

Key Decision Required:	No	In the Forward Plan:	No
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CABINET

9 MARCH 2011

REPORT OF HEAD OF REGENERATION AND COMMUNITY SERVICES

A.7 ESSEX INTERGRATED COUNTY STRATEGY

(Report prepared by Mike Bateson)

PART 1 – KEY INFORMATION

PURPOSE OF THE REPORT
To formally endorse the Essex Integrated County Strategy (ICS).

EXECUTIVE SUMMARY
<p>The ICS provides a shared and agreed vision for Greater Essex (Essex Local Authority areas including Southend and Thurrock unitary authorities, to identify the real priorities and outcomes needed to achieve increased economic growth. By producing the ICS, Greater Essex is taking a clear lead in responding to the current economic climate. When there is limited money available it is essential that investment is effectively prioritised. The ICS will ensure that any funding available to Essex is invested in projects and priorities which are most likely to generate long-term economic growth. In Tendring’s case this will include the potential for Harwich to become a major windport.</p> <p>The ICS has been produced on behalf of the Essex Chief Executives Association with support from all 15 county, unitary and district authorities of Greater Essex. It has evolved from the Regional Spatial Strategy and the collective view in Essex was around three strategic priorities: the Thames Gateway South Essex; key towns and low carbon energy.</p> <p>The ICS and the newly formed Local Enterprise Partnership priorities will be delivered through the four greater Essex sub-regions; West Essex; Heart of Essex; Haven Gateway and Thames Gateway South Essex. The final version of the strategy had been completed and all Essex local authorities have been requested to formally endorse the document.</p> <p>At a local level there will continue to be close joint activity and focus between Tendring and Essex CC on specific issues through the Coastal Renaissance Partnership Board. This includes the Crag Walk, the Harwich wind port promotion and addressing the high levels of deprivation in Jaywick.</p>

RECOMMENDATION(S)
That Cabinet formally endorses the attached Integrated County Strategy.

PART 2 – IMPLICATIONS OF THE DECISION

DELIVERING PRIORITIES

Priority actions include identified in the Strategy address the key aim as set out in the Council's Corporate Plan and Regeneration Strategy.

FINANCE, OTHER RESOURCES AND RISK

Finance and other resources

There are no financial obligations in the Council endorsing the Strategy.

Risks

None identified

LEGAL

The proposed action is within the Council's legal powers.

OTHER IMPLICATIONS

Consideration has been given to the implications of the proposed decision in respect of the following and any significant issues are set out below.

Crime and Disorder / Equality and Diversity / Health Inequalities / Area or Ward affected / Consultation/Public Engagement.

None.

PART 3 – SUPPORTING INFORMATION

BACKGROUND

Essex is taking a clear lead in responding the changing global economy. The ICS provides a vision for Greater Essex, identifying the investment needed to maximise economic growth, and directing investment to projects that will underpin the future economic stability of UK plc.

The Strategy is supported by a fully researched evidence base and consolidates of the opportunities and issues that need to be addressed to enable Essex to contribute fully to the wider economy.

The strategic focus of the document is:-

- Thames Gateway South Essex
- Key Towns
- Low Carbon energy

Under each of the Strategy focuses there are identified themes and priority actions (see page 41 of the appendix). Priority actions include:-

- Support the development and improvement of the Haven ports (which includes Harwich)
- Support the promotion and location of wind port and related industries focused on Harwich and Essex University
- Addressing the issues facing Jaywick

BACKGROUND PAPERS FOR THE DECISION

None

APPENDICES

Integrated County Strategy

The Greater Essex

Integrated County Strategy



December 2010

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ACRONYM GLOSSARY

BIS	The Department for Business, Environment, and Skills
BBCT	Bathside Bay Container Terminal
DHS	Decent Homes Standard
ECEA	Essex Chief Executives Association
GVA	Gross Value Added
HCA	Homes and Communities Agency
ICS	Integrated County Strategy
ICT	Information and Communications Technology
LDF	Local Development Framework
LEA	Local Economic Assessment
LIP	Local Investment Plan
LTP	Local Transport Plan
NEETS	Not in Employment, Education, or Training
NVQ	National Vocational Qualification
PPS	Planning Policy Statement
RGF	Regional Growth Fund
SME	Small and Medium Sized Enterprises
SWOT	Strength, Weaknesses, Opportunities, and Threats
TEN	Trans-European Network
TIF	Tax Increment Financing
TGSE	Thames Gateway South Essex

EXECUTIVE SUMMARY

Greater Essex is a thriving and prosperous area, home to over 1.6 million people, nearly 70,000 businesses, and over 600,000 jobs. Located adjacent to the world city of London, and with key commercial gateways to Europe and the World, there is a unique collection of assets in Greater Essex which help to power the engine of national economic growth.

