. It should be read in conjunction with the new Local Plan: Issues and Options Document, the Infrastructure Delivery Topic Paper 2017 and other documents forming the evidence base for the new Local Plan.

1.5 The emerging EDNA notes that the economic opportunities for South Essex are considerable, based on its connections, labour force and land assets, including transport hubs like London Southend Airport and Tilbury. The EDNA notes that along with its own opportunities, South Essex can also be a major benefactor of businesses looking for alternative operational bases after being squeezed out of London.

1.6 However, the EDNA also highlights that economic success has not been uniform across South Essex and despite significant economic strengths; some parts of the sub-region have been underperforming. In addition, growth has not happened without impacts on infrastructure and environment. A strategy is therefore required to bring together growth opportunities across South Essex, ensuring the area acts like a functional economic hub rather than developing competing or conflicting propositions.

1.7 By distilling the key issues, forecasts and recommendations for the district of Rochford that arise from the emerging EDNA, a stronger appreciation can be made of the economic position of the district now and in the future. From this appreciation, planning policies can be devised which will act to facilitate this direction.

1.8 It should be noted that this Topic Paper seeks to present the findings of the emerging EDNA only. Whilst it may advocate a particular conclusion, this document forms part of the evidence base for Rochford District Council and is not a policy document in its own right.

2. National Policy and Legislative Context

National Planning Policy Framework

2.1 Section 1 of the National Planning Policy Framework (NPPF) is concerned with 'building a strong, competitive economy'. Paragraph 18 sets out the Government's overall intention to "securing economic growth in order to create jobs and prosperity, building on the country's inherent strengths, and to meeting the twin challenges of global competition and of a low carbon future". Paragraph 19 sets out that the planning system should not act as "an impediment to sustainable growth" and therefore "significant weight should be placed on the need to support economic growth through the planning system".

2.2 Paragraph 21 sets out the role for local authorities in promoting economic development. It is stated that they should "recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing". Through the Local Plan, there is the expectation that a Local Authority shall:

- Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- Set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- Support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be

flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement;
- Facilitate flexible working practices such as the integration of residential and commercial uses within the same unit'.

2.3 Paragraph 22 recognises the changing context of economic development, stating that "Planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities".

2.4 The NPPF recognises that the economy takes different forms and will require different interventions based on locality. Section 2 of the NPPF is concerned with 'Ensuring the vitality of town centres'. Section 2 contains a number of expectations through the Local Plan, including recognising "town centres as the heart of their communities and pursue policies to support their viability and vitality" and the need to "allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability".

2.5 Section 3 sets out Government expectations with regard to 'Supporting a prosperous rural economy'. Paragraph 28 states that "Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To promote a strong rural economy, local and neighbourhood plans should:

- Support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings;
- Promote the development and diversification of agricultural and other land-based rural businesses;
- Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the

provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres;

- Promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship".

2.6 With respect to the preparation of Local Plans themselves, Paragraph 158 of the NPPF states that "Local Plans should be aspirational but realistic. They should address the spatial implications of economic, social and environmental change. Local Plans should set out the opportunities for development and clear policies on what will or will not be permitted and where. Only policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan".

Building our Industrial Strategy, Green Paper, 2017

2.7 In January 2017, the UK Government produced a Green Paper entitled 'Building our Industrial Strategy'. Within it, a number of key challenges are identified. These include the need to continue to build on the UKs current strengths in technology and research which provide competitive advantages, and to ensure that every place meets its potential by working to close the gap between our best performing companies, places and people and those which are less productive. It is noted that Britain is one of the most centralised countries in the world, but that this has not led to places being uniformly prosperous. The Green Paper states that Government does not intend to direct the economy or determine the industries of the future. The role of the Government will be to identify the competitive strengths of the UK, explore with industry the ways in which the Government can help, and put in place institutions and relationships to sustain higher levels of productivity over the long term.

2.8 The third challenge is to make the UK one of the most competitive places in the world to start or to grow a business. It is stated that a modern British industrial strategy must make this country a fertile ground for new businesses and new industries which will challenge and in some cases displace the companies and industries of today.

2.9 The strategy identifies ten pillars to drive forward the industrial strategy across the UK economy, namely science, research and innovation, developing skills, upgrading infrastructure, supporting businesses to start and grow, improving procurement, encouraging trade and inward investment, delivering affordable energy and clean growth, cultivating world-leading sectors, driving growth across the whole country and creating the right institutions to bring together sectors and places.

Local Policy and Legislative Context

Rochford District local development plan

2.10 The local policy context for Rochford District will in future be informed by the emerging new Local Plan, which the emerging EDNA aims to inform. The new Local Plan will replace a number of the adopted policy documents which form the local development plan for the district and will set the strategy for the future development of the district beyond the current plan period, which runs to 2025.

Rochford District Economic Growth Strategy

2.11 The emerging Rochford District Economic Growth Strategy 2017[1] sets out a number of practical actions that are intended to assist local businesses to grow and develop, to promote new business start-ups, to nurture and inspire entrepreneurial talent, and to encourage existing businesses to relocate to Rochford District.

2.12 This Strategy does not sit in isolation but aligns with the objectives of Rochford District Council's Corporate Business Plan 2016-2020 and the adopted local development plan. The Economic Strategy incorporates the Opportunities South Essex (OSE) Growth Strategy, Essex Economic Plan 2014 and operates in tandem with the South East Local Enterprise Partnership (SELEP) Strategic Economic Plan 2014, which encompasses Essex, Southend, Thurrock, Kent, Medway and East Sussex. The Strategy also acknowledges the Governments' Industrial Strategy.

2.13 The following four priorities are identified in the emerging Rochford District Economic Growth Strategy:

- Supporting new businesses
- Growing and retaining businesses
- Encouraging inward investment
- Developing skills and employability

2.14 The Economic Growth Strategy is a 'living document' and will continue to evolve through conversations with partners, businesses and residents.

[1] www.rochford.gov.uk/sites/default/files/business_growthstrat_draft.pdf

Essex Grow-on Space Feasibility Study 2016

2.15 The Grow-On Space Feasibility Study[2] was commissioned by Essex County Council to explore whether a lack of 'grow-on' space is a substantial problem in the county of Essex and if so, what are the classes and sizes of commercial property that are lacking.

2.16 Whilst there is provision of incubation / start-up space in various forms across the county, there is anecdotal evidence to say that once established, businesses have struggled to find suitable properties to move onto from their incubation / enterprise centres / start-up spaces which also prevents established businesses from freeing up the units for other potential start-up businesses. The Feasibility Study found that there is a mismatch between the supply of, and demand for, grow-on space across the county, with both industrial and office space being in short supply. This shortage of grow on space is evident in almost all local authority areas in Essex, however, the imbalance was found to be particularly pronounced in Basildon and Rochford districts. The availability of grown on space in July 2016 was at a particularly low level in Rochford District with just 0.4 years supply of units.

2.17 The issue is not just about the quantity of grow-on space; however it is also about quality. The Feasibility Study found that much of the available grow-on space across the county is of relatively low quality whilst poor parking provision was also cited as a problem.

2.18 As a result of this Feasibility Study, the Essex Economic Commission, (an independent advisory body set up to help shape the economy in Greater Essex), produced a report entitled Addressing The Scarcity of Commercial Workspace in Greater Essex in July 2017. It is noted in the report that the new Airport Business Park in Rochford will alleviate some of the capacity issues by supplying 1,000 square feet of commercial development space, although this will not be until 2018 onwards.

[2] www.rochford.gov.uk/new-local-plan-evidence-base

3. Emerging South Essex Economic Development Needs 2017 - Implications for Rochford District

3.1 The consultancy firm GVA were commissioned by the five South Essex authorities of Basildon Borough Council, Castle Point Borough Council, Rochford District Council, Southend-on-Sea Borough Council and Thurrock Council to produce an Economic Development Needs Assessment (EDNA). The purpose of this EDNA is to present the South Essex economic picture, providing an evidenced, guidance compliant analysis of the economic and employment land opportunities and challenges for South Essex and establishing a strategic, multi-authority strategy for realising the area's economic opportunity.

3.2 The emerging EDNA notes that the economic opportunities for South Essex are considerable, based on its connections, labour force and land assets, including transport hubs like London Southend Airport and Tilbury. The EDNA notes that along with its own opportunities, South Essex can also be a major benefactor of businesses looking for alternative operational bases after being squeezed out of London.

3.3 However, the EDNA also highlights that economic success has not been uniform across South Essex and despite significant economic strengths; some parts of the sub-region have been underperforming. In addition, growth has not happened without impacts on infrastructure and environment. A strategy is therefore required to bring together growth opportunities across South Essex, ensuring the area acts like a functional economic hub rather than developing competing or conflicting propositions.

3.4 Providing a portfolio of land that maximises the use of existing or planned investments and infrastructure is considered key as is ensuring public resource requirements are minimised and privately delivered outputs maximised. Similarly, linking land and floorspace recommendations to an in depth understanding of market demand and occupier requirements should support businesses to be attracted to the area and, ultimately, provide the opportunity for increases in business rate revenue to be secured. This can create a virtuous circle of improvement and growth over the plan period.

3.5 For Rochford District the current employment evidence base document, the Employment Land Study Update 2014, provides a detailed up to date assessment of the authority's employment land position, which the EDNA complements by providing the more strategic level assessment within which the Employment Land Study sits. Both these documents will constitute the evidence supporting the emerging new Local Plan process as it progresses.

3.6 The future role and function of town centres together with a review of key trends likely to influence demand for new retail and commercial leisure floorspace has been undertaken for Rochford District and surrounding areas.

South Essex Context and Strategic Considerations

3.7 Whist this Topic Paper is considered primarily with the implications that the EDNA has with regard to Rochford District, it would be remiss to not acknowledge the wider spatial and economic context of South Essex.

3.8 South Essex sits within the wider East of England economy and is heavily influenced by London. There are strong regional connections through the strategic highway network and rail networks as well as waterfront logistics sites. These factors influence business location and have a positive impact on the labour market and particular sector strengths, such as logistics and port related activities. However, it is critical that further improvements to connections are secured in order to realise the potential economic growth of the area, including improvements to serve the rapidly growing London Southend Airport.

3.9 Strategic support for the South Essex economy is already under way, with the Economic Plan for Essex, submitted to Government by Essex County Council in partnership with the South Essex Local Enterprise Partnership (SELEP) in 2014. SELEP are the main regional influencing body for South Essex, a business led public/private body established to drive economic growth across East Sussex, Essex, Kent, Medway, Southend and Thurrock. The SELEP has established a Growth Deal which will combine local, national and private funding streams to focus on transport connectivity, business support / productivity, local skill levels, and housing and development in the South East. Almost £0.5bn of Government funding has been secured by the SELEP through this Growth Deal supporting the target of delivering at least 35,000 jobs and 18,000 new homes in the region to 2021.

3.10 The Economic Plan for Essex[3] underscores an ambition to deliver £1bn of investment by 2021. Key focus areas for investment in South Essex include a series of transport improvement schemes, and support for the London Southend Airport and Environs Joint Area Action Plan[4] (prepared by Rochford District and Southend Borough Councils) regarding the delivery of the Airport Business Park in Rochford. The Strategic Economic Plan for the SELEP[5] sets

[3] www.essex.gov.uk/Your-Council/Strategies-Policies/Pages/Economic-Plan-for-Essex.aspx

[4] www.rochford.gov.uk/london-southend-airport-and-environs-jaap-evidence-base-%E2%80%93-documents/london-southend-airport-and

[5] www.southeastlep.com/strategic-economic-plan

out advanced manufacturing, transport and logistics, life sciences and healthcare, environmental technologies and energy, and creative, cultural, media, and visitor economy activities as target sectors for growth. However, low productivity and skills, poor housing, and historic underinvestment in road transport capacity are identified challenges that the SELEP aims to overcome to support growth. The A13/A127 is one of four key growth corridors in the County that will continue to be a large beneficiary of the 2014 – 2021 investment plan.

