

# **Economic and Employment Evidence to Support the Local Plan and Economic Development Strategy**

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*Appendix 2: Evidence Base Review and Consultations*

**Prepared for Epping Forest District Council**

September 2015

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# 1 National Planning Policy

National Planning Policy is set out in two documents/sources:

- the National Planning Policy Framework, 2012<sup>1</sup>, hereafter referred to as NPPF
- Planning Practice Guidance<sup>2</sup>, which is a live website and continually updated

## 1.1 National Planning Policy Framework (NPPF) and Planning Practice Guidance (PPG)

### 1.1.1 National Planning Policy Guidance

NPPF sets out the Government's planning policies for England, and how these are expected to be applied at the local level. It has a clear emphasis on achieving *sustainable development*. NPPF is a material consideration in any planning decision.

NPPF sets out three dimensions to sustainable development, which need to be delivered in balance because they are mutually dependent: the economic role, the social role and the environmental role. The economic role of the planning system (para. 7) is:

*contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure*

The NPPF establishes a *presumption in favour of sustainable development* (para. 14). For plan making this means that:

*local planning authorities should positively seek opportunities to meet the development needs of their area*

At paragraph 152 on plan making, the NPPF states that:

*Local planning authorities should seek opportunities to achieve each of the economic, social and environmental dimensions of sustainable development, and net gains across all three.*

Neighbourhood plans (para. 16) should:

*support the strategic development needs set out in Local Plans, including policies for housing and economic development*

### 1.1.2 Planning Practice Guidance

Planning Practice Guidance (PPG) sets out guidance on key elements of the NPPF. The most pertinent of these are discussed below.

<sup>1</sup> National Planning Policy Framework (March 2012) Department for Communities and Local Government

<sup>2</sup> <http://planningguidance.planningportal.gov.uk/blog/guidance/>

## 1.2 Core planning principles

Twelve core planning principles are set out in the NPPF (para. 17). These include the principles that planning should:

*proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities*

*take account of the different roles and character of different areas, promoting the vitality of our main urban areas, protecting the Green Belts around them, recognising the intrinsic character and beauty of the countryside and supporting thriving rural communities within it*

## 1.3 Economy

Section 1 of the NPPF sets out how it will help to build a **strong, competitive economy**. At paragraph 19, it states that:

*The Government is committed to ensuring that the planning system does everything it can to support sustainable economic growth. Planning should operate to encourage and not act as an impediment to sustainable growth. Therefore significant weight should be placed on the need to support economic growth through the planning system.*

At paragraph 21 the NPPF sets out a number of requirements of local plans that are of particular importance to this review. It states that local planning authorities should:

*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; and*

*facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.*

## 1.4 Town centres

Section 2 of the NPPF is about *ensuring the vitality of town centres*. At paragraph 23 the NPPF states that:

*Planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period.*

### 1.4.1 Ensuring the vitality of town centres in Planning Practice Guidance

According to paragraph 001:

*Local planning authorities should assess and plan to meet the needs of main town centre uses in full, in broadly the same way as for their housing and economic needs*

The local plan should include a positive vision or strategy for the town centres (para. 002).

## 1.5 Rural economy

Section 3 of the NPPF is about *supporting a prosperous rural economy*. It states that 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; and*

*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.*

## 1.6 Other elements

Other elements of the NPPF that are relevant to economic and employment issues include:

- section 4 on promoting sustainable transport
- section 5 on supporting high quality communications infrastructure – particularly telecommunications and broadband
- section 6 on delivering a wide choice of high quality homes

## 1.7 Green Belt

Section 9 discusses the protection of Green Belt land. At paragraph 84 it is stated that:

*When drawing up or reviewing Green Belt boundaries local planning authorities should take account of the need to promote sustainable patterns of development. They should consider the consequences for sustainable development of channeling development towards urban areas inside the Green Belt boundary, towards towns and villages inset within the Green Belt or towards locations beyond the outer Green Belt boundary.*

## 1.8 Evidence base

In the NPPF section on plan making, there is some discussion of the evidence base required for the plan making process. Any assessment of housing and employment should be integrated. The NPPF (para. 160) states that there should be a clear understanding of business needs and economic markets operating across the local area.

Local planning authorities should work with county and neighbouring authorities and LEAs to prepare and maintain a robust evidence base. They should also work closely with the business community to understand their needs, and barriers to investment.

At paragraph 161 the NPPF states that local planning authorities should use this evidence base to assess:

*the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;*

*the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;*

*the role and function of town centres and the relationship between them, including any trends in the performance of centres;*

*the capacity of existing centres to accommodate new town centre development;*

*locations of deprivation which may benefit from planned remedial action; and*

*the needs of the food production industry and any barriers to investment that planning can resolve.*

## 1.9 Duty to cooperate

Strategic priorities (including homes, jobs, retail, leisure, commercial development, infrastructure etc.) should be considered across administrative boundaries (para. 178), to the *mutual benefit of neighbouring authorities*. At paragraph 179, the NPPF states that:

*Joint working should enable local planning authorities to work together to meet development requirements which cannot wholly be met within their own areas*

In two-tier areas, county and district authorities should cooperate with each other on relevant issues (para. 180). Local planning authorities should work together with LEPs and other bodies.

### **1.9.1 Duty to cooperate in Planning Practice Guidance**

Local planning authorities should engage *constructively, actively and on an ongoing basis* (para. 001). It is not a duty to agree (para. 001, para. 003). There is no definitive list of actions that constitute effective cooperation (para. 011). The range of organisations that need to cooperate will be driven by functional geographies e.g. housing market areas and travel-to-work areas (para. 015).

## **1.10 Housing and economic development needs assessment**

In terms of economic needs analysis (para. 002), the objective of the assessment is to:

*identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development; and*

*provide a breakdown of that analysis in terms of quality and location, and to provide an indication of gaps in current land supply.*

In paragraph 030 it is suggested that:

*plan makers should liaise closely with the business community to understand their current and potential future requirements*

Other areas for consideration set out in paragraph 030 include:

- The recent pattern of employment land supply and loss to other uses
- Market intelligence (from local data and discussions with developers and property agents, recent surveys of business needs or engagement with business and economic forums)
- Market signals, such as levels and changes in rental values, and differentials between land values in different uses
- Public information on employment land and premises required
- Information held by other public sector bodies and utilities in relation to infrastructure constraints
- The existing stock of employment land
- The locational and premises requirements of particular types of business
- Identification of oversupply and evidence of market failure

Detailed guidance on the method for assessing the need for employment land is set out in paragraphs 031 to 034.

### **1.10.1 Housing and economic land availability assessment**

Detailed guidance is provided on the methodology for land availability assessment.

## 2 Functional Economic Market Area

### 2.1 Defining the Functional Economic Market Area

The duty to cooperate requires local planning authorities to work with other authorities with which it shares a functional geography. Two measures of functional geography that are typically (and relatively easily) measured are:

- housing market areas
- travel to work areas

Retail catchment areas are also helpful, although data is harder to access.

The Planning Practice Guidance (PPG) website states that there is no standard approach, but makes a suggestion on the factors that can be used in the definition of functional market areas. This is reviewed below.

PPG Suggestion	Comment
Extent of LEP	The full LEP boundary is not helpful in the case of Epping Forest District. West Essex (Epping Forest District, Harlow and Uttlesford) forms a local unit within Essex and the broader LEP geography and is more useful for defining a functional economic market area.
Travel to Work Areas	Latest TTWAs are based on 2001 Census data. The southern half of the District falls into the London TTWA, and the northern edge of the District falls in the Harlow & Bishop's Stortford TTWA. This does not help in this case.
Housing market area	See below
Flow of goods, services and information	No information easily available.
Service market for consumers	Major regional retail developments outside the District draw a lot of the comparison retail spend out of the District, across a broad area, so this is not helpful.
Administrative area	Not helpful in the case of Epping Forest District as the District boundary is not self-contained. However, EFDC has worked with several adjacent local authorities for various reasons, which gives some indication of potential functional market areas based on local authority boundaries: <ul style="list-style-type: none"> <li>• EFDC, Harlow and Uttlesford form the West Essex Alliance</li> </ul>



PPG Suggestion	Comment
	<ul style="list-style-type: none"> <li>• EFDC, Enfield and Broxbourne form the Lea Valley Task Force</li> <li>• EFDC has worked with Brentwood Borough Council on its previous employment land study</li> <li>• The Strategic Housing Market Assessment (SHMA) covers eight local authority areas. The 2008 study covers an area referred to as the <i>London Commuter Belt East M11 Sub-Region</i>, and comprises EFDC, Brentwood, Broxbourne, East Herts, Harlow and Uttlesford.</li> </ul>
Catchment area for cultural and social facilities	No information easily available, although it is likely that cultural and social flows will follow a similar pattern to retail i.e. highly dispersed over a broad area, and influenced by London and regional centres.
Transport network	Epping Forest District is part of the M11 London-Harlow-Stansted-Cambridge corridor recognised within the SELEP SEP. As well as the M11, the M25 cuts across the south of the District, and the London Underground network reaches into the District.