Greater Essex has many strengths that have allowed the area to develop a strong economy. However the area is not performing to the economic potential that its strength could bestow. Our ambition for Greater Essex is to create a highly performing and competitive economy that makes a significant contribution to UK economic growth and recovery, provides for the successful regeneration of Greater Essex communities, and provides a high quality of life for our residents.

The ICS recognises that reduced finances will make achieving economic growth more difficult to achieve. A clear statement is required to identify what are the issues of highest importance in Greater Essex, what tasks could be most influential, and what issues can be targeted to provide the greatest overall benefit.

Greater Essex is taking a clear lead in responding the changing global economy. The Integrated County Strategy (ICS) provides a vision for Greater Essex, identifying the investment needed to maximise economic growth, and directing investment to projects that will underpin the future economic stability of UK plc.

The ICS provides the connection between national and local policy, identifies strength and potential, and considers how we can use our key assets to improve the area for residents and make Greater Essex an even more attractive location for

businesses. Moreover, within the context of public spending cuts and reduced public intervention, the ICS aims to identify the key strategic projects which will provide the maximum return on investment and greatest benefits.

The ICS has been produced on behalf of the Essex Chief Executives Association with agreement from all 15 county, unitary and district authorities of Greater Essex. The collaborative and rigorous process of research, consultation, and testing of issues and opportunities described in this document has identified a tripartite focus that, if adhered to, will most effectively provide economic growth in Greater Essex.

The strategic focus for Greater Essex developed in the ICS includes the following features;

Thames Gateway South Essex (TGSE)

Achieve transformational development and change throughout TGSE to significantly improve the local economy, quality of life of residents, and natural and built environment

Key Towns

Promote opportunities for economic growth, redevelopment, and regeneration in the key urban centres of Southend, Thurrock, Basildon, Harlow, Chelmsford, and Colchester

Low Carbon Energy

Support the growth of renewable and low carbon energy as a key sector and promote the growth and location of associated industries in Greater Essex

1. INTRODUCTION

1.1 Purpose and aim of the Integrated County Strategy

The Integrated County Strategy (ICS) provides a shared and agreed vision for Greater Essex¹, to identify the real priorities and outcomes needed to achieve increased economic growth. By producing the ICS, Greater Essex is taking a clear lead in responding to the current economic climate. When there is limited money available it is essential that investment is effectively prioritised. The ICS will ensure that any funding available to Essex is invested in projects and priorities which are most likely to generate long-term economic growth.

To be able to identify how funding in Greater Essex could generate maximum economic growth, research has been undertaken to identify;

1. the issues of highest importance
2. the interventions which would produce the greatest benefits

The aim of the ICS is to develop a collection of priorities that is agreed by all partners, and closely relates to the key strengths and weakness of Greater Essex which can direct investment to achieve the greatest benefits for the area. This document will outline how the ICS priorities were developed.

1.2 The structure of the ICS

Section 2 provides a brief overview of the approach taken to produce the ICS priority list, including the approach to

research, partnership engagement and consultation. Sections 3, 4 and 5 then provide a brief overview of the evidence base and analysis stages that directly informed the production of the ICS priority list.

To assist in identifying the key strengths and weaknesses of Greater Essex, section 3 introduces the current state of the area and the sub-regions. The changes required to improve Greater Essex and address some of the issues raised in the previous section are considered in section 4, outlining a vision for Greater Essex and each sub-region.

Section 5 uses four key drivers of change, identified during evidence gathering and consultation workshops, as a basis for analysis to assist in developing a set of priority themes related to the 16 priority investments.

Section 6 explains the methodology used to develop the ICS priority list, describing how the suggested priorities were assessed for inclusion in the final list, and how consultation with partners and the evaluation of the evidence base helped to inform the selection of priorities. The ICS priority list is then provided in section 7.

The key overarching priorities that provide 'our strategic focus' for the ICS are introduced in section 8, explaining how the strategic focus can guide the delivery of the priority themes and investments. Finally the document concludes by outlining future plans for the ICS to consider the resourcing and delivery of the ICS priorities.

¹ Greater Essex includes the 12 local authorities of Basildon, Braintree, Brentwood, Castle Point, Chelmsford, Colchester, Epping Forest, Harlow, Maldon, Rochford, Tendring, and Uttlesford, located within the area of Essex County Council; and the two unitary authorities of Southend-on-Sea and Thurrock.