3.11 Rochford District is also part of the Thames Gateway South Essex (TGSE) Partnership[6]. The TGSE covers an area that stretches along the north bank of the Thames, accommodating 54,000 businesses and 200,000 jobs. The Growth Partnership is seeking £196m from the Local Growth Fund to augment £400m of local authority funding that could ultimately leverage £6bn from the private sector. Four identified sectors are expected to deliver future jobs growth; advanced manufacturing and engineering, transport and logistics, environmental technologies and energy, and digital, cultural and creative activities.

3.12 Relevant to South Essex, the report published by the Essex Economic Commission in January 2017 'Enterprising Essex: Opportunities and Challenges'[7] identifies opportunity sectors to include advanced manufacturing, life sciences and healthcare, digital and creative services, logistics, low carbon and renewables, and to a lesser extent finance and business services. Opportunity South Essex (OSE)[8] is a private sector led partnership that forms part of the federated structure of the SELEP. The OSE aims to raise the profile of South Essex and to secure funding to unlock growth locations that will facilitate the delivery of new homes, jobs, places, connectivity, skills and education providers, and economic growth. However, challenges are found to include road and rail capacity, workforce supply, sector diversity, low local resident employment, low quality of place and environment, and a need for high quality and affordable housing.

3.13 The Essex Growth and Infrastructure Framework (GIF)[9] was prepared on behalf of the Greater Essex local authorities to provide a view of emerging development and infrastructure requirements to support growth from 2016 to 2036. Analysis with the document sets out an expectation for the population to increase to 2.1 million in 2036 from the current 1.8 million, with 79,000 new

[6] www.tgessex.co.uk/

[7] www.essexgrowth.co.uk/Portals/70/Essex_Economic_Report.pdf

[8] www.rochford.gov.uk/sites/default/files/se_growthstrategyFinal2016.pdf

[9] www.essex.gov.uk/Documents/GIF.pdf

jobs and a requirement to deliver nearly 9,000 homes annually. The framework also expects an infrastructure investment need of £32 billion to sufficiently enhance the road and rail network over the next 20 years. As other documents set out, much of this investment is required within the South Essex sub-region and the framework facilitates a cohesive strategy for the area north of the Thames that falls within the SELEP.

3.14 Other infrastructure investment programmes occurring through South Essex and the wider region from which South Essex will benefit include the £38.7m proposed by local authorities to continue investment in the real-time bus location and scheduling system together with smart ticketing. Underscored in the 2014 Economic Plan for Essex, £25m has also been committed to roll out superfast broadband across Essex. Noting concerns regarding the cost of energy, the role of renewables and energy conservation is being assessed in addition to Essex and Suffolk Water investing £150m to complete a scheme which will help to secure the water supply over the next 25 years. These are combined with numerous investments into various education programmes, including adult training, vocational training and skill developed for the long term unemployed. Despite sitting within a dynamic economic context, South Essex faces various economic challenges that impede productivity growth and hinder the sub-region's capability to compete with neighbouring areas. Like much of the UK, South Essex has experienced some loss of traditional manufacturing and distribution employment which has been poorly replaced in other low value industries. The area is also unlikely to see the relocation of back office functions on the same scale as in previous decades.

3.15 Recognising the role of London, the 'London Industrial Land Demand Study[10]', published in June 2017 for the Greater London Authority (GLA), provides an assessment of industrial land requirements in Greater London and projections of stock change between 2016 and 2041. This was released significantly after the analysis phase of the EDNA, meaning the implications of it have not been factored into the analysis or advice provided within the Study. However, it is mentioned here as it provides important context for the wider industrial market position in London and the South East, and will be important for the South Essex local authorities to consider going forward to determine the implications for developing a South Essex wide economic development strategy.

3.16 The study expects manufacturing and utilities to be the main industrial land functions that continue to see some relocation to outside Greater London, albeit at reduced rates than in recent years, with potential for accommodation to the north and east, in sub-regions such as South Essex. This reinforces the

[10] www.london.gov.uk/sites/default/files/ilds_final_report_june_2017.pdf

confidence that South Essex is well positioned to accommodate future employment growth being squeezed from London, considering the scale and location of the potential future employment land portfolio identified for South Essex which is well suited to accommodating these types of uses. These spillovers are however likely to affect areas of South Essex unequally and in different ways, requiring a coordinated approach to capturing benefits and mitigating negative impacts.

3.17 The post 2008 recession had a marked impact locally, and the return of values to pre-recession levels has been hindered by poor productivity. Further, socio-economic characteristics across the sub-region display some concentrations of deprivation and economic growth has shown significant spatial variation.

3.18 With regard to the current political climate, provisional findings have suggested that industries such as logistics, a sector specialism in South Essex, will be the first to suffer from the realignment of political and economic ties to the EU. As competition between UK regions increases, it is critical that the local authorities comprising South Essex co-ordinate and engage proactively in negotiations so that their constituents' voices are heard and to ensure economic opportunities are conferred to the sub-region.

3.19 Rochford District is also likely to be influenced in the future by some potentially significant regional changes. These include:

- Expansion of London Southend Airport and associated development through the London Southend Airport and Environs Joint Area Action Plan (JAAP);
- The establishing and continued development of the London Gateway Port;
- Major residential development within South Essex and in neighbouring Ebbsfleet;
- Residential market displacement from London, as value increases ripple through outer London;
- Proposals for a major leisure destination at Paramount Park in Gravesham, which may attract visitors and employees from South Essex;
- Major town centre regeneration within the sub-region and in competing centres in North Kent;
- Tourism and waterfront regeneration proposals, with attendant cost challenges;
- The construction and delivery of the Lower Thames Crossing, which saw a preferred route announced in April 2017

3.20 There is a further challenge in evidencing the need for an appropriate range of employment land sites in quantitative and qualitative terms, as undeveloped land allocated for employment uses is coming under increasing pressures to be permitted for residential development. Facilitating and supporting appropriate and effective mixed use development, incorporating residential and employment uses is another challenge to address, in order to meet both housing and employment objectives in the face of significant population increase.

Strategic Considerations for Rochford District

3.21 It is important to acknowledge the distinctions between the five authorities that form the South Essex sub-region at the outset. Castle Point and Rochford District, although different in spatial area, have similar population sizes, which are approximately half of that of Basildon, Southend-on-Sea and Thurrock. This population size distinction has a significant influence on industry, services and overall economic output, as does the spatial location of each authority. Each authority area also has a different industrial composition which, alongside economic output, is expected to continue to diverge. As previously highlighted, this topic paper concentrates on the implications of the emerging EDNA for Rochford District. Where the EDNA highlights issues relating to the JAAP, these are only captured in this paper where they are explicitly linked to Rochford District.

3.22 Rochford District has a constrained transport system that in part results from the more rural and less densely populated character of the authority area and its distance from London. Rochford District is likely to see improvement through investment on the A127 and as part of £20 million committed to delivering a new business park proximate to London Southend Airport. Broadband connectivity is also a highlighted concern, particularly for rural areas, that is seeing £25million in investment across Essex.

3.23 Town Centre regeneration is considered a core issue in the district, and Area Action Plans (AAPs) for Rochford, Rayleigh and Hockley town centres have been produced and adopted. The District's town centres contain a good range of shops, services and facilities to meet the needs of local communities and units do not remain empty for extended periods of time. Certain existing employment allocations have been de-allocated to encourage a mix of onsite uses, particularly for sites which are currently under-utilised, and new allocations have been made through the currently adopted local development plan to accommodate any displaced employment uses and support employment growth in the District.

3.24 A joint Employment Skills and Business Group, part of the Local Strategic Partnership, between Rochford District Council and Castle Point Borough

Council have agreed an action plan that aims to include local stakeholders to promote skills and education. Rochford District Council is also a key stakeholder in the both the River Crouch Coastal Community Team which aims to promote continued economic prosperity for both the River Crouch and River Roach, and the Essex Rivers Local Action Group, where both support rural businesses and rural diversification.

3.25 Strategic development is also likely to benefit local firms, namely those within the JAAP Airport Business Park where a planning application has been granted to develop an ‘innovation centre’. The Innovation Centre will create a modern environment for growing businesses to locate into flexible and serviced office and workshop space which can grow to accommodate changing needs. Whilst the intended focus is around medical, aviation and high-end engineering businesses, the centre will also provide networking and collaboration opportunities for the whole business community.

3.26 As one of the more rural parts of the Thames Gateway, ‘green tourism’ is promoted in the District. The redevelopment of the RSPB Wallasea Island site, utilising materials bored during Crossrail tunnelling to restore the historic wetland habitat is also a unique attraction that supports the Rochford District tourism offer.

4. Socio Economic Baseline

4.1 The emerging EDNA presents a comprehensive socio-economic profile for each of the South Essex authorities. This topic paper will focus on those socio-economic areas where Rochford District data returns represent outliers when compared to the rest of South Essex, or where the South Essex as a whole differs markedly to national averages.

Socio-Economic Baseline for Rochford District

4.2 Analysis of 2011 Census data shows that Rochford District has the joint lowest proportion of residents aged 16 – 64 (62%) in South Essex and the second highest proportion of those aged 65 and over (20%). The former statistic is shared with Castle Point Borough, with Castle Point Borough also recording the highest proportion of those aged 65 and over as part of their total population. The equivalent figures in South Essex / nationally are 64% / 65% and 17% / 16%.

4.3 In terms of those aged 16 – 64 (the working age population), at 80.1%, Rochford District reports the joint highest proportion of people who are economically active. This statistic is a good barometer of health as it includes those who are working as well as those actively seeking employment. 12.3% of Rochford District residents are self-employed, which is the second highest in the South of Essex, whilst at 4.1%, the proportion of working age people unemployed is the lowest in South Essex. Across the period 2005 – 2015, Rochford District residents reported the lowest Job Seekers Allowance claimant rate, which in 2015 was approximately half of those areas with the highest claim rate.

4.4 South Essex has low skills levels. The sub-region has higher levels of residents with no qualifications and level 1 and 2 qualifications than the County, region and country yet lower levels of residents with level 3 and level 4 qualifications. Rochford District has the highest proportion of residents with level 3 qualifications and the second highest with level 4 qualifications in South Essex. Both are however below the national average.

4.5 Occupation structure appears to tie to both education and age structure. In the case of Rochford District, educational attainment is relatively higher than the South Essex average and therefore the proportion of residents in higher value added occupations is higher than the South Essex average. Rochford District contains the highest proportion of ‘managers, directors and senior officials’ in the county and the second highest in ‘professional occupations’. Median workplace earnings are below median residential earnings, meaning that generally those in higher value jobs who live in Rochford District commute outside of the district. Both workplace and residential earnings are marginally above the South Essex average.

4.6 Rochford District has the second lowest job density in South Essex. Low job density, if left unchecked, has the potential to form a feedback loop with out-commuting, as one re-enforces the other.

4.7 At £1,148.5m, Rochford District's 2014 GVA output is the lowest in South Essex whilst its 2014 GVA output per capita (£13,547.5) was the second lowest. The district has seen a growth in GVA output between 2001 and 2014 of 13.3%. This is the third highest in South Essex but below South Essex (19.8%), Essex (24.4%) and the United Kingdom (23.3%).

4.8 The business demography in Rochford District is skewed more to micro (0-9 employees) businesses than small (10 – 49), medium (50 – 249) and large (250+) businesses when compared to South Essex, Essex and England. 18% of businesses are involved in construction, 16.1% are in the professional, scientific and technical sector and 8.5% are in retail. These are the top three sectors in South Essex as a whole as well as within Rochford District. Variation in business survival rates is evident across South Essex, with Rochford District achieving the highest survival rate at 50% whilst other authorities are in the low 40s.

5. Commercial Property Market Review

5.1 To understand how the property market itself may influence future floorspace provision, the emerging EDNA considers market performance in terms of deals completed (space take up) between June 2010 and June 2015 and advertised space (vacancies). Existing availability data is based on the time of analysis in June 2016.