## 2.2 East of England Plan

Although the East of England Plan<sup>3</sup> has been revoked, it was adopted in 2008, and its approach to the local area is helpful in understanding the functional economic market area. This identifies sub-areas and centres within the East of England where there is scope for joint working on local issues. Epping Forest District is part of the *London Arc*, and Harlow is identified as a *centre for development*.

The London Arc comprises those areas strongly influenced by London. Policies for the London Arc (LA1) included:

- retention of the Green Belt, and regeneration in built-up areas
- developing the roles of individual towns in the polycentric settlement pattern
- working with adjoining local authorities to optimise the development of transport networks

There is a detailed policy (HA1) setting out the strategy for the development of Harlow. This includes:

- developing the town as a major housing and employment growth point, and developing the town centre

<sup>3</sup> Government Office for the East of England (May 2008) East of England Plan: Revision to the RSS for the East of England

- urban extensions in Epping Forest District and East Hertfordshire. Joint or coordinated Development Plan Documents were suggested for the three local authorities
- Green Belt review to enable the urban extensions, but maintaining its separation from other nearby settlements

At paragraph 13.55 (p.99), it is suggested that the growth of Harlow should:

*... meet a significant proportion of the development needs of the London Stansted Cambridge Peterborough growth area to 2021 and beyond, including in regard to employment activities related to the growth of Stansted Airport and housing, and to enhance Harlow's sub-regional status as an important centre for the surrounding areas of Essex and Hertfordshire.*

Therefore, it was expected that growth in Harlow would help towards meeting the growth needs of surrounding areas, including Epping Forest District.

### **2.3 Strategic Housing Market Assessment**

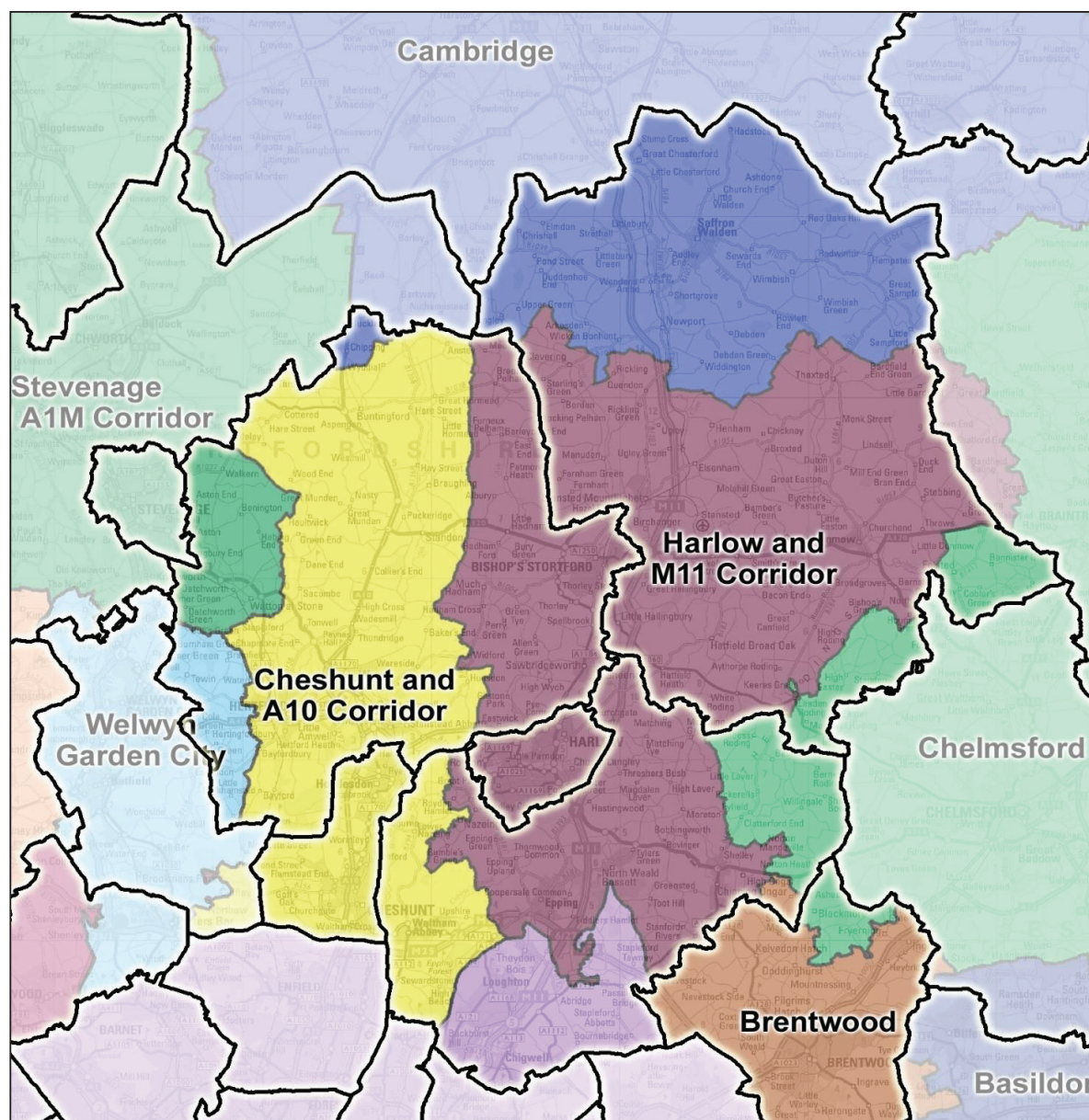
A report to inform the assessment of the strategic housing market was undertaken in 2013<sup>4</sup>. This covered a study area defined as *London Commuter Belt (East)/M11*, comprising: Brentwood, Broxbourne, East Hertfordshire, Epping Forest District, Harlow and Uttlesford. This built on an earlier study that only considered East Hertfordshire, Epping Forest District, Harlow and Uttlesford. The study refers to the Harlow Joint Working Area, which is presumably Harlow, Epping Forest District and East Hertfordshire.

The study presents a 2008 map of sub-markets within the study area (p.36: Figure 42). This shows Epping Forest District being covered by five sub-market areas.

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<sup>4</sup> Opinion Research Services (March 2013) LCB East Sub-Region Strategic Housing Market Assessment Update 2012

## Functional Housing Sub-Markets – 2008 (ORS, 2013<sup>4</sup>)



The report sets out household projections that were calculated by Edge Analytics in 2012. Modelling of future housing requirements undertaken by ORS presents a number of scenarios for future housing growth between 2011 and 2033. For Epping Forest District the numbers range from 6,200 (net nil migration scenario), through 15,800 (jobs-led scenario), to 16,700 (trend based scenario). Figures for Harlow range between 1,500 and 8,000; but for the Harlow Joint Working Area they range between 22,200 and 43,300.

### 2.4 Harlow

Harlow had a population of 82,000 in 2011, and this is forecast to grow by 14,000 by 2031. It requires a minimum of 7,500 new homes. Housing affordability is an issue. Harlow experienced a reduction in employment between 2008 and 2011. It is the location of an Enterprise Zone.

According to the local plan emerging strategy<sup>5</sup>, there is a need for the rejuvenation of the town centre, a broader mix of housing, upgrading of infrastructure, and an increase in the business base (p.12).

There are existing plans for 4,000 new dwellings at Newhall and land north of Gilden Way, and 5,000 new jobs on the Enterprise Zone. Creating a new Junction 7a on the M11 is necessary to enable much of the proposed development to take place (p.16)<sup>5</sup>.

With a 30% affordable housing target, 12,000 new homes are needed by 2031 to deliver Harlow's need for market and affordable housing (p.22).

Proposals for employment growth are to replace the c.4,000 jobs lost in the recession (2008-11), and create an additional 4,000 jobs, giving a total increase of 8,000 jobs by 2031. This would take employment in Harlow to 51,000 by 2031. This would require an additional 9,200 workers. This in turn requires a population increase of 23,000, and 11,500 new dwellings (p.23).

Five future growth scenarios have been set out, with employment change ranging from a loss of 1,000 jobs by 2031, to an increase of 18,000 jobs, with commensurate population changes. The three larger employment growth scenarios all include development in the Green Belt and in adjoining districts e.g. Epping Forest District.

The preferred growth scenario emerging from the Local Plan process is for employment growth of between 8,000 and 12,000 jobs, and housing growth of between 12,000 and 15,000 new dwellings. A maximum of 8,900 new dwellings can be accommodated within Harlow Council's boundary (p.34). Five options for accommodating growth have been suggested, of which three include some development within Epping Forest District.