2. OUR APPROACH

2.1 The ICS working group

In February 2010 the Essex Chief Executives Association² (ECEA) decided to develop an Integrated County Strategy. The ECEA Economic and Housing Issues Sub Group became the steering group through which the ICS was taken forward, and directed work produced by the 'ICS working group', a small group of officers from each of Essex sub-regions and Essex County Council.

2.2 The evidence base³

Initial research was undertaken to identify the key issues in Essex in relation to the economy, housing, transport, and the environment. The evidence base for this work used a range of existing sources from Local Development Frameworks (LDFs) across Essex, a desktop analysis of available data, and the 'Strategic Countywide Economic and Housing Issues' paper (August, 2009) produced by the ECEA. The collection of evidence for the ICS was also closely aligned with the production of a the following emerging documents;

- Essex Economic Assessment –The Local Economic Assessment (LEA) for Essex provides the economic evidence base for prioritisation in the ICS. The assessment sets out Essex's economy in its wider

context such as housing, environment and transport and seeks to understand the dynamics of the Essex economy and its strengths and weaknesses. There is a statutory duty to produce the LEA. The ICS provides a route to deliver outcomes from its assessment.

- Local Transport Plans – Essex County Council, Thurrock Council and Southend on Sea Borough Council are all developing their 3rd local transport plans (LTPs). The ICS is the primary source identifying the high level framework across Greater Essex. The local transport plan will take these high level outcomes and priorities and identify the specific transport projects that will help to deliver them across Greater Essex.
- Local Investment Plans – All local authorities in Greater Essex have been developing a Local Investment Plan (LIP). LIPs are an outcome of the 'Single Conversation' process initiated by the Homes and Communities Agency (HCA) in 2009. They set out priorities for investment to achieve economic growth and sustainable communities within the local area. LIP's priorities with a strategic Essex wide impact have been considered in the ICS.
- The Employability and Skills Strategy – Developed by Essex County Council, the strategy provides a robust evidence base to inform local actions on employability and skills. It outlines a clear vision for locating local businesses at the heart of skills development – linking skills provision to real employment opportunities in key industries and employment sectors.

² *The Essex Chief Executives Association (ECEA) includes one officer representative from each of the 2 unitary authorities, 12 local authorities, and county council that make up Greater Essex. The association meets on a monthly basis to discuss current and topical issues, and provides a good location to consider matters of strategic importance for the area.*

³ *All evidence base documents used in the preparation of the ICS are available in the ICS section of the Essex County Council website, at: www.essex.gov.uk*

- ICS sustainability report – Due to the influential nature of priorities that could be developed through the ICS, it was considered appropriate to produce a ‘Sustainability Report’ to provide a form of Sustainability Appraisal or Strategic Environmental Assessment. The ‘Sustainability Report’ has therefore been produced alongside the ICS to influence and shape the development of the final priorities. The report takes a pragmatic approach and applies the principles of the sustainability to the desired outcomes of the ICS, to ensure that sustainability is considered throughout the process.