5.2 The CoStar database used for this exercise seeks to record actual market activity (i.e. the 'turnover' of occupiers and premises) and as such the majority of lease renegotiations and extensions are not included. It should be noted that the CoStar database relies on the participation of agents to maintain its accuracy; as such a number of smaller deals may not be captured. However, it provides a consistent and robust record of the predominant market trends from which the market can be understood.

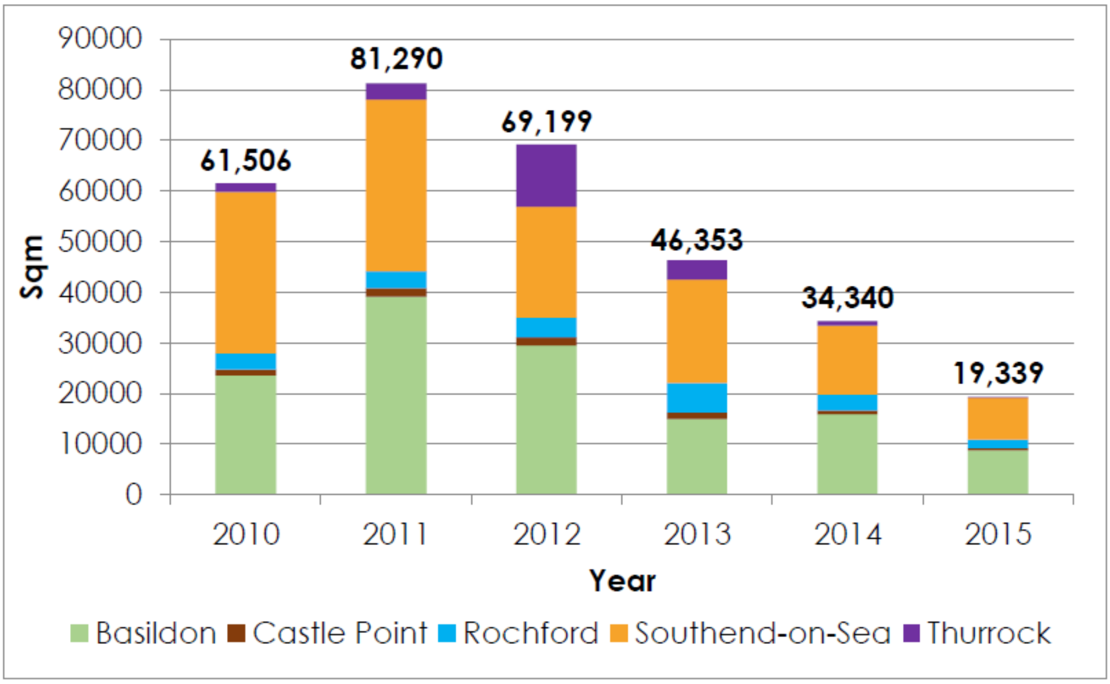
South Essex (including Rochford District) Office Market

5.3 Generally the rental trends in an area are driven by factors such as general market condition, demand and supply, locational factors and the nature and quality of the stock. The existing office stock throughout South Essex tends to be of secondary / poor quality. Across South Essex, Rochford District is considered to have the highest demand/under-supply of office space. Office space spends less time on the market than in any other administrative area (12.1 months compared to a South Essex average of 16.9 months) although vacancy rates, at 5% across a five year average, is higher than the South Essex average of 4.6%. This may be related to the quality of existing stock.

5.4 Across South Essex, the largest proportion of office lettings across the five years was for space of below 185 m^2, which was the smallest size band assessed (80.3%). The smallest size band was let at least four times that of the next largest band across the period assessed (2010 – 2015). However, whilst the number of letting deals was much lower, the total floorspace let where each deal involved office space greater than 1,850m^2 equated to a much greater floorspace in total in 2015 (4,169m^2 compared to 15,049m^2) but across the period of study, the difference was marginal (27,794m^2 for lettings less than 185m^2 between 2010 – 2015 and 26,209m^2 for lettings over 1,850m^2 between 2010 - 2015). The average deal size was approximately 200sqm, which would suggest that the average business occupying space within the sub-region was small, most likely around 20 employees (based on average occupier densities).

5.5 Average rent was also highest at either end of the size band spectrum. It should be noted however that, in general, smaller units tend to achieve higher rents on a £ per m^2 basis. They are often let on flexible lease terms which command a premium and service charges are often included in the rent. The significantly higher rents achieved on sub 185m^2 units may therefore be in part a consequence of their small size, rather than a direct indication of demand.

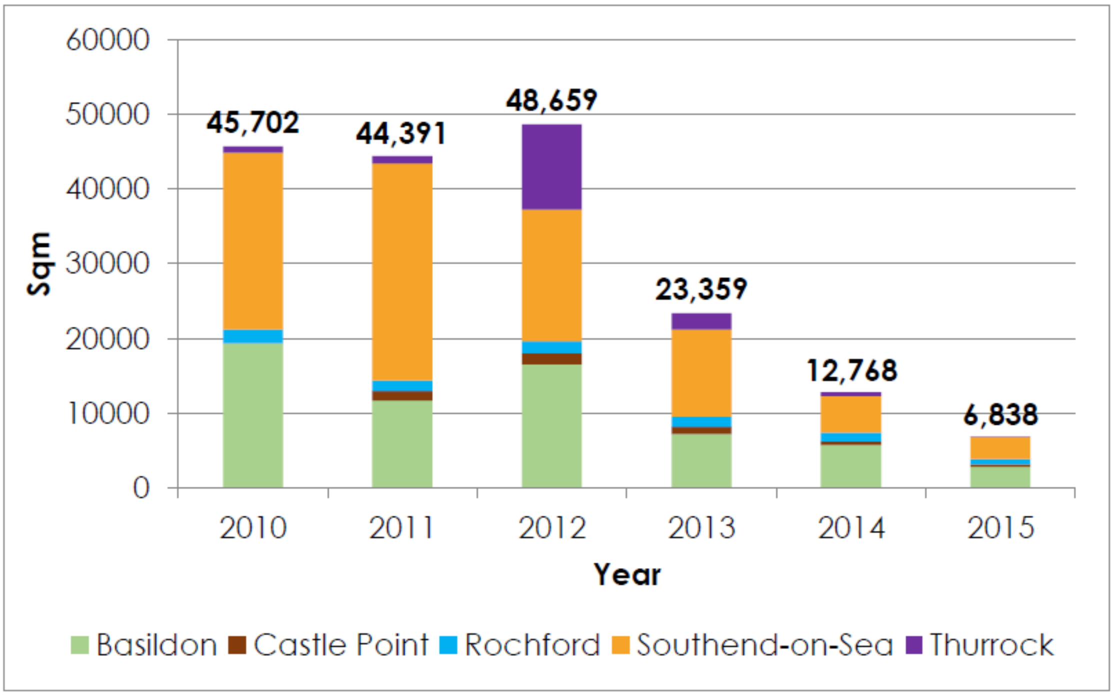
Figure 1: South Essex Available Office Space (m^2), 2010 – 2015



Source: CoStar 2016

5.6 A decline in available floorspace could imply a recent increase in demand and this is corroborated by the fact that there has been an increase in letting activity between 2010 and 2015. Aligning with patterns across the southeast, a fall in available office floorspace is also likely to be the result of changes from offices to residential use as part of permitted development.

Figure 2: South Essex Vacant Office Floorspace (m^2), 2010 - 2015



Source: CoStar 2016

5.7 Vacant office space is categorised as that which is available for use but is not currently occupied. The amount of office use which is vacant has reduced at a quicker rate than the overall reduction in available office space. Again, this suggests an increasing demand for such space.

South Essex (inc Rochford District) Industrial Market

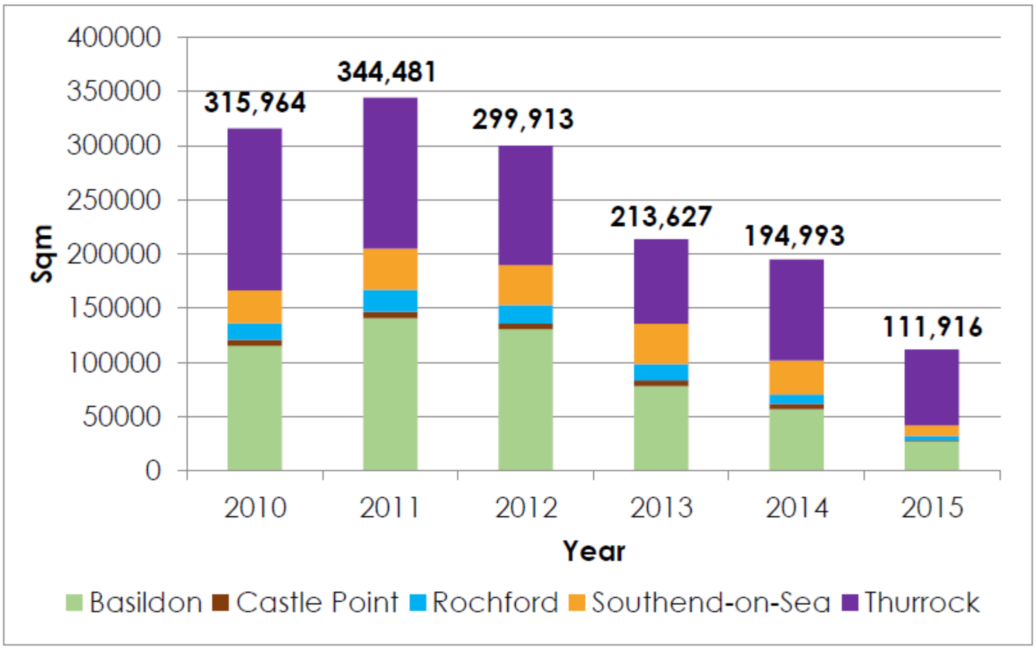
5.8 Generally the rental trends in an area are driven by factors such as general market condition, demand and supply, locational factors and the nature and quality of the stock. The existing industrial stock throughout South Essex tends to be of secondary / poor quality.

5.9 Industrial stock in Rochford District spends on average 12.4 months on the market (based on a five year average) which is the second lowest across South Essex and below the Essex average of 15.8 months. However, at 6.4%, the vacancy rate (based on a five year average) is 6.4%, the highest in South Essex and therefore above the average of 5.8%. Asking rents are also below the South Essex average.

5.10 The largest proportion of lettings across the five years within South Essex was for spaces between 185m^2 and 464m^2 in size (37.3%) although lettings for space above 1850m^2 comprised the largest total amount of floorspace let over the 2010 – 2015 period across all bands.

5.11 Averaged rents per m^2 were higher for smaller units across South Essex, suggesting higher quality or demand for smaller units. It should be noted however that, in general, smaller units tend to achieve higher rents on a £ per m^2 basis. They are often let on flexible lease terms which command a premium and service charges are often included in the rent. The significantly higher rents achieved on sub 185m^2 units may therefore be in part a consequence of their small size, rather than a direct indication of demand.