#### **2.4.1 Consultation messages on Harlow**

- New town – intended to attract large manufacturing businesses
- Recent decline of large manufacturing in the town, but still lots of mid sized businesses. Large manufacturing businesses raison d'être of new town, hence hit harder than many other places
- Hit hard by recession. Lost jobs – particularly large manufacturing businesses, including GSK
- Distribution and warehousing and out-of-town retail also strong. Tesco distribution centre closed and consolidated at Waltham Cross (EFD). Poundland building large distribution centre on part of former GSK site
- Major industrial areas in Harlow (Pinnacles in west and Templefields in north) not very accessible to motorway, hence demand for M11 J7a
- Future growth (residential and employment) constrained by land availability
- Recently declining skills profile
- Potential for extensions beyond the local authority boundary i.e. into EFD
- Does this count towards EFDC's housing target?
- Scope to redraw boundary to include new developments into Harlow Borough – but unpopular with members
- Residents of new developments adjacent to Harlow likely to look to Harlow for services and jobs

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<sup>5</sup> Harlow Council (April 2014) Harlow Local Development Plan: Emerging Strategy and Further Options

- Little relationship with EFD
- Harlow is looking to promote significant economic growth, and needs housing to do this, but has limited land to enable housing growth
- A coordinated approach to housing numbers is being taken across EFDC, Uttlesford, East Herts and Harlow
- NLP carried out a Harlow regeneration study in 2013. Harlow needs to grow in order to support its town centre. But not clear how the growth of Harlow has been calculated
- M11 Junction 7a. Formal consultation planned for the end of summer 2014. To be funded by LEP funds and developer contributions
- M11 J7 at capacity. Cannot undertake further development because this is a constraint
- J7a – employment and 3,500 homes. Quarter of the development land is in EFD, and three-quarters is in Harlow
- Much of Harlow’s growth potential is linked to J7a
- Early residents of new town retiring. Depopulation in 1980s. Planning response – building more houses
- Town centre in decline. Need for regeneration
- Lack of ‘executive’ housing. Higher qualified worker commute into the town from outside
- Growth plans in RSS provided some confidence for investors in Harlow, but this has gone with revocation of RSS. RSS was proposing to concentrate growth in Harlow, but under current system growth is more likely to be dispersed
- Proposal for 5-10,000 home extension to Harlow in East Herts. Not clear what employment will be created here

#### Harlow growth

- NLP study and RTP employment land study (Harlow website) – link growth of the town and regeneration of the town
- Constrained land to deliver growth. Need for Harlow’s growth to be met in adjacent local authorities – spilling over the boundary. Considered green wedges, but they cannot accommodate much growth. Not had detailed discussions with adjacent authorities about economic growth
- Housing growth in EFD will contribute towards EFD’s needs, and also support growth and regeneration in Harlow. Later contradict this statement, saying EFDC needs to meet its own need, plus needs of Harlow
- Baseline need of 8,000 homes. More needed in order to deliver affordable housing requirement. Other options considered

## 2.5 Consultation messages on functional economic market area

- EFD is not self-contained in any way
- EFD is largely a dormitory place for people who work elsewhere

#### Relationship with Harlow and Enterprise Zone

- EZ originated from West Essex Alliance. Branded as ‘Harlow EZ’ but relates to a wider area – 1 hour catchment area

- Harlow provides employment, leisure and retail for surrounding areas. They provide residential choices of Harlow employees
- EFDC on board of Harlow EZ
- LSCC is more appropriate larger functional geography than the SELEP. LSCC – no money or formal constitution. Focus on lobbying and awareness raising. Commissioned study into demand for space for life sciences across corridor

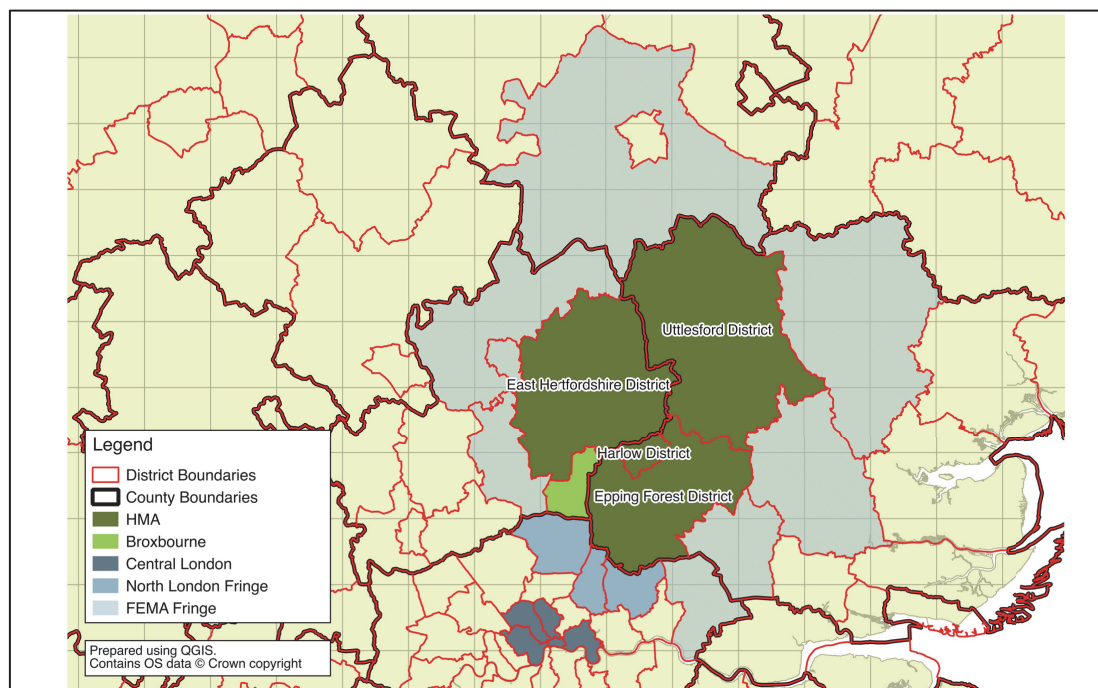
Harlow views on functional economic market area:

- Harlow recognised in revoked RSS as part of a broader sub-region
- Duty to Cooperate: working with EFDC and EHDC
- EHDC has not considered Harlow's need for growth in its emerging local plan
- Edge Analytics undertaken consistent demographic modelling for whole of Essex
- Harlow is home to the district hospital for the wider area, and the ARU campus
- Lack of a coordinated approach to employment growth and employment land needs across the broader sub-region. Not being considered under Duty to Cooperate

## 2.6 Updated SHMA and OAHN

In 2015 work was commissioned to update the Strategic Housing Market Assessment and the Objectively Assessed Housing Need. As well as work undertaken by ORS, Hardisty Jones Associates was commissioned to prepare economic evidence to support this<sup>6</sup>. This work defined a FEMA based on the housing market area rather than from an Epping Forest District perspective. The FEMA for the strategic housing market area is shown in the figure below.

### The FEMA of the strategic housing market area



<sup>6</sup> Hardisty Jones Associates (2015) Economic Evidence to Support the Development of the OAHN for West Essex and East Herts

## 3 Current Economy and Future Growth

Paragraph 21 of the NPPF sets out requirements of a local plan, including:

- an economic vision and strategy
- criteria or sites to meet the strategy
- support for existing business sectors
- plans for the growth of clusters and networks
- identifying priority areas for regeneration, infrastructure and environmental enhancement
- facilitating flexible working practices

NPPF and PPG set out the importance of town centres.

It is helpful to start with an overview of the socio-economic geography of Epping Forest District.

These issues are discussed in more detail in this chapter.

### 3.1 Geography

The physical and socio-economic geography of Epping Forest District can be divided into three broad areas:

- south: London fringe/M25 – driven by London economy and local services
- mid: market towns and Green Belt/rural area – local services and out-commuting
- north west: Harlow fringe. Predominantly green, but is the potential location for some of Harlow's growth

Important geographical drivers are:

- Major motorways which bisect the District - M25 and M11
- London conurbation to the south
- North Weald Airfield, which provides an opportunity for growth
- Harlow to north west of the District, which offers a significant growth opportunity

### 3.2 Existing economy and business sectors

#### 3.2.1 Key sectors

According to the 2010 Employment Land Review<sup>15</sup> there are three main employment sectors in Epping Forest District:

- Distribution, hotels and restaurants (25.5%)
- Banking and finance (23.9%) [Which doesn't concur with the Prosperica analysis below]
- Public services (20.7%)

Prosperica (2014) shows that Other Business Services accounts for around 18% of workplace based employment in Epping Forest District. Prosperica (p.6) does not show banking, but shows that financial services is small, and proportionally less than the England average.