2.3 Partnership engagement and consultation

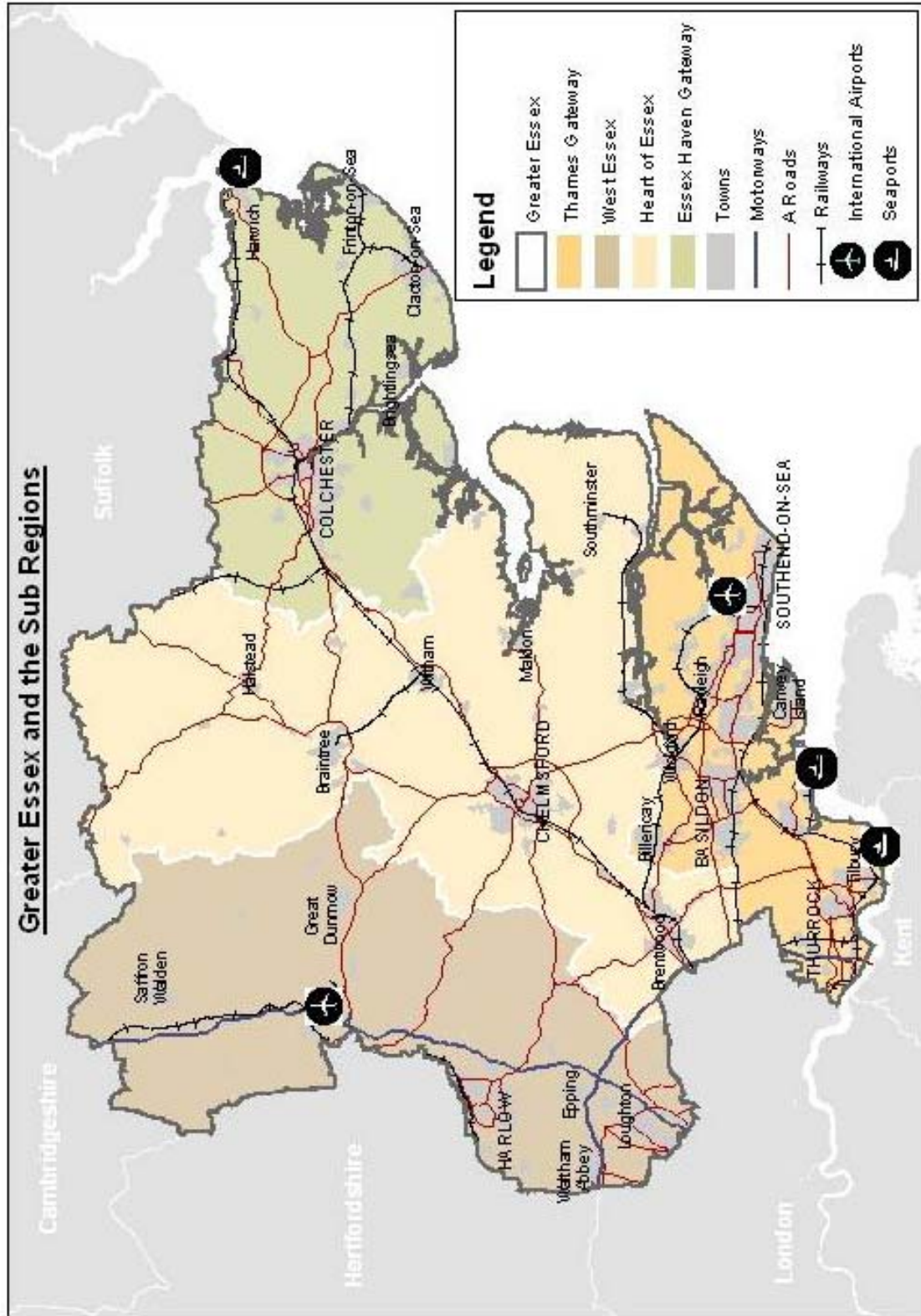
Three workshops were conducted between February and July 2010, and attended by chief executives, economic development and regeneration officers, and planning and transport officers from all 15 county, unitary, and district authorities in Greater Essex. The workshops were organised by Essex County Council (ECC) to debate issues in Greater Essex, present initial findings from the evidence base work, and to begin to develop some priorities for the future of the area.

The collection of evidence identified many priorities within existing documents that could be relevant to the ICS. This information was included with priorities identified in the ECEA Strategic Countywide Economic and Housing Issues document, and priorities identified by participants at the workshops, to create a table that identified around 400 priorities for Greater Essex.

The methodology in section 6 explains the assessment process used to analyse the priorities. The next section outlines the some of findings of the evidence gathering process, showing how an analysis of the current state of Greater Essex helped to inform the development of the ICS priorities.



Diagram 1: Map of Greater Essex and the sub-regions



3. INTRODUCING GREATER ESSEX AND ITS SUB-REGIONS

To consider what issues may be of highest importance in Greater Essex, it is important to have a clear view of the context of the area. To begin to consider various interventions which could produce the greatest benefit for the area, it is also important to identify existing strengths and weaknesses, and acknowledge the effect that certain issues will have on different parts of Greater Essex. The first stage of the ICS involved evidence gathering to identify the current state of Greater Essex. The following section outlines the findings of this first stage, and helps to guide the development of a future vision for Greater Essex in the next section.

3.1 Greater Essex, Broad Context and Definition

Greater Essex is the extensive geographic area which is being considered in this Integrated County Strategy. The area comprises the combined administrative areas of Essex County Council (with its twelve separate district and borough councils), Southend on Sea Borough Council, and Thurrock Council.

There are very strong functional economic relationships between Essex, Southend and Thurrock including through the growth and regeneration objectives for Thames Gateway.

Greater Essex is situated on the north-east edge of London, bordered to the east by the North Sea, and on the south by the River Thames estuary. Its northern border is formed for much of its length by the River Stour. Likewise, its western boundary is defined for much of its length by the River Lee valley which extends into north London.

The area has an excellent strategic location in the prosperous southern part of the UK with access to large domestic

markets, it is very near to the world city functions of London which operate on a global scale, and it has excellent transport connections to the rest of mainland Europe which is a relatively short distance away. The northern part of Essex is also close to the world leading academic, research and development, and life sciences cluster situated in the Cambridge area.