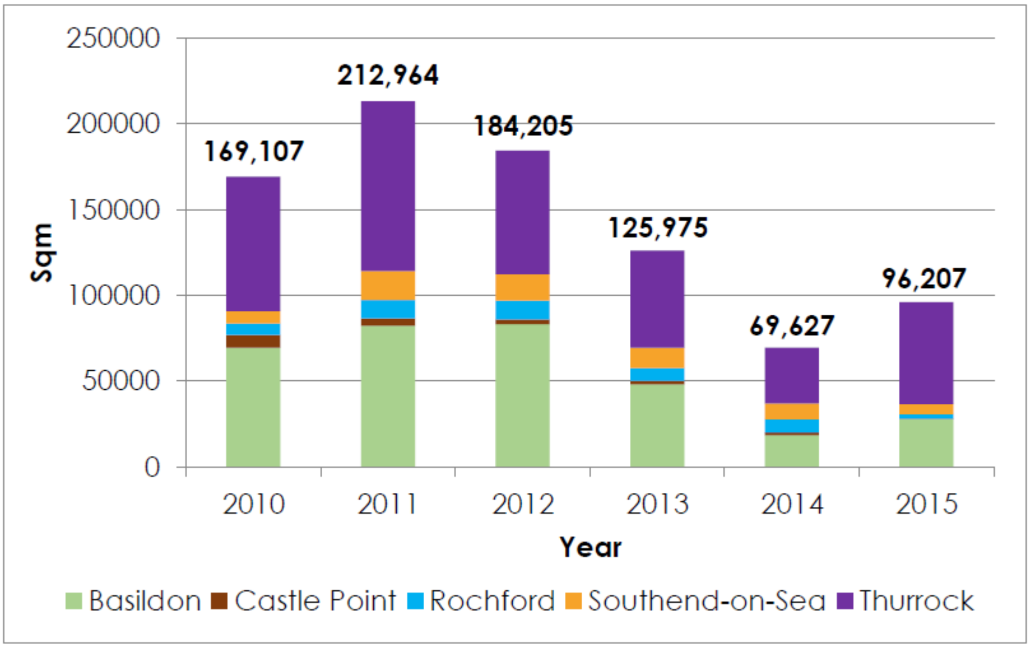
Figure 3: South Essex Available Industrial Floorspace (m2), 2010 – 2015



Source: CoStar, 2016

5.12 Since peaking in 2011, available industrial floorspace has fallen year-on-year, with the amount available in 2015 recorded as approximately a third of that available in 2010. The decline in available floorspace implies an increase in demand.

Figure 4: South Essex Vacant Industrial Floorspace (m2), 2010 – 2015



Source: CoStar, 2016

5.13 The total amount of vacant industrial land in South Essex has decreased across the period of assessment, with the current amount of vacant land being approximately half of that recorded in 2011. There was however a recorded increase in vacant industrial land between 2014 and 2015. This increase in South Essex is however dominated by data returns from Thurrock Borough. Within Rochford District, the amount of vacant industrial land was at its smallest in 2015 across the assessed period, 2010 - 2015.

6. Baseline Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

6.1 The emerging EDNA presents a SWOT analysis for South Essex. Many of those issues raised apply to Rochford District and as such the results of that assessment are reproduced here.

Economic Portrait of South Essex

6.2 The SWOT analysis builds on the economic portrait of South Essex, which is characterised as follows:

- Each of the authorities that compose South Essex have significant employment in distribution, hospitality, public sector activities, and professional services;
- A diverse manufacturing sector is present in South Essex, ranging from basic chemical production in Thurrock to the manufacturing of agricultural equipment and vehicles in Basildon;
- Each of the authority areas saw recessionary impact in terms of unemployment, GVA output loss, and business formation and survival rates;
- Each of the authorities currently has a GVA per capita output that falls behind the national average, yet Basildon greatly outperforms other authorities in South Essex;
- There is a weaker role for higher value sectors that drive growth, such as financial services and ICT;
- The highest proportion of lettings of office space in South Essex is for smaller units (below 185m^2). Smaller units have high rents and quick letting times, suggesting higher demand;
- The highest proportion of lettings of industrial space in South Essex is for smaller units (below 465m^2). These units have higher rents and typically quick letting times, again suggesting high demand;
- Although South Essex is seeing investment in industrial floorspace, particularly at the London Gateway site, a shortage exists of good quality office stock which is identified as a major barrier to growth and investment;
- Across South Essex, vacant and available industrial and office floor space has fallen over recent years and occupancy rates have risen.

Strengths

- A strong position on the regional highway, rail networks and established distribution roles, with a significant focus for infrastructure investment;
- A local passenger airport, London Southend, which is seeing investment and supports a collection of proximate businesses;

- Defined logistics and manufacturing locations;
- Proximity to the largest concentration of population in the UK and proximity to London, which is expected to grow by 1.5 million people in coming decades;
- A sizeable population of young people and a growing working age population;
- High economic activity and falling unemployment rates;
- A culture of entrepreneurship with high business start-up rates;
- There is healthy demand for both office and industrial units;
- Large industrial units becoming available as part of and near the London Gateway site, in addition to the TEP/Tilbury 2 ports, represent investment in the wider logistics sector and continues to entrench strength in the sub-region.

Weaknesses

- The economic base has been focussed on lower value, less knowledge intensive activity, which is a weak foundation for economic growth;
- There are generally lower skills levels in the local workforce than in benchmark areas;
- Further, high-skill jobs that are available in the sub-region tend to be taken up by labour commuting into South Essex rather than residents;
- South Essex suffers from areas with high levels of deprivation;
- The sub-region has a poor containment rate of its labour force with significantly lower values for each of the individual local authorities and loses most of its highly skilled workers to the central London boroughs;
- An over stretched and congested strategic road network, with poor north/south connectivity between strategic employment sites and urban centres, and a lack of HGV parking facilities.
- The rail network also sees delays, with local calls to deliver dual tracks and electrification, and a need to improve rail and bus interchanges to support an uptake in use of public transport.

Opportunities

- Proximity to London presents opportunities to capture families and businesses relocating to avoid increasing costs;
- Co-ordinated political impetus and investment throughout the Thames Gateway is set to support local growth sectors;
- An additional Thames Crossing linking South Essex to North Kent would enhance logistics positioning and increase the labour-market catchment;
- The delivery of a new airport business park and further growth in London Southend Airport.

- Potential for growth in the local tourism market, particularly in the resort of Southend.

Threats

- The current economic and political climate may put added strain on sectors which play a prominent role in the South Essex economy, such as logistics;
- Risk of lower performance than neighbouring areas, such as North Kent, with growth in office employment staying in London or being captured by centres outside of South Essex and continued contraction of the manufacturing base.
- The early stage of Lower Thames Crossing proposal makes it difficult to assess its impacts and influence on economic opportunities and existing and potential employment land.
- Underinvestment in local infrastructure that poorly accommodates investment in development locations and on key/new routes.
- Potential strain on workforce availability and access to employment opportunities, magnified by poor infrastructure and access to employment locations alongside poor training opportunities and jobs/skills mismatch.
- Limited affordability, range and quality of housing which acts to constrain investment and the attraction of a diverse labour pool.

7. Employment Land Supply in Rochford District

7.1 This chapter of the emerging EDNA considers the supply of current and potential employment sites across Rochford District. The assessment of the supply portfolio is based on desk and site based surveys of employment sites in Rochford District to identify the key characteristics of their site clusters.

7.2 The information was sourced by Rochford District Council and GVA reviewed these site lists and confirmed the sites included within this assessment with the authority. In line with PPG guidance, analysis has focused only on sites that are greater than 0.25ha in scale. Potential employment sites include those which are not currently occupied; but which have been allocated for employment use, have planning permission for employment uses, have been previously assessed for employment use or have been put forward for employment use as part of the Council's Call for Sites processes.

7.3 Each of these sites were subjected to a desk based analysis and site visit and scored against a range of criteria including character based on current occupiers, building age and quality, neighbouring uses, internal circulation and on-site amenities. Sites were then categorised to advise on future action. These were scored based on a traffic light system and amalgamated to provide a general overview of the employment site. It is noted that red scores do not mean that the site is unsuitable. Not all occupiers require 'Grade A' premises and/or the site may be the only appropriate site for a particular use. Further details around nuances in the site assessment are provided within the emerging EDNA.

Employment Land Supply Portfolio in Rochford District

7.4 The employment sites in Rochford District can be split into six sub-market areas, as shown on the map below. This details the following employment clusters:

- London Southend Airport Cluster (red)
- Purdeys Cluster (orange)
- Great Wakering Cluster (blue)
- Wallasea Island Cluster (purple)
- Southend Arterial Road Corridor (green)
- Rural Cluster: Rayleigh, Hockley & Ashingdon (yellow)

7.5 There are 10 active allocated employment sites included within the assessment of Rochford District's employment land supply, totalling approximately 112ha of existing land. This represents 8% of South Essex's total employment land stock.

Table 1: Rochford District Site Cluster Existing Site Totals

Cluster	Number of Sites	Site Area	% of Rochford District Total
London Southend Airport	2	36.9ha	33%
Purdey's	3	38.54ha	35%
Great Wakering	0	0ha	0%
Wallasea Island	2	20.14ha	18%
Southend Arterial Rd	1	13.15ha	12%
Rayleigh, Hockley, and Ashingdon	2	2.81ha	3%
Rochford District Total	10	112ha	100%

Source: emerging South Essex EDNA, GVA, 2017

7.6 The summary findings for each employment site in Rochford District is presented in Appendix A of this topic paper. A more detailed assessment will be available in the Rochford Site Assessment Matrix in Appendix 1 of the emerging EDNA, once published. Site plans for both existing and potential employment sites will be presented in Appendix 3 of the emerging EDNA. These appendices include site codes for all existing and potential employment sites.

7.7 It should be noted that whilst the Eldon Way site (R14) includes Foundry Business Park, and accommodates some existing B class uses (albeit with significant trade counter and leisure creep) it is not included as an *existing* employment site within this assessment (and as such is not included in Appendix A). This is because, in line with the Council's Employment Land Study Update 2014 (ELS), it is identified as an area of significant change and redevelopment within the 2014 Hockley Area Action Plan (AAP) as part of a mixed use vision for this location, which will maximise its role in the town centre, and use its location to attract new B class start-up and SME activity. This activity will differ from the current activity on site, so it is therefore instead categorised as a *potential* employment site for B1/B2 use, and discussed in that context.

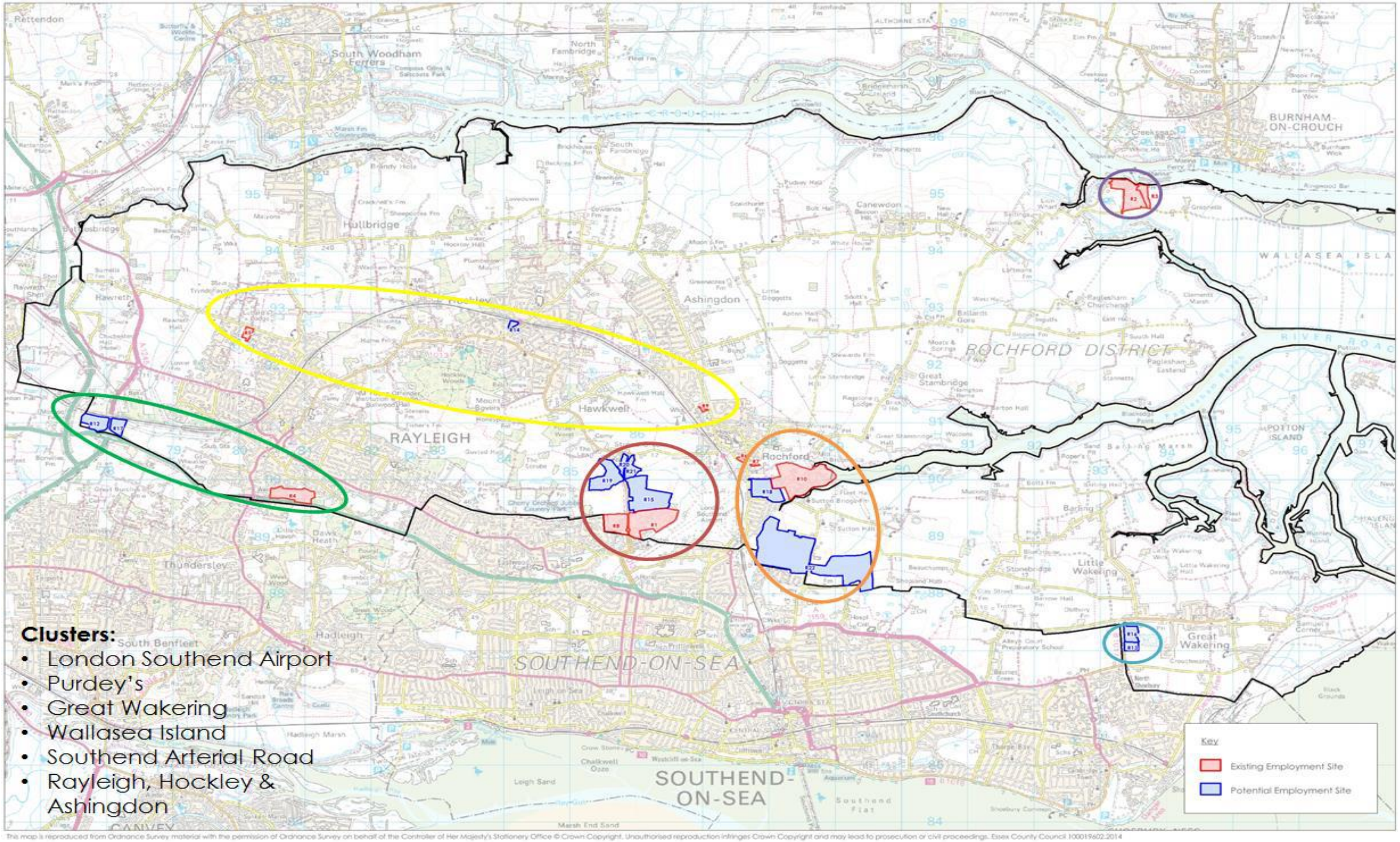
7.8 There are a further two sites (Star Lane Great Wakering and Rawreth Industrial Estate) which accommodate B class employment activity, but which have both been de-allocated from employment to residential use in the Council's 2014 Allocations Plan. These sites total approximately 12ha and when added to the ten site total, increase the total land figure to approximately 124ha. These sites are yet to come forward so an important consideration will be their potential for retention and re-allocation for employment use. The residential suitability of the sites is being explored in Rochford District Council's current Strategic Housing and Employment Land Availability Assessment (SHELAA).