The ONS Business Register and Employment Survey (BRES)<sup>7</sup> for 2012 shows that:

	Epping Forest (employ ee jobs)	Epping Forest (%)	East (%)	Great Britain (%)
Primary Services (A-B: agriculture and mining)	0	0.1	0.2	0.3
Energy and Water (D-E)	400	1	1	1.1
Manufacturing (C)	2,300	5.2	9.4	8.7
Construction (F)	5,200	12.1	5.3	4.5
Services (G-S)	35,300	81.7	84.2	85.5
• Wholesale and retail, including motor trades (G)	7,100	16.3	18	16.1
• Transport storage (H)	1,400	3.3	5	4.6
• Accommodation and food services (I)	3,500	8.1	6.5	6.9
• Information and communication (J)	1,000	2.2	3.5	3.9
• Financial and other business services (K-N)	10,400	24.1	21.4	21.5
• Public admin, education and health (O-Q)	9,700	22.3	26	28.1
• Other Services (R-S)	2,300	5.2	3.8	4.5

In terms of relative concentration of employment, the Prosperica analysis<sup>8</sup> (2014) states that:

*Epping Forest has much larger percentages of its workplace-based employment in the Construction and Distribution sectors than has England as a whole. Balancing these are much lower percentages in Financial services and Public administration, education and health.*

Prosperica (p.9, Table 2) looks at employment at the two digit SIC level:

Sectors	Number '000	Percentage of total
Education	4.5	10.7
Retail trade	4.5	10.5
Food and beverage service activities	2.9	6.9
Construction of buildings	2.4	5.6
Wholesale trade	2.4	5.6
Specialised construction activities	2.1	5.0
Sports activities and amusement and recreation activities	1.5	3.6
Human health activities	1.4	3.4
Residential care activities	1.4	3.2
Warehousing and support activities for transportation	1.3	3.1

This suggests that the major employment sectors are based on activities that meet local needs rather than exporting, other than construction which exports labour on a daily basis. It is notable that two construction sectors are listed in this table. However, the location of two major building

<sup>7</sup> <https://www.nomisweb.co.uk/reports/lmp/la/1946157216/report.aspx?town=epping%20forest>

<sup>8</sup> The Employment Structure in Epping Forest District (March 2014) Prosperica Ltd



businesses' administrative HQs in the District (Higgins and Kier) may account for part of this concentration of employment.

Prosperica's (2014) analysis (p.10/11) suggests that Epping Forest District has a lower concentration of employment in knowledge intensive sectors than England. Growth in knowledge intensive employment between 2008 and 2011 is attributed to a growth in employment in education.

The ELR stated that strong growth had been seen in construction (5.4% p.a.) and transport & communications (7.4% p.a.).

### **3.2.2 Out-commuting**

Prosperica (2014) confirms that there is substantial out-commuting, and net out-commuting, and this is expected to continue in the future. Prosperica suggests that employment in construction, although notionally based in the District, actually creates further travel to work outside of Epping Forest District. Prosperica suggests that this is the case for other sectors too. Prosperica quotes the 2001 Census as showing that 62% of resident workers commuted out the District for work, including 45% of the District's resident workers who commuted to London. Epping Forest District is the largest net exporter of commuters to London amongst all of the Essex districts. Commuting into London appears to be increasing.

### **3.2.3 Business population structure**

Prosperica (2014) suggests that there is a high density of businesses per resident, even given the high level of out-commuting, and that there are relatively few medium and large businesses, so concludes that the business population is dominated by small businesses. The sectors with the largest numbers of businesses are:

- construction
- professional, scientific and technical
- retail
- business administration and support services
- property
- wholesale
- ICT
- arts, entertainment, recreation and other services

### **3.2.4 Consultation messages on the existing economy and business sectors**

- Harlow has manufacturing employment, but there is not a lot of commuting from EFD
- EFD has a service economy – serving the resident population
- Glasshouse industry is very visible, but does not generate a large number of jobs. Jobs are seasonal and attract immigrant workers. Desire by operators to expand/grow the industry, but limited by planning constraints. Potential for a criteria-based policy for new allocations. Existing sites are not considered as brownfield, but could be re-used e.g. for residential
- Some limited areas of deprivation in Waltham Abbey and Debden. Can EFDC's economic development approach do anything about this?
- Not sure that there is an unemployment problem

- EFD has no central place. Fragmented. No agglomeration
- Out-commuting to London is a core part of the economy, and there is no desire to change this
- Central line at capacity. Little scope to increase number of commuters
- Commuters parking close to the stations causes a problem. Prevents people parking to access the town centres during the daytime
- Potential to extend commuter train services to Ongar
- Potential for P&R at North Weald – but unlikely that this will be done
- Broadband coverage/capacity poor in rural parts of the District. Would like to offer free wifi in town centre
- Majority of working residents travel out of the District for work. Nice place to live – dormitory area. Don't want it to change
- 8 underground stations
- Green Belt, flood plains and Lea Valley Regional Park are constraints on significant development in the District
- LVRP has historically been opposed to development, but this may change
- North Weald Airfield and Langston Road are the major development opportunities
- Housing affordability is a problem for young people
- Some deprivation in Waltham Abbey and Debden
- Retaining existing businesses is important. As businesses grow, they cannot find suitable and affordable premises, so leave the local area
- Need for grow-on business units. Potentially live-work units. Potentially a business hub with flexible office space

### 3.2.5 The rural economy

The previous Local Plan and Alterations had criteria-based policies on farm diversification. There was a preference for employment generating uses from any building conversions within the Green Belt to promote a 'living and working' countryside.

Promotion of farming in EFD contributes to food security, and helps reduce emissions from transport of food from more distant places. EFD located on periphery of London – one of the largest food markets in the world.

Concerns have been expressed about HGV access to employment in rural areas.

Ideas for policies for growth in rural areas, include criteria-based policies for:

- diversification of agricultural practices
- change of uses or conversion of redundant buildings
- promotion of tourism and leisure activities

The latest LEADER Local Action Group for the Essex Eastern Plateau includes much of Epping Forest District. Plans for the LAG are currently being developed. The previous programme for the Eastern Plateau delivered £2.1 million of RDPE funds, and a total of £4 million of investment. Its four priorities were:

- assistance to rural communities to develop better services and activities

- encouraging and supporting farm diversification
- encouraging the start up and development of rural businesses
- encouraging and supporting rural tourism

### **Consultation messages on the rural economy**

- Significant part of EFD is rural with small settlements, and these need an economic role.
- Eastern Plateau Local Action Group seeking funding
- Will require a Local Development Strategy
- Problems with lorries accessing employment sites in rural areas
- Potential to relocate some employment out of rural areas

#### **3.2.6 Skills and qualifications**

Prosperica (2014) states that whilst residents' earnings are higher than average, the skills profile is lower than that for England, which is unusual as low skills usually correlate with low earnings.

#### **3.2.7 Location of employment**

Prosperica (2014) has undertaken an exercise to consider where businesses are located in Epping Forest District (p.22). Prosperica divided the District's wards into: major town centres; minor town centres; employment areas; suburban areas; and rural. According to this analysis, the suburban wards host the greatest amount of employment: 44%, compared to 21% in employment areas and 19% in the major town centres. Prosperica does note that education, health and other public services are likely to be located in the suburban wards.

#### **3.2.8 Business survey**

The 2010 ELR included a business survey which found that:

- there was a high level of satisfaction with business premises, and only 2% of respondents claimed that their premises were unsuitable
- 42% of local businesses are looking to expand, particularly medium and large businesses located in Epping, North Weald and Ongar
- 43% of these would need additional floorspace, and most could not accommodate this at their existing premises
- modelling of the survey data and ABI data suggested that existing businesses would need an additional 42,125 sq m of business space over the next five years (presumably to 2015)

#### **3.2.9 Future employment growth**

In 2010 Atkins forecast a net employment growth of 1,000 jobs by 2031. The majority of this would be in B1 business space, accounting for 43,700 sq m and 5.83 Ha of employment land. This was claimed to be an optimistic view of employment growth, and it stated that EEFM forecasts are lower than this.

#### **3.2.10 Retail**

Consultation messages on retail:

- Brookfield Farm Shopping Centre to the west is contributing to a decline in Waltham Abbey town centre
- Major supermarket is also drawing spend out of the town centre
- Westfield, Lakeside and Bluewater all draw comparison spend out of EFD. Unlikely to change much
- Significant leakage of retail spend out of the District esp. to major retail centres such as Westfield and Lakeside
- Potential for more craft shops/workshops in the town centres – but would need subsidy
- Local shopping loyalty scheme. Not hugely successful
- Tourism, arts/culture and cafes are at the heart of town centre revitalisation

## 4 Economic Vision and Strategy

### 4.1 Epping Forest District

There is no economic strategy for Epping Forest District in place. A report to the Council's cabinet in February 2014<sup>9</sup> set out the high level themes that guide economic development in the District.

These are:

- policies and approaches for productive landscapes including glasshouses and pack houses
- tourism next steps - marketing of what the area has to offer visitors
- infrastructure including transport and high speed broadband
- the skills agenda - in particular the role of Epping Forest College and the opportunities at Stansted airport
- further opportunities at North Weald Airfield for employment, aviation and events
- analysis of what businesses already exist, and what support they want to develop
- links to supply chain from the growth of the West Essex [Harlow] Enterprise zone, in particular Medical Technologies;
- promotion of the unique selling points of the District, i.e. special character, great place to live, work and do business, links to London
- plans for other Epping Forest District Council assets
- links with those making significant inward investment

The main areas of activity proposed in the report include:

- appointment of an Economic Development Assistant
- continuation of the Town Centres Fund (£35,000) – to undertake projects to support the main high streets
- support the Food Task Force (£30,000) – to pay for further work on the growth potential of the food sector
- provide a post to follow through the recommendations of the Tourism Task Force – to exploit further potential growth in this sector

Economic development activity is currently carried out by a range of EFDC staff on an ad hoc basis. There is an economic development officer.