Greater Essex is well connected to these key economic markets by road and rail, with the M25, M11, A12, A127, and A13 providing the main road arteries. These road corridors, other than the orbital M25 motorway, are also matched by major rail lines providing for passengers and freight.

The southern part of Greater Essex is more heavily urbanised with a complex pattern of towns stretching from Thurrock in the west through to Southend in the east. Overall, this compact area accommodates over 660,000 residents with the main urban centres being Basildon, Southend, and Grays Thurrock. This area is also notable for its large economic base and strong focus on port and logistics activities.

Further north in Greater Essex there is a well scattered pattern of small regional cities which are widely separated by extensive rural areas containing smaller towns and villages. These regional cities are Chelmsford and Colchester both located on the A12/Great Eastern rail corridor with over 100,000 residents each; and Harlow located on the M11/West Anglia rail corridor with about 80,000 residents, but identified for major growth. Stansted Airport is situated in a mainly rural location on the M11 motorway and is the UK and London's third largest airport for passengers and freight. It is a key economic driver in north Essex.

Parts of north-east Essex including Colchester and Tendring are contained within the Haven Gateway area, which

along with parts of neighbouring Suffolk, are associated with significant growth, major ports and logistics activities, information and communications technology (ICT) and research & development activities in the Gateway area.

In Greater Essex, the future pattern of strategic growth up to 2031 in the form of new housing, jobs growth, and increased economic activity will mostly be focussed on the main urban centres namely Basildon, Southend and Thurrock (in Essex Thames Gateway), Chelmsford, Colchester, and Harlow. These have been described as the 'key centres' for accommodating future growth.

These key centres will be the main drivers of future economic growth. They will provide a focus for employment, retailing and other commercial activities, education, health care, administration, culture and tourism. They also provide good access to public transport facilities and services for both urban and inter-urban travel. Other more limited growth will be focussed on the pattern of market towns and coastal towns within the area.

Overall, the combined area of Greater Essex is very significant in terms of its contribution towards the UK economy. It has a resident population of over 1.7 million people. In 2007/08 before the start of the latest recession, it provided over 640,000 jobs, had nearly 70,000 businesses, and generated a GVA (Gross Value Added) of over £28 billion. Its economy is much larger than the nearby counties of Hertfordshire, Cambridgeshire, Suffolk, and Norfolk (measured in terms of GVA).

The overall scale of the Greater Essex economy when measured in terms of its GVA (workplace based) is greater than several northern city regions – Tyne & Wear (Gateshead, Newcastle, North & South Tyneside, Sunderland); Tees Valley (Hartlepool, Middlesborough, Redcar &



Cleveland, Stockton-on-Tees, Darlington); Hull & Humber Ports; Sheffield city region (Sheffield, Doncaster, Rotherham, Barnsley, Chesterfield); and Central Lancashire (Blackburn, Blackpool, Burnley, Chorley, Preston).

Compared to these city regions, Greater Essex also has a much higher proportion of knowledge driven employment and a lower proportion of employment in the public sector.

3.2 Comparative Advantages

A considerable evidence base has been used to prepare this Integrated County Strategy document. The desktop research, discussion workshops, and related preparation of the Local Transport Plans and Essex Economic Assessment, all point towards provisional conclusions about 'the state of Greater Essex' and the future challenges ahead.

The swot analysis⁴ presented in the diagram on the following page provides a very abbreviated summary of many of the findings. This diagram is not intended to be fully exhaustive, but is broadly illustrative of many of the findings.

⁴ A comparative analysis of strengths, weaknesses, opportunities and threats based on the available evidence