7.9 The residential allocations remain in place for both sites. The sites have not yet fully come forward for new residential development, so it will be important for the Council to consider their potential for retention and re-allocation for employment use if required (with the residential suitability of the sites being explored in Rochford District Council's current SHELAA work). However for certain parts of the sites, such as the Star Lane Brickworks site in the southern half of the Star Lane site, there is new residential development coming forward on site (116 unit scheme – planning permission ref: 12/00252FUL) and the employment activity has therefore already been lost.

7.10 One other site (Stambridge Mills) was also de-allocated but is not included as it no longer accommodates active employment uses.

7.11 It should be noted that two sites have been allocated in the Council's 2014 Allocations Plan for employment use to compensate for the de-allocation of Rawreth and Star Land Industrial Estates (R12 and R13 as shown in Figure 5) and a further site has been allocated in the London Southend Airport and Environs JAAP (R15 as shown in Figure 5), however none of these sites are yet in active employment use.

Figure 5: Rochford District Overview Map: Existing & Potential Employment Clusters



Source: emerging South Essex EDNA, GVA, 2017

Characteristics of Rochford District's Employment Clusters

7.12 The characteristics of the site clusters identified within Table 1 are discussed below:

Purdey's Cluster (R10 - Purdey's Industrial Estate, R6 - Locks Hill, R7 - Riverside Industrial Estate)

7.13 The Purdeys Cluster includes three of Rochford District's active employment sites, including the largest in the District (R10 - Purdey's Industrial Estate). The smaller sites offer good quality units accommodating B1 office and light industrial activities, and are considered to be of good overall quality. These should be protected and maintained. The Purdey's site has a mixed quality offer, with some dated stock. It is recommended to be monitored as a result of the encroachment of some non-B class uses on the site and the poor condition of units, which lack maintenance and investment. Whilst the sites within the Purdey's cluster accommodate certain significant occupiers, the cluster is not assessed as a strategically important offer or opportunity to contribute to achieving the strategic growth aspirations for the South Essex sub-region.

Great Wakering Cluster

7.14 The Great Wakering Cluster does not include any existing employment sites allocated for employment use, however it includes the Star Lane site (which was re-allocated to residential in the Council's 2014 Allocations Plan), with an area of 5.8ha. The potential employment site, R13 - land south of Great Wakering, is also found within this cluster, a potential site allocated to accommodate uses re-located from the Star Lane site.

7.15 The Star Lane site remains partly in active B class employment use, however the south of the site, the former Star Lane Brickworks, is now coming forward for residential development (planning application ref: 12/00252FUL). There is a mix of B1, B2 and B8 employment activity accommodated on the northern part of the site (Star Lane Industrial Estate) with generally locally focused business occupiers, and the units on site are of mixed age and quality. The site is considered to be of average overall quality for employment use.

7.16 Despite there being an allocated potential site to accommodate existing business occupiers from the de-allocated Star Lane site, this re-location is yet to be required. Considering that the Star Lane site continues to function adequately as an employment site, and there has as yet been no residential development interest in the site, the Council could consider re-allocating the site for employment use to support its existing activity. However, this should be considered in combination with the findings of the Councils' latest SHELAA to understand the impact of this on the balance in meeting residential and employment land requirements in the district.

7.17 If the existing Star Lane site were to be reallocated the newly allocated land south of Great Wakering (R13) may no longer be required to accommodate employment uses. However, its location immediately south of the Star Lane site means it could provide the opportunity to accommodate future expansion or clustering of similar employment uses. Its requirements and role for accommodating employment use should therefore be monitored over the projection period.

Wallasea Island Cluster (R2 - Baltic Wharf, R3 - Essex Marina)

7.18 The Wallasea Island Cluster includes two adjoining sites with port related activities, largely incorporating B8 storage and distribution. There is a wood treatment facility on Baltic Wharf and boat storage, sales, repair and maintenance activities on Essex Marina. The stock on these sites are of poor to average quality, with the site having poor road connectivity and access to services and amenities, particularly broadband and public transport connectivity. The sites are not strategically important to South Essex but are well placed to support local industry and should be maintained.

Southend Arterial Road Cluster (R4 - Brook Road Industrial Estate)

7.19 The Southend Arterial Road Cluster consists of an existing employment site and two potential sites allocated for employment. Brook Road provides a mix of B2 and B8 activities, with local and regional occupiers accommodated in generally dated, average quality stock. The site could benefit from investment to improve the highways and building stock. This could help to combat the creep of leisure uses on site.

7.20 The potential employment site R12 (Michelins Farm) is allocated in the Council's 2014 Allocations Plan to compensate for the de-allocation of Rawreth and Star Lane Industrial Estates. As for potential site R13 in the Great Wakering Cluster, the newly allocated potential site R12 has not yet come forward, so if the Rawreth Industrial Estate site is re-allocated it may no longer be required. However, its location with good strategic road network connectivity means it is well suited to accommodate employment growth, so its requirements and role for accommodating employment use should therefore be monitored over the projection period.

7.21 The potential site R17 is a greenfield site which has come forward for potential employment use through the latest Call for Sites process.

Rayleigh, Hockley & Ashingdon Cluster (R5 - Imperial Park Industrial Estate, R9 - Swaines Industrial Estate)

7.22 This is an ‘urban’ cluster which accommodates two small existing employment sites with active B class employment uses. There is also a potential employment site referred to as R14 - Eldon Way. Whilst this site has some existing employment activity, it is categorised as a potential employment site as it has been re-allocated for mixed use including residential and employment uses.R14 is therefore assessed in more detail in section 8.

7.23 The two active sites both accommodate mixed stock quality and are of average overall quality as employment sites, for the local scale B1 and B2 activities evident on these sites. Both sites are considered fit for purpose, supporting locally focused activities and services within the Rochford District economy that require smaller scale employment sites and premises, and should be protected for continued employment use. Imperial Park Industrial Estate would benefit from enhancements to improve the stock quality and address vacancy on site.

7.24 Also within this cluster is Rawreth Industrial Estate, an active employment site which was de-allocated from employment to residential use in the Council’s 2014 Allocations Plan. It remains in active B class employment use (a mix of B1c and B2) with locally focussed businesses and is yet to come forward for any form of residential development. This site is considered to be of average overall quality.

7.25 Despite there being an allocated potential site to accommodate existing business occupiers from the de-allocated Rawreth Industrial Estate site (R12 – land west of A1245), this re-location is yet to be required. Considering that the Rawreth Industrial Estate site continues to function adequately as an employment site, and there has as yet been no residential development interest in the site, the Council could consider re-allocating the site for employment use to support its existing activity. However, this should be considered in combination with the findings of the Councils’ latest SHELAA.

London Southend Airport Cluster (R1 - Aviation Way Industrial Estate, R8 - Rochford Business Park)

7.26 The London Southend Airport Cluster includes two of the larger scale employment sites within the district; Aviation Way Industrial Estate and

Rochford Business Park. Both sites contain modern good quality stock, accommodating a mix of B1/B2 uses, with Aviation Way home to airport related national and international manufacturing activity alongside smaller scale local business activity. This site should be protected and maintained, supporting the expansion of activity into the neighbouring allocated site (R15 – land north of Southend Airport) where appropriate.

7.27 Whilst Rochford Business Park site accommodates new, good quality stock (with development activity continuing to build out remaining un-occupied plots) all current occupiers are for non B-class activities (car related showrooms etc.), which has been reinforced by further new car-related activities since the Rochford District Employment Land Study Update in 2014. It is recommended that the site is retained within the emerging EDNA because of the remaining capacity to accommodate B class activity but this is becoming limited. This site could be formalised for non B class employment activity, particularly as there is the nearby R15 allocated site for employment which could accommodate a significant amount of B class employment activity within this cluster.

7.28 In combination with the cluster of London Southend Airport related employment activity within the borough of Southend-on-Sea, this cluster is strategically important for South Essex, particularly for the continued strength and growth opportunities in the advanced aviation manufacturing sector.

8. Future Supply Portfolio

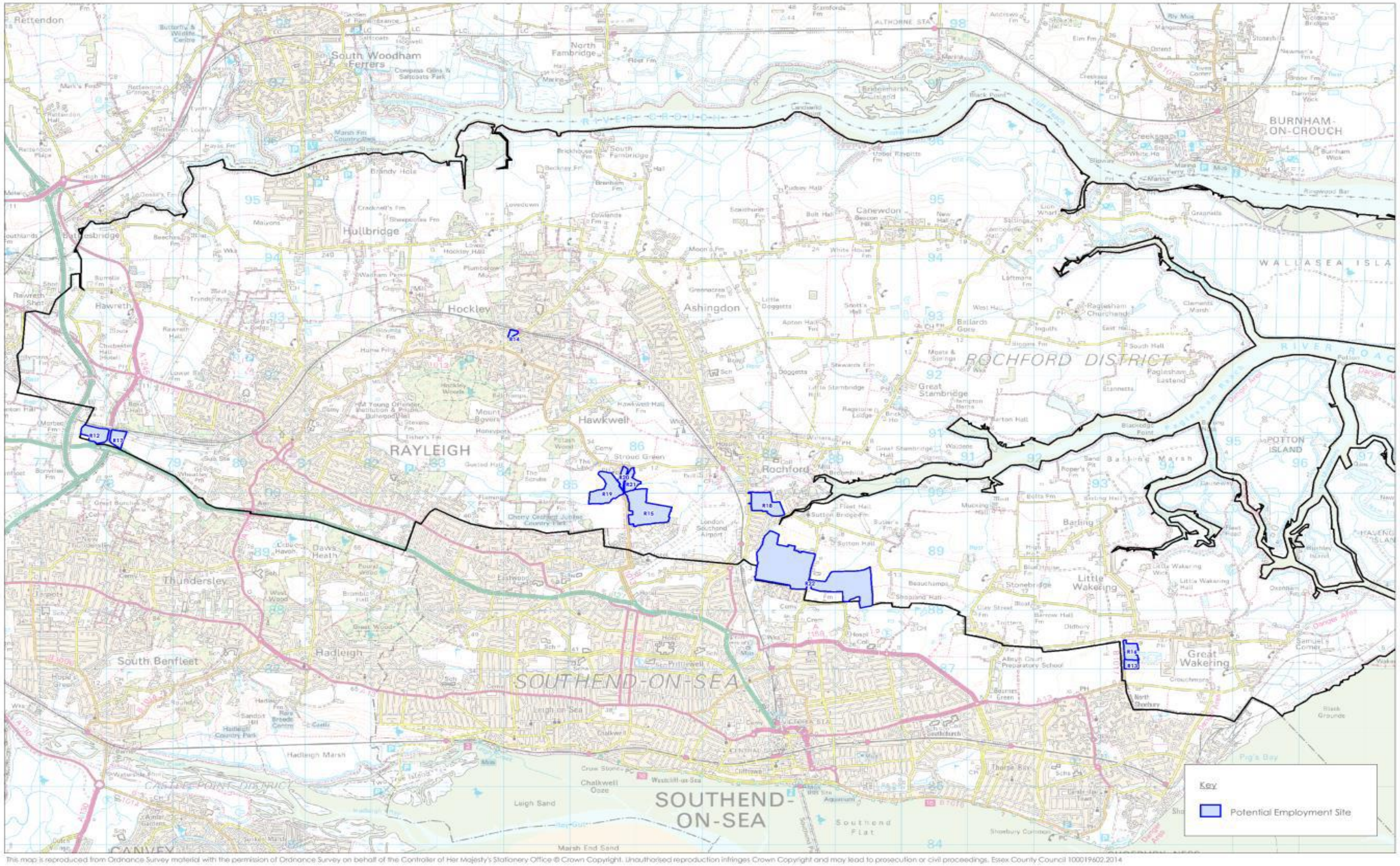
8.1 This section identifies the key sources of potential future employment land supply across Rochford District. Each site has been assessed to understand its potential contribution as future employment land, the type of employment use it is most suitable to accommodate, and the likelihood of this coming forward in the short, medium and long term.