Key aspects of the local economy identified in the report include:

- Significant out-commuting of residents – to London, and also out-commuting of construction workers
- A significant small business sector
- Relatively higher earnings than would be expected from an analysis of residents' qualifications
- Identifiable town centres and industrial estates (but not business parks)
- A relatively low female employment rate

Economic development opportunities for Epping Forest District include several transport schemes:

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<sup>9</sup> C-066-2013/14 An economic strategy for the District, and resources to go with that

- Changes to the M25, and a new Junction 7a of the M11
- West Anglia rail line improvements, Crossrail2 and Central Line issues
- Stansted airport

There is potential for the District Council to make effective use of its asset base.

## 4.2 Local Strategic Partnership

One Epping Forest (OEF) is the Local Strategic Partnership (LSP) for Epping Forest District. The LSP's aim is:

*Together making Epping Forest a great place to live, work, study and do business*

OEF was responsible for economic development in Epping Forest District, but this has now been taken back into EFDC.

The LSP's vision is:

*Making the most of our proximity to the capital while dealing with the challenges this poses to the protection of our green and unique environmental heritage. Building thriving, growing, cohesive and sustainable communities where improving quality of life, aspiration and attainment are achievable for all residents. A place where the different villages, towns and communities that make up our district are cherished and the public services that support them, work together as ONE, committed to excellence and efficiency*

Emerging priorities and themes (identified in Appendix 1 of EFDC's report to Council, 2014<sup>9</sup>) include:

- Developing and resourcing productive landscapes
- Developing an integrated and coordinated approach to tourism
- Developing an infrastructure of business support focusing on: business start-ups/young businesses; High Street businesses; and high speed broadband in rural areas
- Expanding the Higher education offer in the District
- Tackling long term youth unemployment
- Securing inward investment
- Building effective partnerships

OEF has prepared an Epping Forest District profile. The highlights of this are:

- Epping Forest District is significantly rural and 94% Green Belt
- Despite significant wealth, it contains some of the most deprived places in Essex, particularly in Waltham Abbey
- It has significant traffic and congestion problems
- There are good transport links in and out, but can be difficult to get around without a car
- There is a significant need for affordable housing
- There is a requirement for jobs and the infrastructure to support them
- It has a lower forecast rate of population growth than Essex
- It has an older population than the England average
- Epping Forest District has high house prices, making housing difficult to afford

### 4.3 West Essex Alliance

West Essex Alliance is a member of SELEP. It comprises: Epping Forest District, Harlow and Uttlesford<sup>10</sup>. Its objective is:

*Promoting economic prosperity in West Essex*

It is working for:

- The creation of new business
- The retention and growth of existing businesses
- Increased inward investment and tourism
- Sustainable economic growth and regeneration

West Essex Skills and Employment Study, February 2013

Harlow Enterprise Zone: Skills Requirements Study, February 2013

### 4.4 Harlow Enterprise Zone

The concept of the Harlow Enterprise Zone was originally developed as the West Essex Enterprise Zone. Its core objectives are<sup>11</sup>:

- The development of two sites to provide high quality, modern business space meeting the needs of businesses in the ICT, Advanced Manufacturing and Life Science sectors
- The location of 100 businesses and the creation of a minimum of 2,500 jobs with the potential to create more than 5,000 jobs over a 25-year period
- Increase the GVA of the West Essex sub-region through inward investment and enabling the growth of existing companies through re-location, expansion and supply chain opportunities
- The creation of employment opportunities for local residents

It comprises:

- London Road North: 14 Ha of greenfield land with planning consent. No development partner yet in place. Aspiration for a medical technologies science park, linked to Anglia Ruskin University. Expected to be available December 2015
- London Road South: Plans for 20,000 sq m of Grade A office space and a data centre. Work expected to commence mid 2014. Plans for Anglia Ruskin University's medical technologies innovation centre
- Templefields: An existing industrial estate offering space for SMEs, and redevelopment opportunities

There is a proposal for the development of Junction 7a of the M11, which will support the delivery of the Enterprise Zone. Forecast delivery of this is in 2018/19.

#### 4.4.1 Consultation messages on the Harlow Enterprise Zone

Key sectors

<sup>10</sup> <http://www.westessexalliance.org>

<sup>11</sup> <http://harlowez.org.uk>

- Existing strengths - life sciences, advanced manufacturing and ICT
- London Road North – science park – medical technologies focus. Currently commissioning work on demand [Same study as mentioned above?]. Astra Zeneca move to Cambridge is spurring interest in the East of England. Potential for AZ supply chain? Key competitors – Cambridge, Stevenage, London. Cheaper than Cambridge and London
- USP – affordable manufacturing location for life sciences sector, complementing R&D in Cambridge and London

#### Economic potential

- 5,000 jobs. Mainly at London Road North and South
- Higher skilled jobs than those already in the town

#### London Road North

- Currently greenfield – playing fields. HDC trying to buy this
- Proposal for science park. New road into north of site. Looking for a development partner
- Planning framework in place - LDO
- Anglia Ruskin University proposing to locate medical technologies innovation centre on the site, including postgrad research

#### London Road South

- Existing buildings – former Nortel campus. High capacity broadband link into site. Furthest extent of ‘instantaneous’ communications with City of London. Finance sector needs ‘instantaneous’ data transfer
- LDO in place
- Development partner in place
- Refurb of 200,000 sq ft of existing office space. Currently little good quality office space in the town
- Proposal for a data centre on site. May spec build

#### Templefields

- Existing industrial estate in north of town. Very mixed sizes and quality. Some high tech manufacturing including medical technologies
- LDO in place
- Plan to redevelop slowly into modern business park
- Potential to redevelop large warehouses for more intensive uses. Could relocate distribution occupiers to new J7a
- c.40 landowners – difficult to work with
- Needs on-site road improvements. J7a would increase land values and viability of redevelopment
- Potential relocation of civic amenity site opens up a development site. HDC proposing ‘grow-on’ units

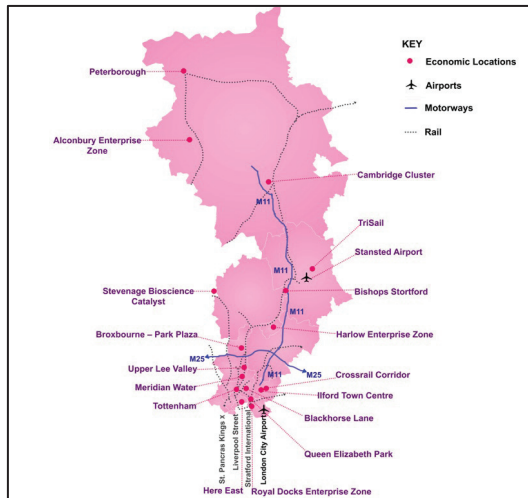
#### Training and skills

- Harlow University Technical College (UTC) to open soon. 14-19. Harlow FEC and Anglia Ruskin University



- Focus on medical technologies. NVQ3 vocational skills
- Drawing students from EFD as well as Harlow

#### 4.5 London Stansted Cambridge Corridor (LSCC)



According to the LSCC website<sup>12</sup>:

*The principal objective of the consortium is to drive economic development and enhance quality of life in the north London – Stansted – Cambridge corridor. This means not only driving job growth through productivity and investment, but more importantly increasing economic activity, by ensuring local communities access employment opportunities*

LSCC covers a large area, and is considered as a functional economic market area. It is claimed that there is a high level of self-containment within the corridor, so investments within the corridor will generate a high rate-of-return for places within the corridor.

It has produced an agenda for growth in the corridor area<sup>13</sup>, which was intended to inform the strategic economic plans of the four LEPs that it straddles. Sectoral strengths in the LSCC area are:

- life sciences and medical
- IT, digital and media
- low carbon, clean tech and energy from waste
- food production
- business services
- engineering, transport, logistics and distribution

With regard to the above sectors and Epping Forest District, glasshouses for food production is specifically mentioned in the LSCC agenda. It has also been mooted that glasshouses could play a role in the life sciences sector.

The LSCC claims to have identified sites to accommodate 117,000 new homes and 170,000 new jobs over the period to 2032. Harlow Enterprise Zone is one of the key nodes within the corridor.

<sup>12</sup> <http://lsc.co/about-lsc-2/objectives/>

<sup>13</sup> LSCC (January 2014) An Agenda for Jobs, Growth and Improved Livability

For Epping Forest District (and the other Essex and Hertfordshire districts), the opportunities created by the LSCC are (p.14):

- Proactive cooperation and coordination at the seam between multiple LEPs;
- Positioning the districts as key locations in the UK's advanced growth corridor;
- A shared infrastructure agenda benefiting local businesses and residents;
- Supporting the nationally designated enterprise zone at Harlow

The investments requested by the LSCC include several of relevance to Epping Forest District and its local area:

- rail improvements, including to the West Anglian route and the Lea Valley line
- M11 Junction 7a
- Harlow Enterprise Zone
- science parks (presumably included in the above)
- business support in the form of investment, technology transfer and network development
- Ensuring that young people have the skills to access the employment opportunities that are created, by working with the FE colleges and University Technical Colleges

#### **4.6 Economic Plan for Essex**

EFDC economic strategy report, February 2014, suggests that there is an Economic Plan for Essex that replaces the Essex Economic Growth Strategy (2012).