Diagram 2: Greater Essex SWOT analysis

STRENGTHS:	OPPORTUNITIES:
<ul style="list-style-type: none"> ▪ Excellent European and UK location for business ▪ Proximity to London and strong relationship with the capital ▪ Presence of multi-national and leading edge companies ▪ Reputation for business start-ups and entrepreneurship ▪ Existing base in the knowledge economy ▪ World class airports, ports and logistics ▪ Good access to higher education facilities ▪ Regional cities, regional town centres, and Lakeside ▪ Strong agricultural economy supporting related businesses ▪ High quality natural environment 	<ul style="list-style-type: none"> ▪ London 2012 Olympics legacy and business related opportunities ▪ Economic and employment growth within London ▪ Completion of Crossrail project will improve business location and travel options ▪ Low carbon agenda including environmental goods/services, off-shore renewables, and nuclear power ▪ Business growth through major port expansion at London Gateway and Bathside Bay ▪ Major regeneration of existing towns and town centres ▪ Major remodelling of Thurrock Lakeside Basin ▪ Business growth stimulated by airport operations at Stansted and Southend ▪ Growth of tourism and leisure sectors
WEAKNESSES:	THREATS:
<ul style="list-style-type: none"> ▪ Poor skills levels at Levels II, III and IV compared to national and regional averages ▪ Increasing number of young people who are economically inactive ▪ Low proportion of Essex businesses who trade internationally ▪ Shortage of trained staff to service the expanding logistics sector ▪ High house prices and problems of housing affordability ▪ Access to broadband, telephony, and services in rural areas needs to be improved ▪ Strategic road and rail infrastructure needs enhancement ▪ Rail service needs improvement in terms of quality, service pattern, and travel time ▪ Heavily car dominated culture for travel ▪ Major regeneration required in specific towns and town centres 	<ul style="list-style-type: none"> ▪ Public sector funding cuts with implications for public services, jobs, infrastructure delivery etc ▪ Vulnerability of the financial services sector to global events ▪ Rapid house building unsupported by job growth or infrastructure ▪ Climate change adaptation requirements ▪ Global energy markets and food security

Arising from this, the main comparative advantages of Greater Essex can be summarised below;

Key Strengths:

- Excellent UK Location – located close to London and major markets in the prosperous South East and East of the UK; as well as to the European mainland through its ports, airports, road and rail connections. Well connected to the UK transport system
- Proximity to London and strong relationship with the capital – well placed to take advantage of London's world city functions and able to play a significant role in supporting London's economy including through commuting benefits
- Presence of multi-national and leading edge companies – including Glaxo Smith Kline, Ford Motor Company, and many others
- Business entrepreneurship – A high rate of new business start-ups and the development of small and medium sized enterprises (SME's)
- Knowledge economy – within the top 20 areas in Great Britain for proportion of jobs in high-tech-industries; and 6th highest share in the nation of knowledge driven production employment
- World class logistics – international ports at Tilbury and Harwich, the UK's third airport at Stansted, and key clusters of logistics activity
- Higher education – the University of Essex (Colchester) is one of the UK's leading universities; and supported by Anglia Ruskin University and Writtle College also. There is also ready access to leading universities and research & development activities in nearby Cambridge and London

Key Opportunities:

- London 2012 Olympics – taking advantage of the business opportunities arising and the legacy arrangements
- Employment & economic growth in London – opportunities arising from business supply linkages and job opportunities provided by the capital for Greater Essex residents
- Crossrail project – this will improve access into the capital for Essex businesses and residents when completed
- Low carbon agenda – opportunities in the production of environmental goods and services. At the centre of the world's largest market for off-shore wind energy. Prospective new nuclear power station at Bradwell
- Major port expansion – the construction of a major container port at London Gateway supported by one of the largest new business parks in Europe; and a new container terminal at Bathside Bay, Harwich
- Regeneration – major opportunities in Lakeside Basin, in key town centres, and in existing towns
- Airports – further expansion of both Stansted and Southend airports leading to the stimulation of business activity

3.3 Greater Essex: The Sub-Regions

Although Greater Essex can be defined as a functional economic area in its own right⁵, it is not a homogeneous area and has large variations between its different sub-regions. These variations reflect the differing influence of London, the settlement pattern, different local economies and relationships, and the pattern of strategic transport infrastructure. Therefore, it is also necessary and useful to express the Integrated County Strategy in terms of four separate sub-regions which each have their own strong identity and political recognition.

Greater Essex has four well established sub-regions which are each described in turn below.

3.3.1 Thames Gateway South Essex

This sub-region is situated within the Essex districts of Basildon, Castle Point, and Rochford; and the two unitary authorities of Southend on Sea and Thurrock which border the Thames estuary. It forms part of the wider Thames Gateway which extends into east London and north Kent, and which represents Europe's largest regeneration programme. This is a UK national and regional priority area for regeneration and growth due to the transformative impact that an improved local economy could have on the economic performance of UK plc.

Thames Gateway South Essex broadly covers an area to the south of the A13 route in Thurrock and the A127 route crossing Basildon, Castle Point, and Southend. Its built-up areas extend from Purfleet in the west across to Southend in

the east. The majority of Rochford district is excluded from the Gateway area except for the London Southend Airport area which immediately abuts the built-up area of Southend.

The neighbouring parts of Rochford district and the northern parts of Basildon district and Thurrock borough are of a different character and are not included within the Gateway regeneration area. They have a green belt role and any further development within them is being directed to the main towns.