Potential Future Employment Sites in Rochford District

8.2 The figure below highlights the location of potential future employment sites within Rochford District. The two categories of potential employment sites considered in the distirct are:

- Allocated employment sites (as identified in the Rochford District Employment Land Study Update 2014)
- Sites identified through the Council's Call for Sites process

Figure 6: Potential Employment Sites in Rochford District



Source: emerging South Essex EDNA, GVA, 2017

8.3 Within Rochford District, potential sites have been assessed by considering their location context, connectivity to the strategic road network, public transport links, access to retail/leisure facilities and amenities, existing policy allocations / guidance, and any other relevant factors. This information is used to inform the indication of suitability of the B class uses that would be most appropriate on the sites. This does not mean the sites are only suitable for these types of B class activity, or that such a use is guaranteed to come forward. This assessment is intended to provide a guide for suitability that can be used to balance use class specific supply with the actual demand of employment land. Potential sites within the district take one of two forms. They are either already allocated employment sites or have been identified through the Call for Sites process. It should be noted that any potential employment sites that have been identified must be read in conjunction with the Council's SHELAA.

8.4 The possible timescales for employment delivery is also indicated for each potential employment site. This is not an exact delivery projection, or confirmation that the site could definitely come forward in that timescale or at all, but it gives a guide to delivery timeframe based on the suitability and readiness of sites for employment uses. The 'short' timescale represents a 0-5 year time period, the 'medium' timescale represents a 5-10 year time period, and the 'long' timescale represents a 10+ year time period. This timescale indication takes into account any complexities such as remediation requirements or hard infrastructure on site which would slow the development process. The results of this assessment are reproduced in full as Appendix B and summarised below.

Table 2: Potential Employment Land Totals within Rochford District

Cluster	Allocated Employment (ha)	Call for Sites (ha)	Total (ha)
London Southend Airport	27.1	24.2	51.2
Purdey's	0	105.7	105.7
Great Wakering	3.2	0	3.2
Wallasea Island	0	0	0
Southend Arterial Road	8.8	5.3	14.1
Rayleigh, Hockley &	1.2	0	1.2

Cluster	Allocated Employment (ha)	Call for Sites (ha)	Total (ha)
Ashingdon			
Rochford Sites Total	40.24	135.2	175.4

Source emerging South Essex EDNA, GVA, 2017

8.5 Including all potential employment land sites, which have been allocated in the 2014 Allocations Plan or identified through the Call for Sites process, there is 175.4ha of land identified for potential future employment uses. The majority of potential employment land sites are located within the Purdey's cluster. This is primarily as a result of Site R22 – land east and west of Sutton Road, a greenfield site which came forward as part of the Call for Sites process and which totals 92.07ha. Of the total potential future employment sites, 40ha is currently allocated, 27ha of which is located in the London Southend Airport cluster.

8.6 Considering the Rayleigh, Hockley and Ashingdon cluster, Star Lane (R16) and Rawreth Industrial Estate (R23) are not included as potential employment sites, despite not having fully come forward for residential development since their re-allocation to residential from employment, because the residential allocation currently remains in place.

Table 3: Potential Employment Land Totals by Suitability for B Class Uses in Rochford District

Use Class	Total Potential Sites Area (ha)	Proportion of Total
B1	1.24	1%
B1/B2	27.07	15%
B1c/B2	3.15	2%
B2/B8	138.66	79%
B1/B2/B8	5.31	3%
Total	175.4	100%

Source: emerging South Essex EDNA, GVA, 2017

8.7 The portfolio of potential employment sites provides the opportunity to accommodate a range of B1, B2 and B8 employment uses, with the largest proportion (79%) most suitable for B2 and B8 uses. This predominance of B2/B8 uses reflects the existing typology within Rochford District, with its large proportion of industrial B-class land use. All of the potential employment sites in Rochford District are considered suitable for some form of B-class use, and whilst there are no specific allocations for solely office use, this could be accommodated within the B1/B2 site mix. However, considering the limited scale of potential sites suitable for office uses compared to other B class employment uses, particular focus should be placed on the supporting office and flexible workspace development on sites where appropriate to meet demand.

8.8 The scale of land identified for potential future employment use in Rochford District, which could accommodate a mix of B1c, B2 and B8 uses, could foster an ambition to significantly increase B-class employment provision within the local authority above its current level.

8.9 It is important to note that there are several factors which influence the likelihood and timescales for potential sites being successful in delivering employment opportunities:

- Large brownfield sites can require significant site remediation which could affect the viability of delivering any form of employment activity on site.
- Some brownfield sites accommodate existing power and utilities infrastructure, or infrastructure and built development supporting the functionality of neighbouring sites, or may be required to accommodate these types of provision in the future, which could constrain the employment development potential on these sites.
- A number of potential sites provide large scale opportunities which would naturally support certain types of storage and distribution (B8) activities, and may be particularly appropriate for port-related activity. This means that whilst other small industrial, SME and office business activities could be accommodated on parcels of these sites, taking advantage of their urban context and connectivity, this type of development on these sites is less likely to be brought forward by the market without significant public sector intervention. This is also true for potential sites with a particularly rural context which have poor connections to the urban area, amenities and public transport connectivity.

8.10 This emphasises the importance of understanding the balance of land required to accommodate future employment growth on both a quantitative and qualitative basis, in order to ensure the right type of employment locations and facilities can be provided for the range of employment activity expected in Rochford District. This is explored in the next section.

9. Employment Growth Scenarios

9.1 There are two key components to the forecasting approach that result in a single projection of employment land need within Rochford District. These are:

- A forecast of land and floorspace required to accommodate new demand, based on projections of employment growth;
- An allowance made for supply side factors to ensure sufficient space is available throughout the plan period to accommodate existing and new businesses.

9.2 The approach to estimating new demand identifies a base economic forecast, develops a number of scenarios testing the range of growth possibilities for Rochford District, and then develops a 'combined scenario' which provide a synthesis bringing together the reasonable growth expectations for the district.

9.3 The range of scenarios developed build upon an understanding of past economic performance, the strengths and weaknesses of the local economy, factors expected to influence future growth, and the wider macro-economic context for key economic sectors.

Rochford District Economic Growth Drivers

9.4 To understand the range and portfolio of future employment land and floorspace needed, it is important to understand the potential nature of employment growth within Rochford District. This facilitates the quantitative assessment of the alignment between employment land supply and the range of projected future demand. Based on the socio-economic analysis undertaken through the emerging EDNA at the South Essex and local authority level, a number of key Rochford District economic strengths have been identified. These are those considered to be of high value and most pivotal to future economic growth opportunities in the district. It should be noted that the sectors listed below are those with are considered to be key economic drivers. It is, for example, recognised that Rochford District is comparatively strong in the construction sector within South Essex but this is not considered to be a sufficiently strategic sector across the sub-region.

Transport and Logistics

9.5 This activity has a strong sector presence in South Essex, with the core cluster of activity evident in Thurrock. Basildon has some strength in this activity, and Rochford District has been seeing an increasing role in recent years, but not at the scale at which Thurrock accommodates this activity related to the authority's key ports; Tilbury, Purfleet and London Gateway.

9.6 The strength of this type of activity is expected to be further increased, particularly in Thurrock, driven by its proximity to London and other key exporting centres, its road infrastructure connectivity, current and future investment into the infrastructure required to support this sector (such as at London Gateway), and the comparatively affordable rents offered for this type of activity in Thurrock compared with existing London locations (such as Barking & Dagenham).

Manufacturing and Engineering

9.7 The manufacturing and engineering sector has a strong presence across South Essex, with defined strengths around the manufacturing of fabricated materials and architectural and engineering activities. This sector strength is evident in Thurrock, however the core sector cluster is found in Basildon, supported by large anchor businesses such as Ford.

9.8 Potential exists in Southend and Rochford District to strengthen advanced manufacturing and engineering in association with the London Southend Airport and the new Airport Business Park in Rochford. Aviation related businesses are already located in the area and the JAAP proposes capacity for approximately 5,000 additional jobs which should consider how the existing local network can be best utilised. A key focus for the Councils in attracting this type of growth should be in providing support and training for local employees to take up opportunities in this sector.

Energy and Green Technology (links with manufacturing and engineering)

9.9 Thurrock attracts the majority of this sector-specific activity within the South Essex sub-region on the basis of the number employed although Rochford District also shows strength in this sector at the smaller scale. For the district, the potential lies within providing support to existing activities and their expansion. There has been a falling trend in the employment level in South Essex in this sector so it is not expected to be the strongest sector specific growth opportunity.

Base Employment Forecast Model

9.10 The East England Forecasting Model (EEFM) forms the baseline for the economic growth scenarios. The model delineates growth into major sectors, which in turn are aggregated into land use types. This approach provides a land and floorspace requirement for office (B1a / b), manufacturing / industrial (B1c / B2) and warehousing (B8) activity. Whilst this approach aligns with the guidance provided by the NPPF and PPG and provides a robust basis for planning purposes, it must be recognised as a forecast rather than a prediction. Using employment density assumptions the job creation forecasts are translated into additional floorspace requirements. More detail with regard to the forecasting model will be available in the emerging EDNA.

Employment Growth Scenarios

9.11 The employment growth scenarios seek to understand a number of ‘reasonable alternatives’ for potential future employment growth across South Essex. Those relevant to Rochford District are summarised below:

London Industrial Land Re-location

9.12 London is seeking to release significant industrial land in the North Thames Gateway and London policy evidence suggests that the displaced uses from land in this area (particularly from Barking & Dagenham, Havering and Newham boroughs) will move to neighbouring property market areas. The potential impact tested through these scenarios largely reflects the authorities’ proximity to the North Thames Gateway area and the existing nature of their economy, both of which reflect their suitability to accommodate displaced activities. Whilst other parts of South Essex are forecasted to receive higher proportions of these displaced uses than Rochford District, the re-location of businesses from London will still impact on the baseline forecast for the district. The methodology employed to work out how displaced industrial uses from London will impact on baseline economic projections is explained in more detail within the emerging EDNA report.

London Southend Airport Impact

9.13 Previous assessment of the London Southend Airport Impact undertaken in the Rochford District Council’s 2014 Employment Land Study Update suggests 400 additional jobs in Rochford District as a result of the airport (in addition to the 4,700 jobs assumed in the adopted JAAP for the London Southend Airport area). These additional jobs constitute the supply chain and related service jobs expected to be created at the new Airport Business Park in Rochford. This equates to an approximate 30% uplift in B class employment and 1.4% employment growth per annum.