In a report on its economic plan<sup>14</sup>, Essex County Council has put forward a programme of transport and non transport projects, intended to inform the SELEP's Strategic Economic Plan (SEP). The SEP is expected to be agreed in the autumn of 2014 and implemented from April 2015. This will determine the amount of Single Local Growth Fund (SLGF) devolved to places within the South East, such as Essex.

ECC has committed £115 million towards growth projects over the next six years.

Essex's strategic growth corridors [presumably including West Essex/M11 corridor] are the basis for investment in housing and jobs. Investment in transport infrastructure is at the heart of the growth plans for the corridors. Finance, business support and workforce skills are also important aspects of the growth plan. Working age population is set to decline, so productivity must increase.

The report mentions an Essex Growth Deal. The 'ask' to central government for SLGF will be matched with funds from the County Council and District, Borough and City Councils, along with private sector investment. A total local investment package of £412 million is proposed, as part of a £755 million investment plan.

West Essex projects in the emerging draft Economic Plan for Essex are:

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<sup>14</sup> Essex County Council Report to Cabinet, 25 March 2014, Economic Plan for Essex and the Linked Strategic Economic Plan

Area of Essex	Name	Description
Epping Forest District	North Wield Airfield	Development of homes and the creation of an avionics hub for the South East of England.
Harlow	Harlow Enterprise Zone London Road Enabling and Delivery	This project will be to deliver a range of site acquisitions and up front development work and enabling infrastructure to support the development of the Enterprise Zone and de-risk the site for potential investors/occupiers.
Harlow	Templefields Development Package & Civic Amenity	Package of improvements to improve the Templefields North East industrial estate to attract businesses from the Harlow Enterprise Zone's target growth sectors to locate in the area.
Harlow	Harlow Manufacturing & Engineering Centre	Creation of a state of the art, employer-led training facility that directly supports the business growth and workforce development needs of local employers. The Centre would be linked to Harlow College, building upon their existing engineering offer and relationships with key local employers.
Harlow	Medtech Campus - Harlow	Package of tailored business support and the development of a MedTech Business Park in Harlow.

## 4.7 South East Local Enterprise Partnership

Strategic Economic Plan, March 2014.

Targets for:

- private sector job creation
- new homes
- leverage of investment

Five elements:

- Establishment of a revolving property investment fund (SEFUND)
- South East transport deal
- South East productivity deal
- South East skills deal
- South East housing growth deal

Federal governance structure with four local area delivery partnerships – including Essex. West Essex sits beneath this.

Twelve growth corridors/areas, including M11-London-Harlow-Stansted-Cambridge. Target for 18,250 jobs and 20,230 homes (*accommodate* 1,050 jobs and 1,230 homes by 2021; and *facilitate* 17,200 jobs and 19,000 homes). Harlow Enterprise Zone is a key node within this. Creation of the M11 Junction 7a is key to delivering this.

#### **4.8 Consultation messages on economic vision and strategy**

- No strong vision for economic change – maintain the status quo
- Out-commuting to London is an important source of employment – three tube stations and a national rail station. Part of the nature of the place, and no desire to change this

## 5 Sites, Premises and Infrastructure

### 5.1 Sites and premises

The 2010 Employment Land Review (ELR)<sup>15</sup> reviewed 42 sites in Epping Forest District, of which 21 were in rural areas and 21 in urban areas. 67% of the sites in the District were 'average' and 3% were 'poor.'

Vacant and opportunity land provides a theoretical capacity of 46,000 sq m [of what?].

The 2010 ELR concluded that provision for an additional 66,000 sq m [of what?] was needed in Epping Forest District to 2031. The risks associated with under-provision of additional land included:

- an increasing dormitory role for the local area, with increasing out-commuting
- fewer local jobs for local residents
- local businesses being forced to relocate outside the local area in order to fulfil their expansion plans

#### 5.1.1 Consultation messages on sites and premises

- Low vacancy rates in EFD's industrial estates
- Not a large number of employment sites in EFD
- Every district is complaining about lack of grow-on premises. Not unique to EFD
- May need investment from EFDC – possibly for delivery of flexible workshop space
- Private sector is already providing serviced office space at affordable prices: M25 Business Centre close to M25 J26 – Booker Road, Waltham Abbey
- Town centre offices – competing with residential for space above shops
- Could vacant shops be used as office space?
- EFD does not have any major industrial or commercial development opportunities
- Not much flexible office space in Essex. Some demand from contact centres/back office/shared service centres
- Not much grade A office space in Essex. Recent market study to be provided
- Langston Road is interesting because of Underground connectivity, but London Road South less so because of poor public transport links
- Harlow has low quality office stock, so does not appeal to high quality occupiers

#### M25 Business Centre at Waltham Cross

- Established to provide high quality, flexible office space
- Refurbished building close to M25 J26
- Entirely privately funded speculative investment
- 50,000 sq ft with gym and bistro – 500 jobs?
- Some tenants already in place – professional services and new start businesses

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<sup>15</sup> Epping Forest District and Brentwood Borough Employment Land Review: Final Report (September 2010) Atkins

## 5.2 Infrastructure

Consultation messages on infrastructure:

- Mainline rail to the west of the District. Has potential
- Lack of good quality, modern sized offices and retail units. Stock is too old and too small – doesn't meet modern needs
- Potential for more offices above shops, but risk losing these to residential conversions

M11 Junction 7

- A small amount of headroom in the junction's capacity, but will be taken by growth in Harlow
- Enterprise Zone proposals will cause more load than the junction can take
- Potential to accommodate a bit more growth through improvements to the junction

M11 Junction 7a

- Project is out to consultation, but not yet a fully formed project. No evidence provided to HA
- Harlow has not yet properly considered alternative options in order to arrive at the preferred option. Could be scope for further improvements to J7 and J8
- Traffic model is not sufficient – poor quality data
- Optimistic timescale – start construction in 2019, with completion within 12 to 18 months
- West-facing only junction
- In EFD. Planning application to EFDC next year
- c.5 years to deliver. Seeking £50m from SELEP, Essex CC, central government and developer contributions
- Highways Agency now more positive about this. Route based strategy for M11. Restrictions on level of development on two EZ sites until J7a in place
- Unlocks housing and employment sites in Harlow and EFD. Landowners promoting sites adjacent to J7a
- Potential for distribution site adjacent to J7a. Want to relocate existing distribution from town to J7a, reducing HGV traffic in town and allowing more intensive redevelopment of current sites

## 5.3 Epping Forest District Council Assets

Consultation messages on EFDC assets:

EFDC's property portfolio. Members want to maximise the income from this and reinvest any receipts from disposals into redevelopment of existing sites

- North Welad Airfield
- Debden Broadway shopping area. 60 units. Needs some updating
- Two industrial estates at Debden and Waltham Abbey
- Depot at Langstone Road – to be developed for a new retail park
- Some shops
- Some car parks
- Some land holdings as part of the St Johns Road development area in Epping
- Six pubs



## 6 Clusters and Networks

### 6.1 Glasshouse industry

The glasshouse industry in the local area is concentrated into the Lea Valley, in particular in Nazeing, Roydon and Waltham Abbey. The main crops are cucumbers, sweet peppers, tomatoes, aubergines, lettuce, herbs and some flowers. There is strong competition from overseas and other parts of the UK. According to EFDC, Agriculture and Horticulture employed 2,700 people in Epping Forest District in 2010. It is believed that the glasshouse industry accounts for 1,100 of these jobs. It is estimated that the sector's supply chain supports another 500 jobs in a range of sectors.

According to the Lea Valley Growers Association:

- the glasshouse/horticultural industry employs around 1,000 people in Epping Forest District, out of 2,000 in the Lea Valley
- of these, 1,100 are manual/packing jobs, 350 are skilled crop workers, 250 are managerial and clerical, and 300 are in transport and logistics
- there are also an unspecified number of supply chain jobs.

The packhouses that act as intermediaries between the growers and the buyers also deal with imported produce, so are busy throughout the year and not just within the local growing season. Packing is an industrial activity that is inappropriate in the Green Belt, and which generates significant HGV movements.

A review of the sector and its potential has been undertaken<sup>16</sup>. According to the review, the sector has been declining in area, and less so in output in recent years. Applications for new or replacement glasshouses in the Lea Valley has fallen since 2006. Many growers believe that future viability is dependent on new large-scale developments. The minimum feasible size of a unit is likely to double over the next 20 years. Growers in the Lea Valley are smaller than the national average, which impacts on the viability of their businesses. The areas based policy is seen as successful in terms of promoting containment and clustering. Unless the sector declines, it is likely that new designations will be required. Access to energy is a key issue for the industry. Local residents object to the traffic implications of developments, but not the developments per se.