Future growth and regeneration in Thames Gateway South Essex up to 2031 is being focussed mainly on the three major urban centres of Thurrock, Basildon new town, and Southend. Whilst Castle Point does not contain any settlements of comparable size, it does nevertheless include centres at South Benfleet and Canvey Island that have specific challenges and potential to contribute to regeneration.

The sub-region has a significant economic base which includes manufacturing, offices, retailing and other commercial activities, port and transport activities, education, health care, administration, culture and tourism. Nevertheless, there are far more resident workers than local jobs, and there is substantial daily commuting into Greater London for employment. The sub-region is strongly related to the London labour market and parts of the area function as residential dormitory areas. Overlain upon this London sphere of influence is a complex pattern of internal commuting within the sub-region, mainly to the three main employment centres and between districts.

A significant feature of the sub-regional economy is the concentration of port infrastructure and logistics activities mainly located in the Thurrock area. This represents one of the largest concentrations in Europe and the UK. It

⁵ See for example, *Thriving Local Communities: Mapping Sub-Regions, Local Government Association and PACEC, January 2007, which looked at labour markets, migration and housing markets, and self-containment for the provision of goods and services.*

includes the Port of London activities centred on Tilbury and the Thameside wharfage facilities, and the London Gateway proposal at Shellhaven to provide one of the UK's largest container ports.

3.3.2 Heart of Essex

This sub-region is situated at the centre of Essex comprising the four districts of Braintree, Brentwood, Chelmsford, and Maldon. They all share a number of common characteristics.

The A12 route and Great Eastern rail services, and connecting roads and branch lines, provide the sub-region with shared lines of strategic communications. Also, Chelmsford is a dominant regional centre serving the whole of this sub-region and providing it with a higher order range of employment opportunities, retailing, cultural and leisure activities.

Chelmsford functions as a county town (for a wide range of key civic, administrative, legal and diocesan functions), as a major centre for higher education and secondary education (with Anglia Ruskin University, Writtle College, and top performing state schools), and as a regional transport node for linking together public transport services.

The town of Chelmsford is linked functionally to, and surrounded by, a pattern of attractive market towns in neighbouring districts including Brentwood, Maldon, Braintree, Witham, and Halstead. There is significant daily commuting into Chelmsford from these neighbouring districts for employment.

All of the sub-region is situated within the London commuter belt and so has strong links with the capital's employment market, although the scale of out-commuting declines steadily with distance from London. Most of the sub-region has important economic linkages with London, except for Maldon and the

northern part of Braintree district. However, it is far less reliant on London commuting as compared to Thames Gateway South Essex.

Chelmsford has been identified as a regional growth point, and the majority of future growth and development in the Heart of Essex will be focussed on the town of Chelmsford as a leading regional city. There will also be strategic growth at both Braintree and Witham albeit on a much smaller scale, and the triangle of growth based around the three towns, will be an important characteristic of the sub-regional growth pattern into the future. Elsewhere the growth levels in other parts of the sub-region will be more limited including at Brentwood, Maldon, Halstead, and other settlements.

3.3.3 West Essex

This sub-region is situated on the western side of Essex comprising the three districts of Epping Forest, Harlow, and Uttlesford. It shares common lines of strategic communication namely the M11 motorway and West Anglia rail corridors. Although most of the sub-region comprises small towns and villages set within extensive areas of countryside, it has two major economic drivers of regional importance located at Harlow and Stansted Airport.

Harlow is the largest urban centre in the sub-region with about 80,000 residents and with an important economic base. It was a former new town and developed rapidly between the 1950's and 1980's. The strategy for Harlow is to promote the fundamental renaissance of the new town through developing its role as a housing growth point, major town centre, and strategic employment location. This will be achieved by major regeneration and redevelopment of the town centre and other existing areas of the town, and supported by new urban extensions on the edge of the town and transport measures.

Stansted Airport is an important component of the Essex economy and a major employment hub. It is the third largest airport in the UK for both passengers and freight, but the nature of its services centred upon providing low cost flights to the UK and Europe, essentially means that its economic impact is less than a similar sized airport not based on low cost carriers. The airport currently employs 10,900 workers almost a quarter of whom (24%) live locally in Uttlesford district. Essex provides about 59% of the airport's employees.

The Airport had a throughput of 19.7 million passengers per annum in 2009, having peaked at 23.5m in 2007 before the start of the recession. Planning approval has been given to enable the airport terminal building to handle up to 35m. per annum using the airport's single existing runway. A planning application for major expansion of the airport through the construction of a second runway was recently withdrawn. This followed an announcement by the Coalition Government that a second runway proposal would not be approved.