Base Employment Forecast for Rochford District

9.14 The baseline forecast employment growth would see 1,292 new FTE jobs created within Rochford District over the period 2016 - 2036, an increase of 5%.

9.15 This baseline forecast includes job creation of 156 B class specific FTE jobs. Within ‘B class’ activities the base forecast shows an increase in office based employment activities (9% or 523 jobs). However this is counteracted by a projected reduction in manufacturing / light industrial jobs (-6% or -346 jobs) and in warehousing jobs (-2% or -21 jobs). Without making any allowances for windfall losses or churn, or the growth scenarios detailed above, the base forecast estimates the following additional demand for floorspace and land from 2016 – 2036:

Table 4: Rochford District Base Forecast Employment Floorspace & Land Requirement (2016 - 2036)

Floorspace Type	Floorspace Demand 2016 - 2036 (m^2)	Change in Land 2016 - 2036
Office	6,271	1
Manufacturing / Industrial	-12,442	-3
Warehouse	-1,481	0
Total	-7,652	-3

Source: East of England Forecasting Model, GVA, 2016

Note: All figures represent number of FTE jobs and are considered ‘minimums’ based on economic projections, and have been rounded.

London Industrial Land Re-location Scenario

9.16 It could reasonably be expected that Rochford District can only accommodate a limited amount of the smaller scale displaced light industrial and distribution activity, compared to that which could be accommodated by other parts of South Essex. Reflecting this, Rochford District’s London Industrial land Re-location scenario captures 10% of the total displaced activity, a split of 50% industrial activity and 50% distribution activity. This results in the following floorspace requirements.

Table 5: Rochford District's Industrial Land Re-location Land Requirement Forecast (2016 - 2036)

	Growth Scenario Floorspace Demand 2016-2036 (m^2)	Change in Land (Ha)	Employment Creation
Office	6,271	1	523
Manufacturing / Industrial	46,325	12	1,287
Warehouse	46,325	12	662
Total	98,921	24	2,471

Source: East of England Forecasting Model, GVA, 2016

9.17 The projected impact of industrial land re-location is the increase in the floorspace requirement for manufacturing / industrial activity and warehouse activity. This translates into an increased manufacturing / industrial land requirement of 46,325sqm and an increased warehouse floorspace requirement of the same scale, equating to a land take of 12ha. There is no projected change in the floorspace or land requirement for office activity under this scenario compared to the base forecast.

London Southend Airport Impact Scenario

9.18 Building on the previous assessment of the London Southend Airport Impact undertaken in the Rochford District Council Employment Land Study Update 2014, a 1.4% per annum growth rate is used as the employment multiplier, which is split equally between use classes, resulting in 0.7% office growth and 0.8% industrial growth.

Table 6: Rochford District's London Southend Airport Impact Land Requirement Forecast (2016 - 2036)

	Growth Scenario Floorspace Demand 2016-2036 (m^2)	Change in Land (Ha)	Employment Creation
Office	6,791	1	566
Manufacturing / Industrial	-11,033	-3	-306

	Growth Scenario Floorspace Demand 2016-2036 (m^2)	Change in Land (Ha)	Employment Creation
Warehouse	-1,481	0	-21
Total	-5,724	-2	238

Source: East of England Forecasting Model, GVA, 2016

9.19 The projected impact of the indirect jobs created by London Southend Airport on the base line forecast is a slightly greater requirement for office and manufacturing / industrial floorspace although the latter remains a negative floorspace requirement.

Rochford District Combined Scenario

9.20 The Combined Scenario reflects a more realistic expectation of manufacturing / industrial growth with regard to industrial land re-location and the indirect jobs created as a result of London Southend Airport. The EDNA provides further detail with regard to methodological nuances.

Table 7: Summary of Rochford District Employment Growth Forecasts in Floorspace and Land Requirements (2016 - 2036)

Floorspace (m_2)	Total	Office	Manufacturing / Industrial	Warehouse
Baseline	-7,652	6,271	-12,442	-1,481
Industrial Land Re-location	98,921	6,271	46,325	46,325
London Southend Airport Impact	-5,724	6,791	-11,033	-1,481
Combined Forecast	30,306	6,837	24,950	-1,481

Source: East of England Forecasting Model, GVA, 2016

Table 8: Rochford District Combined Scenario Land Requirement Forecast (2016 - 2036)

	Floorspace Demand 2016-2036 (m^2)	Change in Land (ha)	Employment Creation
Office	6,837	1	570
Manufacturing / Industrial	24,950	6	693
Warehouse	-1,481	0	-21
Total	30,306	7	1,242

Source: East of England Forecasting Model, GVA, 2016

9.21 As shown in the comparison table for all scenarios (Table 7), this combined scenario sees the same overall office land requirement as the baseline forecast. The manufacturing / industrial floorspace requirement under the combined scenario is significantly larger than the requirement in the base forecast and the London Southend Airport Impact scenario, however it is significantly smaller than the requirement in the London Industrial Land Re-location scenario. This is reflected in the land requirement figure.

9.22 The Combined Forecast provides an overall requirement for 7ha of land, driven primarily by the opportunities in the district to accommodate new production based activity, in part driven by the Airport. This broadly aligns with the previous assessments, which suggested a requirement for up to 8.8ha of land, based on the previous EEFM 'High Migration' scenario, which incorporated a higher level of labour force led employment growth than the current model outputs.

9.23 This 7ha land requirement equates to total employment creation of 1,242 jobs over the projection period (2016-2036), which equates to job creation of approximately 62 jobs per annum.

Potential Supply Side Adjustments

9.24 In order for future employment forecasts to be based on more than economic growth 'predictions' and to better reflect the fluid nature of land allocations, there is the potential need to make some 'supply side' adjustments. These take two forms, 'windfall' and 'churn'. These approaches have limitations and it may be wished to discount the need for the allowance to be made in future policy.

Contingency Allowance for 'Windfall Losses'

9.25 This takes into account the fact that a proportion of designated employment land will not be entirely used by B-Use-Class employment. Examples include waste management, healthcare, education, hotels and leisure. Further, with the extension of Permitted Development Rights making the conversion of office premises to residential use more straightforward, there is the potential for an increase in the unexpected loss of employment floorspace. Estimates based on historic net losses of employment land to other uses such as housing and leisure as reported in the Council's Authority Monitoring Report have been used to calculate a 'windfall loss' figure.

Table 9: Allowance for Windfall Losses

	Office (m^2)	Industrial (m^2)	Warehouse (m^2)
Rochford (2010-2016)	12,607	26,983	3,120

Source: GVA Analysis of Local Authority Monitoring Reports

9.26 Shifts in permitted development rights and the inability to refurbish these properties viably to meet modern occupier requirements has seen a large quantum of space converted from office to residential. Although this has been more keenly felt in other districts in South Essex than Rochford District, it is still an important consideration. Across South Essex, it has been assessed that given the nature of the stock lost it is unlikely that its loss has placed a major constraint on the economic capacity of South Essex as space was unlikely to be reoccupied. As such it is unlikely that the full amount of floorspace would need to be replaced through future land allocations.

9.27 The losses of industrial space can be as a result of numerous drivers. In some locations across South Essex, the lost capacity has been a result of occupiers vacating, allowing total redevelopment for non-B class uses. This has resulted in the wholesale loss of industrial estates in some of the local authority areas. However, in many cases the losses have been more piecemeal, with individual units being lost to non-industrial activity, in many cases leisure uses, as this sector has grown across the UK.

9.28 In terms of future planning, the losses that have occurred by occupation of premises by non-B class activity are likely to have placed some limitations on the capacity of South Essex to accommodate B class activity. As such making a future allowance to offset this limitation could be necessary to correct historic losses.

Contingency Allowance for 'Churn'

9.29 Churn allows for the fact that locational and premises needs of businesses change over time. This requires businesses to move. In other instances an existing business might cease its operations and a new business take over a site for redevelopment. For this to happen smoothly there is a need for certain level of available vacant land. This type of demand has been called 'churn'. An allowance for 'churn' is calculated from the average annual construction rate of space within the District as recorded within the Authority Monitoring Report.

Table 10: Allowance for Churn

	Office (m^2)	Industrial (m^2)	Warehouse (m^2)
Rochford District (2010-2016)	0	238	52

Source: GVA Analysis of Local Authority Monitoring Reports

9.30 This allowance for churn allows the commercial property market realities to be added to the baseline economic forecast, reflecting historic demand and development rates. As can be seen, the allowance for churn is significantly lower than potential adjustments made for historic losses, however there is still evidence of an ongoing demand for industrial and warehouse property across the area.

Combined Land Requirements

9.31 Accommodating the windfall (Table 9) and churn (Table 10) contingencies within the combined scenario detailed in Source: East of England Forecasting Model, GVA, 2016

9.32 Table 8 allows an identification of the total projected employment land requirement across Rochford District required to provide sufficient capacity to accommodate future business needs.

Table 11: Combined Requirement for Land and Floorspace across Rochford District incorporating Windfall and Churn

	Total	Office	Manufacturing	Warehouse

			& Industrial	
Floorspace (m^2)	73,306	19,443	52,172	1,691
Land (ha)	16	2	14	0

Source: emerging South Essex EDNA, GVA, 2017

9.33 The total employment land supply derived from existing allocations, and that which came forward through the Call for Sites exercise, as presented in Table 2, is compared to the demand scenarios detailed within Source: East of England Forecasting Model, GVA, 2016

9.34 Table 8 and Table 11 below.

Table 12: Requirement for Economic Land in Rochford District

Total Employment Land Supply (Allocations and Call for Sites) (ha)	Total Employment Land Demand (ha) : Combined Scenario	Total Employment Land Demand (ha) : Combined Scenario with supply side adjustment	Employment Land Demand as % of Supply
175.4	7	16	1% or 2%

Source: emerging South Essex EDNA, GVA, 2017

9.35 The majority of the additional capacity requirement through windfall and churn allowances is driven by the need to offset historic losses of industrial and office premises which may not be necessary if much of the stock was redundant prior to demolition/conversion.

10. Conclusions and Recommendations

10.1 The emerging EDNA is not an Employment Land Study. As an economic development needs study its focus is on understanding the needs of the South Essex economy and how these are contributed to by the local economies of each authority area, including Rochford District.

Balancing Demand and Supply

In quantitative terms the total Rochford District employment land portfolio (specifically the potential employment sites (specifically the potential employment sites which constitute provision that is not currently utilised) in theory would not currently utilised) in theory would more than adequately provide for the projected future total employment land projected future total employment land demand across the sub-region, as shown above in

shown above in

10.2 Table 12. These potential employment sites include those which are allocated but have yet to be developed and those which have come forward through the Call for Sites processes.

10.3 The EDNA concludes that Rochford District may wish to plan on the basis of not requiring the inclusion of the full allowance of 16ha, and instead plan on the basis of economic growth projections and an additional allowance for 'churn' – reflecting the fact most stock has been lost as it was (in effect) redundant. However, much of the loss here has been of space that could (in theory) have been reused for B class activity.

10.4 The potential employment site portfolio comfortably provides the total quantum of employment land supply required to meet forecast demand to 2036, without needing to deliver on all potential employment sites. As shown in Table 12, this is true whether allowances for churn and windfall are incorporated into projections or not. However, the balance of land to be bought forward must be considered in light of the forecasted requirement for office, industrial and warehouse development and the sites identified to be most suitable for each. Whilst there is not direct comparison between all categories, due to some potential sites being identified as suitable for a mix of different B class uses (see Table 3), this helps to understand how well the available land portfolio for Rochford District in total could accommodate the growth of employment activities in the future.

10.5 Office floorspace will be the most challenging demand to accommodate. Rochford District must ensure that future office development is focussed towards sites which meet its occupier requirements, which may not always be possible as part of mixed site portfolios, so this will have to be assessed on a site-by-site basis and monitored carefully over the projection period.

10.6 The challenge for supporting the economic growth of Rochford District is not restricted to the quantum of employment land available across the sub-region, it also includes the suitability of this land in meeting the demand from different growth sectors and employment activities. The growth sectors for which Rochford District demonstrates particular potential are summarised below.