Key recommendations of the review study:

- EFDC should adopt a clear vision for the sector, with sufficient designations
- Support large-scale developments in the industry – in the east of the District
- Increase designations for medium-size growers
- Growers and the Council should work together to develop new sites
- Steps to avoid dereliction of unused sites should be taken

The Lea Valley Growers have set out a vision for the future of the industry<sup>17</sup>:

<sup>16</sup> Laurence Gould Partnership Ltd (2012) The Lea Valley Glasshouse Industry: Planning for the Future

<sup>17</sup> Email from Lee Stiles, 30 May 2014



- Growers with turnover of less than £5 million p.a. would like to extend their existing sites. Any potential site should be up to 40 acres to allow for expansion, with access to renewable energy. A central marketing organisation to support growers would be helpful. Access to a local workforce, including managerial staff, would be helpful. Encouraging skills and training, and raising the profile of the sector will attract new entrants
- Growers with turnover of more than £5 million p.a. would like sites of up to 50 acres per grower, to allow for expansion. Access to renewable energy, workforce and training are also important

Technological advances and the need for economies of scale mean that glasshouses need to be larger and higher than previously. There is also a need for better quality worker accommodation, which is inappropriate in the Green Belt. New sites will need to be accessible to the transport network, and there is a desire for larger glasshouses and packhouses to be co-located.

Previous Local Plan policies have sought to concentrate glasshouses into designated areas within the Lea Valley. In the future a criteria based policy is preferred, which would help to achieve the objectives set out above. This could lead to the growth of the industry taking place over a larger area than its previous concentration in the Lea Valley. There is also a desire for future policy to deal with redundant glasshouses, preventing dereliction, and leading to the appropriate re-use of redundant sites.

#### **6.1.1 Consultation messages on the glasshouse industry**

- Lea Valley Food Taskforce – covers EFDC, Enfield and Broxbourne, although EFDC seen as the main driver. Limited resources, particularly for core administrative work. Need for core funding
- Lee Valley Growers Association. Some limited supported funded by the NFU. Setting out a vision for the industry. Local businesses need to get a lot larger
- The industry has been contracting in size since 1950s, although productivity and output are increasing. UK is a net importer of horticultural products. Growth of the glasshouse industry in the local area could contribute to the sustainability of the UK food chain
- Much of the labour is seasonal, and much of this is met by immigrants, especially from Eastern Europe, who are recruited informally by word-of-mouth. Few local people are employed, and there is a reluctance to use local labour
- Around 2,000 jobs in EFD, and around 2,500 in total in the Lea Valley
- Average site size is one acre, although they vary in size
- Pack houses aggregate and distribute the products
- The industry receives no subsidies, and is operated on a wholly commercial basis, hence has little interaction with government
- Sites are under pressure from alternative uses, especially residential, and the industry is gradually being driven further away from London. Some sort of intervention is needed to keep the industry in the local area
- Much of industry lies within the Lea Valley National Park, which does not have a remit to support food production. LVNP recently opposed a 90,000 sq m glasshouse development, but the development has been allowed
- Much of the supply chain spend, in terms of equipment and R&D is coming from the Netherlands, not the UK

- Planning is a major issue for the future of the industry. Historically there have been designated areas, but a criteria-based approach may be more suitable in the future
- Potential for linkages to the life sciences and pharmaceuticals industries – growing plants for these industries
- Energy is a major cost for the industry. Potential to use waste heat from other sources e.g. power stations
- Water-borne transport from EFD into central London is feasible
- Source of employment within Green Belt. Need to up-skill local people via FEC qualifications to enable them to work in the industry

#### Lea Valley Task Force: Seven areas for action

- Employment Bridge – intended to support local people to enter into employment in the industry. Intended that growth in employment in the industry will create jobs for local people, and that local people can replace immigrant labour in existing jobs. Not many high-skilled jobs, but the industry does tend to pay above the minimum wage
- Planning Policy – Trying to establish common planning policies across a wider area: EFDC, Waltham Forest, Harlow, Broxbourne, Enfield and Uttlesford. Trying to get food recognised as a core sector within the LSCC strategy
- National Institute for Food Security – An idea that is in development at present. Budget is in place for a feasibility study. Focus on R&D associated with growing under glass and food production adjacent to major conurbations. Some initial conversations with the University of Essex and the University of Reading
- Food Summit – Event planned for later in 2014. Present some of the Task Force findings
- Growing Place – Enabling London residents to make use of unused allotments
- Skills for Growing – Potential to create an NVQ in horticulture with Epping Forest College. Hope to set an industry standard
- Land Bank – Idea to use the SELEP capital fund to buy land that is consented for growing, and lease it to growers

#### Scale of sector

- Retail value of £1 billion. Most important glasshouse area in the UK
- Historically 1,100 acres, now down to 300 acres
- UK is 30% self-sufficient in salad crops, so huge potential to displace imports
- Six packhouses in Lea Valley which agglomerate crops and sell to supermarkets. Orders are placed 6-12 months in advance. Top-up with foreign imports if the local growers cannot satisfy requirements
- Growing season January to November, 4-6 week gap without produce, but packhouses continue to work with imported crops

#### Employment

- 2,000 jobs in the glasshouse industry in EFD. 90% overseas workers, 10% local
- 10% seasonal increase in the summer
- Jobs are year-round

- Locals have poor awareness of the industry, its opportunities, and poor understanding of the career potential
- Food Task Force – helping to get ore local people into the sector. 500 local unemployed young people
- Entry level jobs in packhouses (warehousing), but higher skilled jobs in growing, management, sales etc
- Working with EF College to develop a City & Guilds qualification

#### Future growth

- Potential for local workers to displace foreign workers, and for growth in the scale of the sector
- Concur with Laurence Gould study
- Could deliver an additional 300 acres, which would create 1,500 to 1,800 new jobs
- Replacing foreign imports, and growth of London mean that there are market opportunities
- Want a criteria based approach to planning for growth
- Glasshouses can be developed in the Green Belt

#### Barriers to growth

- Lea Valley Regional Park has bought land around glasshouses and prevented expansion of the sector
- Some planning issues over height of glasshouses (now need to be 7 metres), but have been overcome
- Need for renewable energy. Heat for growing becomes a by-product of generating power. Using CHP, some bio-mass and limited AD

## 6.2 Tourism

#### Consultation messages on tourism

- Potential for growth of the tourism industry. Waltham Abbey, Gunpowder Mills, Whitewater centre. Forest draws in visitors, but probably generates little economic benefit for the district. Forest is more of a marketing tool
- Forest is a visitor draw. Brings in about 8 million visitors a year – although question validity of these numbers. Mainly local and day visitors
- Little good quality visitor accommodation
- Potential for interpretation boards/maps to guide visitors around the towns
- Scope to improve the quality of public space e.g. flowerbeds etc
- Waltham Abbey and Hunting Lodge – tourist attractions. Potential for music festival
- Potential to increase tourism. Tourism strategy being developed. Plans for a tourism officer at EFDC
- Olympic whitewater centre: adjacent, but not in EFD
- Olympics and Tour de France have been good at raising the profile of EFD
- Working on a tourism strategy for the District
- Planning to employ a tourism officer

#### Epping Forest

- The forest has a European designation, which restricts adjacent development because of the impact on air quality
- Owned by the City of London Corporation. Buying buffer land around it to protect it

- Tourism draw for day-trippers. Local pubs may benefit
- Makes EFD an attractive place to live, hence contributes to the economy in that way

## 7 Future Development Opportunities

There are a number of major development opportunities in Epping Forest District. These are discussed below.

### 7.1 Consultation messages on regeneration, infrastructure and environmental enhancement

Major regeneration and development opportunities (EFDC involvement)

- North Weald Airfield
- Waltham Abbey. Colliers have been commissioned to undertake a study to look at the opportunities here
- Debden. TfL wants to undertake development on the car park of its tube station at Debden, including residential development

Update of RTP 2010 town centre study proposed

### 7.2 North Weald Bassett and Airfield

EFDC has commissioned a masterplan for the future development of and investment in North Weald Bassett, including North Weald Airfield<sup>18</sup>. This masterplan refers to a Deloitte study carried out in 2013 which considered different scenarios for the future development of the Airfield, and identified a preferred option of mixed-use development including continued aviation use, employment, leisure and 1,670 new homes. Employment accommodation was envisaged as hangars and dedicated employment premises. The Allies & Morrison report states that the Deloitte report suggested over 31,000 sq m of employment space. There is a local pressure group that wants to keep the Airfield operating.

The report states that the level of employment in the local resident population is higher than the national average, and the proportion that work full-time is higher than the national average. More people travel to work by car than the national average, and usage of the Underground to travel to work is high (in keeping with the District as a whole). Levels of deprivation are low in the local community.

The Allies & Morrison report states that the 2010 Employment Land Review for Epping Forest District identified two sites at North Weald Airfield for intensification, extension of redevelopment, which could deliver 13,139 sq m of B1 to B8 floorspace. The report also states that the SLAA identifies a potential yield of up to 42,000 sq m of commercial floorspace.

The Airfield is owned by Epping Forest District Council. It is currently used for historic and general aviation activities. Between 60% and 70% of airfield activity is at the weekend. Other commercial activities take place at the Airfield including a large weekend market, freight distribution, transport, logistics, driver training, and car driving experiences. The market provides the largest source of income to the Council, but it has been declining in recent years.

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<sup>18</sup> Allies & Morrison (February 2014) North Weald Bassett: Stage 1 Draft Report

The Allies & Morrison report (Part 1, p.53), considers potential property development in North Weald Bassett, including the Airfield. This is summarised in the table below.

Activity	Allies & Morrison Commentary
Residential	Potential for development
Offices	Limited potential, but the site could accommodate a business park, and provide Grade A office space, for which there is demand
Industrial	Proximity to M11 and M25 would make this a good location for distribution and logistics. The site could also accommodate high quality industrial space, which it suggests is in short supply
Retail	The scale of the proposed development would support a supermarket
Education	The local primary school may need expansion to accommodate many more homes
Glasshouses	The site could accommodate glasshouse developments, but lower land values are likely to make this unattractive
Leisure	A new leisure centre could be accommodated, possibly as a replacement for the existing centre at Epping

The report states that residential development will be the main value driver at North Weald Bassett and Airfield.

It is acknowledged that transport improvements will be needed to support development at North Weald Bassett and Airfield, and that a new junction (7a) on the M11 will free up capacity at the current Junction 7. Opening the Epping-Ongar railway line for mainline services, and the provision of a park-and-ride facility at North Weald Airfield are considered in the report.

One of the aims established for the future development of North Weald Bassett and Airfield is to strengthen commercial and aviation activities in the area, and provide employment opportunities. The development principles set out in the Allies & Morrison Stage 2 report<sup>19</sup> suggest that the operation of the Airfield for flying will continue. The report states that some 30 hectares of land could be released for development uses. Any development needs to allow the ongoing operation of the Airfield. The growth scenarios set out in the Stage 2 report suggest that development will take place to the east of the existing runway. None of the options presented in the report sets out the likely scale of employment development. The report implies that just under 43 hectares of mixed-use development could take place at North Weald Bassett and Airfield.

### 7.2.1 Consultation messages on North Weald Bassett and Airfield

- Deloitte study – considered three options for future development. Preferred option: maintain airfield, and some mixed-use development
- Airfield - currently private/general use, not commercial use. No aspiration to change this
- Future of the airfield is in private/general aviation, not commercial aviation. Airfield is not registered with the CAA, and the cost of achieving registration would be very significant
- Masterplan for mixed-use development. Will include some employment land, but must be compatible with residential

<sup>19</sup> Allies & Morrison (April 2014) North Weald Bassett: Stage 2 Draft Report

- EFDC owns airfield, hence potential to gain receipts from sale/development
- Currently a large Saturday market, but this is declining in size, and therefore income to EFDC
- EEDA wanted to promote significant housing development on the site.
- Saturday market, which generates most of the income from the airfield, is shrinking.
- Runway needs upgrading. Will need to invest £millions in the runway. Will need land receipts to be able to do this.
- Currently looking for an operator for the airfield
- Want to get the airfield licenced by the CAA.
- Potential for new separate access into the airfield. Highways consultant has been commissioned to investigate this
- Allies Morrison masterplan for North Weald Bassett and Airfield – mostly residential development, with some commercial development

## 7.3 Debden

### 7.3.1 Debden Broadway

A development options study was undertaken in 2008 for Debden centre and Broadway<sup>20</sup>. This looks at improving the quality of an existing retail area. This could create additional employment in retail and leisure outlets. A new transport interchange at Debden Station is also included in this proposal.

The study suggests that offices could form part of the development in this area.

### 7.3.2 Langston Road

Consultation messages on Langston Road:

- Langston Road – Clinton Cards former HQ being sold. Potential for a data centre – unlikely to create many employment opportunities. However, will require major broadband capacity, and is there potential for other businesses to tap into this?
- Former Bank of England sports ground – has development potential

## 7.4 Waltham Abbey

In 2015, PBA prepared a town centre framework for Waltham Abbey<sup>21</sup>. This set out six economic priorities for Waltham Abbey:

- Working in partnership with businesses, local organisations and other public sector stakeholders
- Marketing and promotion of the centre
- Exploring tourism potential
- Improving retail, entertainment and leisure
- Maximising the contribution from employment and businesses
- Further work on transport and infrastructure

A number of opportunities for change were identified within the centre:

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<sup>20</sup> Urban Practitioners, Colin Buchanan and CBRE (2008) Debden Town Centre and Broadway Development Options: Final Report

<sup>21</sup> Peter Brett Associates (Jan 2015) Waltham Abbey Town Centre Strategy Framework: Draft for Discussion

- Development of the Market Square, possibly as a food and beverage quarter
- Creating a pedestrian and bus link from Tesco to the town centre
- Revitalising the police station, museum and library area

Some secondary and tourism opportunities were also discussed.

Also in January 2015, Colliers prepared a town centre report from Waltham Abbey<sup>22</sup>. This included a review of the centre and a SWOT analysis. This report suggested:

- Larger retail units are needed to attract national retailers
- There should not be further office development in Waltham Abbey centre
- There is demand for, but limited availability of, residential units in the centre

The study made a number of recommendations, including:

- Improving signage and way-finding, removing clutter, improving refuse facilities and introducing pop-up retail units
- Creating a single transport node
- Relocating existing retailers to form a cluster of retail
- Enhancing the garden entrances and water features
- Improving public realm in key areas, introducing a statue of King Harold, and creating a mosaic trail
- Creating a one-way traffic system
- Pursuing development opportunities on a number of identified sites

## 7.5 Epping

A development brief has been prepared for the St John's Road site in the centre of Epping<sup>23</sup>. Four options for the development of the site, with a range of different mixes of use have been considered. Retail and leisure appear to be the most significant sources of employment (other than in the construction of any new development), although there are some small office proposals included in some of the options, and community facilities may create a small number of jobs. Although a supermarket has been considered, it is unlikely that this will be acceptable.

Leisure uses may include a sports and leisure facility, or commercial leisure facility such as a cinema. Retail facilities could include food and drink outlets. Offices could be provided on the upper floors of any developments. A hotel could form part of the development.

## 7.6 Green Belt

Consultation messages on Green Belt:

- Want to maintain strategic GB gaps between settlements
- GB is a constraint on development in EFD
- Potential for intensification of use of employment sites in rural areas

<sup>22</sup> Colliers International (Jan 2015) Waltham Abbey Town Centre Report

<sup>23</sup> Allies & Morrison (2012) St John's Road Epping: Design and Development Brief, Draft Report



## 7.7 Town centres

### 7.7.1 Consultation messages on town centres

- ED team may commission update to town centres study
- General concern about the health of Waltham Abbey centre. Potential to develop the heritage draw of the town, and focus on leisure development
- Waltham Abbey is the biggest area of need in EFD
- Sainsbury's distribution centre has been successful. Interest from another major occupier (DHL) in a site close to M25 J26
- Some office-based employment in Loughton and Epping, but not a lot
- Debden- Higgins and Kier located here. Proposal for development adjacent to the tube station – including retail development
- Ongar – interested in more tourism. Relates more to Chelmsford and Brentwood than EFD
- Potential for commuter train services to be introduced along current Ongar-Epping heritage railway line, but no serious plans in place
- Loughton High Road retail offer is becoming very homogenised. High turnover of shops
- LSP/Chamber of Commerce would like a media/creative/arts/music hub in Epping. Part community facility, part enterprise/workshop facility
- Lots of small businesses that start in EFD, then grow and have to leave the District because of insufficient grow-on space
- St Johns, Epping. Former school site. Owner by ECC and EFDC. Protests against supermarket development on site. Potential for an arts/community centre
- Few empty shops
- Waltham Abbey – worst town centre, but not very bad. Tesco and Lidl have drawn spend out of the centre. Awarded £10,000 for improvements
- Waltham Abbey is the next priority for EFDC investment. Links to Waltham Cross in Broxborne. Potential for larger scale investment
- Ongar – limited parking. Could be linked to Epping using Epping & Ongar railway for commuter as well as heritage rail
- Town centres becoming more about social space e.g. coffee shops, restaurants
- Vibrant night-time economy in e.g. Epping
- Role for town centre partnerships

## 7.8 Workforce and skills

Prosperica (2014) claims that wages are above the national average, but conversely qualifications are below the national average - certainly for *high* and *middle level* qualifications (p.5).

## 7.9 Phoenix Chinese Business Cluster

Consultation messages on Phoenix Chinese business cluster:

- Essex CC has spent a long time developing relationships with China – led to Phoenix investment in EFD
- Touchdown and hotel accommodation for Chinese business visitors to Essex/East of England/UK. All businesses, not just Phoenix
- Potential for a Chinese business cluster in the local area

- Phoenix Print and Media International (PPMI). Part of Phoenix Group – Chinese publishing group
- Taken over former Travelodge and Little Chef. Now a hotel and Chinese restaurant
- Buying an office building in Greenwich
- Have a small print works in Basildon that they want to relocate to North Weald
- Planning a Chinese trade exhibition in Chelmsford
- Not sure what the potential of this link is

## 7.10 Care homes

Consultation messages on care homes:

- High dependency and less high dependency care homes
- Lots of US care home operators interested in Essex and EFD
- Potential for care villages
- Creates a range of jobs – some high skilled and some less skilled – opportunities for local residents
- Two major projects looking for sites in EFD. prospective sites are greenfield, and probably not currently allocated
- High quality retirement village, with a focus on dementia care
- Relatively low intensity development. Six acre site, 35% coverage, could create 450 jobs
- May include facilities (e.g. swimming pool) that can be used by the local communities