Transport and Logistics Sector Growth

10.7 The proximity to London and South East markets is related to the requirement for good connectivity, but also refers specifically to the geographic distance from London and the London facing nature of a location. The unique characteristic in the South Essex context, which relates specifically to the Thurrock clusters identified, is the role of the ports (Purfleet, Tilbury, London Gateway and Baltic Wharf in Rochford District) in supporting and attracting transport and logistics activity for the South Essex sub region.

10.8 Whilst there is a complicated relationship between port activity and its direct and indirect relationships in supporting general industrial and transport and logistics activity, there is an undoubted economic advantage which the ports create, which is particularly beneficial for the Purfleet, Lakeside Basin, Tilbury, London Gateway clusters and businesses located around Baltic Wharf.

10.9 Baltic Distribution Ltd. at Baltic Wharf is of a much smaller scale than the ports located in Thurrock, which accommodates importation and onwards distribution of timber and steel products. Whilst it does not perform the same strategic level function as the Thurrock ports, support should be provided for the continuation and growth of its operations. The weaker strategic road network connections of the Baltic Wharf port related activities means it does not meet the requirements for strategic contribution to growth of South Essex's transport and logistics sector, but can continue to perform a smaller scale more localised role, underpinning transport and logistics sector activity within Rochford District.

Advanced Manufacturing & Green Technology Sector Growth

10.10 Both of these sectors have certain location requirements which are similar to the transport & logistics sector. This includes good connectivity to the strategic road network, which is via the A127 for the London Southend Airport JAAP cluster. Availability of potential employment sites within the cluster which could accommodate the often large scale activity associated with the advanced manufacturing and to a lesser extent the green technology sector, is another similar requirement.

10.11 Proximity and accessibility to the London and South East markets and supply chains is another similar requirement for advanced manufacturing and green technology sector activity. However, despite the comparable weakness in proximity for the London Southend Airport JAAP cluster, this is counteracted by its strengths in meeting other locational requirements of these sectors, such as its extreme proximity to the airport. Here, aviation related advanced manufacturing activity in particular can be fostered. Having accessibility to draw locally on a highly skilled workforce is a key requirement which is facilitated by the proximity to local town centres and transport connections.

Town Centre Opportunities

10.12 The key town centres across South Essex (to varying degrees and for varying scales of activity) have the potential to provide growth opportunities for the digital, cultural and creative industries sector, considering the requirements for high quality mixed use environments which provide access to a good range of facilities and amenities, and good transport connectivity for employees. A level of professional and business sector growth in particular could be expected to locate in these town centre environments considering their strong link with population clusters, and the level of service, amenities and facilities they provide in one location.

Recommendations

10.13 The emerging EDNA presents the following key recommendations with regard to achieving balanced economic growth and efficient and appropriate allocation, protection / release and development of employment land:

- Improving local skills levels and improving economic prospects;
- Increasing productivity levels and GVA growth;
- Promoting the culture of entrepreneurship;
- Supporting and promoting key economic growth sectors;
- Maintaining a flexible and responsive employment land portfolio;
- Elevating the role and position of key town centres;
- Maximising strong transport connections and making the case for transport investment;
- Prioritising required amenities and infrastructure to support growth; and
- Strengthen the sub-region’s connections and relationship with London

10.14 These will be expanded upon in more detail within the emerging EDNA report. With regard to Rochford District specifically, it is noted that due to its close proximity to London, it has the potential to accommodate businesses re-locating out of the capital.

Appendix A – Existing Employment Sites in Rochford District

Table 13: Existing Employment Sites in Rochford District

GVA Site Ref	Council Site Ref	Site	Site Cluster	Site Area	Predominant Stock Quality	Overall Site Quality	Future Advice
R1	E1	Aviation Way Industrial Estate	London Southend Airport Cluster	25.27			Protect & Maintain / Enhance Support continued aviation related activity and B class development for the neighbouring potential site (R15)
R2	E2	Baltic Wharf	Wallasea Island Cluster	16.11			Protect & Maintain Appropriate for the port-related activities they accommodate
R3	E3	Essex Marina	Wallasea Island Cluster	4.03			
R4	E4	Brook Road Industrial Estate	Southend Arterial Road Cluster	13.15			Protect & Maintain / Enhance Support role for advanced manufacturing / engineering, but provide investment to improve quality (stock, highways etc.) and avoid non B class activity increase

GVA Site Ref	Council Site Ref	Site	Site Cluster	Site Area	Predominant Stock Quality	Overall Site Quality	Future Advice
R5	E5	Imperial Park Industrial Estate	Rayleigh, Hockley & Ashingdon	2.35			Protect & Enhance Support continued activity and provide investment to improve quality and address vacancy
R6	E6	Locks Hill, Rochford	Purdey's Cluster	0.82			Protect & Maintain Site functions well. Could support enhancement of gateway building
R7	E7	Riverside Industrial Estate	Purdey's Cluster	0.34			Protect & Maintain Functions well in supporting local employment activity, however this site is susceptible to flooding, which should be monitored to ensure this does not become a problem that impacts its ability to adequately accommodate employment activity.
R8	E8	Rochford Business	London Southend	11.63			Monitor & Manage

GVA Site Ref	Council Site Ref	Site	Site Cluster	Site Area	Predominant Stock Quality	Overall Site Quality	Future Advice
		Park	Airport Cluster				Non B-class development (car-related) has continued since previous study. Now limited capacity for new B class development. Consider formalising role of site as non-b class?
R9	E9	Swaines Industrial Estate	Rayleigh, Hockley & Ashingdon	0.46			Protect & Maintain Continue to support locally servicing role of site
R10	E10	Purdey's Industrial Estate	Purdey's Cluster	37.38			Monitor & Manage / Enhance Protect site for B class use, monitor the encroachment of non-B class activity and i support refurbishment and the delivery of new units where appropriate
Site de-allocated from employment to residential		Star Lane, Great Wakering	Great Wakering Cluster	5.82			Site was allocated for residential use, but functions as well occupied employment site with no residential development coming forward.

GVA Site Ref	Council Site Ref	Site	Site Cluster	Site Area	Predominant Stock Quality	Overall Site Quality	Future Advice
							Could consider re-allocating for employment use to support existing activity.
Site de-allocated from employment to residential		Rawreth Industrial Estate	Rural Cluster: Rayleigh, Hockley & Ashingdon	6.2			Site was allocated for residential use, but functions as well occupied employment site with no residential development coming forward. Could consider re-allocating for employment use to support existing activity.

Source: emerging South Essex EDNA, GVA, 2017

Appendix B – Potential Employment Sites in Rochford District

Table 14: Potential Employment Sites in Rochford District

Site Ref.	Site Name	Cluster	Area	Current Status	Site Description	Suitable employment use	Possible timescales
R12	Land West of A1245, Rayleigh (Michelins Farm)	Southend Arterial Road Cluster	8.78	Allocated	Greenfield site that is accessed from the A1245 off the A127. The site borders an employment site to the south and contains some informal/storage uses. The site falls within an employment allocation as per the 2014 Allocations Plan. The site could accommodate expansion of the neighbouring site and/or industrial uses due to proximate A1245/A127 junction and connection to strategic road network.	B2/B8	Short
R13	Land South of Great Wakering	Great Wakering Cluster	3.15	Allocated	Greenfield site located on the B1017, to the south of an existing employment site that appears to have undergone some clearing. The site falls within a new employment site allocation, as per the 2014 allocations plan, and could reasonably accommodate uses similar to those to the north of the site. The site access may require improvement to allow for such uses.	B1c/B2	Short
R14	Eldon Way, Hockley	Rural Cluster: Rayleigh,	1.24	Allocated	Site located near Hockley railway station including Foundry Business Park - currently occupied by dated B1c and B2 uses but	B1	Medium

Site Ref.	Site Name	Cluster	Area	Current Status	Site Description	Suitable employment use	Possible timescales
		Hockley & Ashingdon			with substantial trade counter and leisure creep which is why the site is not included within the existing site assessment. Set within the centre of Hockley, the site is proposed for redevelopment in the Hockley AAP with a focus on B1and B2 uses as part of wider mixed use redevelopment.		
R15	Land North of Southend Airport	London Southend Airport	27.07	Allocated / Outline Permission	Greenfield site with some recreational/sports use located to the north of the Aviation Way Industrial Estate. Site allocated as per the 2014 Allocations Plan. With existing site access from the south, the site forms one of the key growth locations in Rochford District as part of the JAAP. The site will accommodate the new Airport Business Park, with a mix of B1 and B2 uses.	B1/B2	Short / Medium
R17	Fairlawns Farm, Arterial Road, Rayleigh	Southend Arterial Road Cluster	5.31	Call for Site	Greenfield site with some agricultural storage use located to the northeast of the A127/A1245 junction. The site is bound by road to the west and south, railway to the north and greenfield/agricultural land to the east. The site does not fall within a site allocation but neighbours a new employment allocation which the adjacent	B1/B2/B8	Short/Medium

Site Ref.	Site Name	Cluster	Area	Current Status	Site Description	Suitable employment use	Possible timescales
					R12 allocated site falls within. Reflecting guidance for the R12 allocated site, the R17 Fairlawns Farm site could accommodate industrial uses, utilising the proximate A127/A1245 junction.		
R18	Three Ashes, land to the south of Tinkers Lane	Purdey's Cluster	13.63	Call for Site	Greenfield site that lies to the west of Purdey's Industrial Estate with agricultural use accesses from the south on Sutton Road and the northwest on Southend Road. The site also borders residential uses to the west and south. The site is located on green belt and B-class development that is sensitive to its surroundings is likely to be permitted. Uses on the site will likely reflect those on the neighbouring employment site and accesses will require improving to accommodate such uses.	B2/B8	Currently being delivered
R19	Land west of Cherry Orchard Way and south of Cherry Orchard Lane	London Southend Airport Cluster	15.79	Call for Site	Greenfield site which lies to the southwest of the Hall Road/B1013 roundabout with existing access from the north. The site borders road to the north and west, agricultural land to the south, a plant nursery to the east and residential use to the north east. The site does not fall within an existing allocation but borders a new allocation as per the Rochford District	B2/B8	Short

Site Ref.	Site Name	Cluster	Area	Current Status	Site Description	Suitable employment use	Possible timescales
					Proposals Map. The site could reasonably accommodate uses similar to those Aviation Way Industrial Estate located to the south, albeit with smaller scale uses in proximity to neighbouring residential.		
R20	Land west of Cherry Orchard Way and east of Cherry Orchard Lane	London Southend Airport Cluster	2.78	Call for Site	Greenfield site located to the west of the B1013 with site entrance from the Cherry Orchard Lane. The site borders the B1013 to the west, a plant nursery to the north west and agricultural land. The site does not fall within an existing allocation but borders a new allocation as per the Rochford District Proposals Map. The site could reasonably accommodate uses similar to those Aviation Way Industrial Estate located to the south.	B2/B8	Short
R21	Land east of Cherry Orchard Way	London Southend Airport Cluster	5.61	Call for Site	Greenfield site with some recreation use which lies to the southeast of the B1013/Hall Road roundabout. Some residential use lies to the south and northeast of the site but it is predominantly bound by agricultural land and the B1013. The site falls within a new employment allocation as per the Rochford District Proposals Map. The site would likely suit uses similar to those on Aviation Way	B2/B8	Short

Site Ref.	Site Name	Cluster	Area	Current Status	Site Description	Suitable employment use	Possible timescales
					Industrial Estate.		
R22	Land east and west of Sutton Road	Purdey's Cluster	92.07	Call for Site	Greenfield site that borders the Temple Farm employment site to the south which falls within the Southend Boundary. The site is predominantly bound by agricultural uses and some residential use to the north west. The site is not recorded in the 2014 Employment Land Study and does not fall within a land allocation and per the proposals map. However, given that the site neighbours an existing employment site and can make use of Fossetts Way access road, it could be considered for similar uses.	B2/B8	Short

Source: emerging South Essex EDNA, GVA, 2017

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