Elsewhere in the sub-region there is a scattered pattern of smaller towns and villages which will receive limited growth. Green belt policy is a significant constraint in the southern part of the sub-region. The sub-region is generally influenced by the London labour market, and some of its local communities closer to London have a very strong commuting relationship with the capital. The London 2012 Olympic and Para-Olympic events will be focussed on areas of north London which are very close to the sub-region. The legacy arrangements and economic development opportunities arising from this will be important factors for the sub-region to consider.

3.3.4 Haven Gateway

The Haven Gateway sub-region straddles parts of north-east Essex and south-east Suffolk. The Essex part consists of Colchester borough and neighbouring Tendring district; and the Suffolk part comprises Ipswich borough and the neighbouring parts of Babergh, Mid-Suffolk, and Suffolk Coastal districts.

The sub-region is one of the key international gateways to the UK containing the internationally significant Haven Ports. The Gateway initiative is being focussed upon the growth prospects arising at the two regional cities of Colchester and Ipswich, the major international ports at Felixstowe and Harwich, and the main coastal towns such as Clacton, Harwich, and Felixstowe. The sub-region has substantial potential to develop further as a major focus for economic development and growth.

In the Essex part of the Gateway area, Colchester is the dominant economic driver with the local economies of Colchester and Tendring being strongly inter-connected. Colchester intends to become a leading and prestigious regional city reflecting its significant opportunities and potential. It is a regional centre for employment, retailing and other commercial activities, higher education (including the University of Essex campus), health care, and has one of the most important army garrisons in the UK. It is also a key urban centre for tourism and culture, and a regional transport node for linking together urban and inter-urban public transport services.

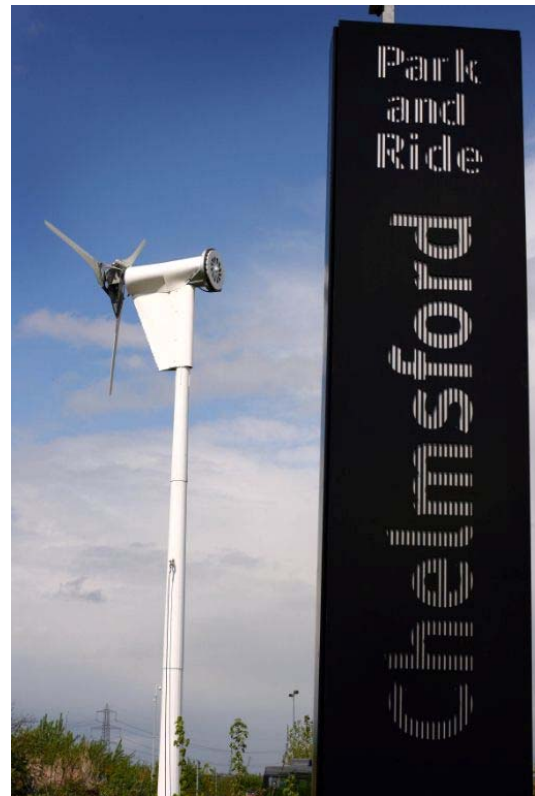
The majority of future growth in Haven Gateway Essex will be focussed on the town of Colchester. The town has challenging targets for the future delivery of new homes and jobs. These will be provided within several major regeneration areas situated within the existing town, through new urban

extensions on its edge, and supported by transport measures.

Harwich remains one of the UK's most important ports for passengers and freight. Planning approval has been granted for the construction of the Bathside Bay Container Terminal (BBCT) at Harwich to provide for a major increase in UK container handling capacity. This project has not been progressed, partly due to the downturn in world trade and the port owner's preference to complete their Felixstowe South expansion first. However, the port owner is seeking to extend the planning approval for BBCT to cover the period to 2021.

The sub-region contains a number of coastal towns including Clacton, Harwich, Frinton and Walton. They have an important national and regional role for tourism and as traditional coastal resorts. Clacton, and to a lesser extent Harwich, will be the focus of additional growth within Tendring district. These coastal

towns are also priority areas for economic regeneration along with parts of nearby Colchester.



4. OUR VISION FOR THE FUTURE

Having introduced the current context of Greater Essex, the next stage of the ICS considered what changes were required to achieve future visions and aspirations for the area. The vision for Greater Essex below focuses on the key characteristics of the area that need to be transformed over the next 20-30 years ahead. It identifies the major changes that need to be made to enable the Greater Essex economy to realise its full potential. Only those major transformational changes which are genuinely of regional, county, and sub-regional significance have been identified.

This visionary role for the Integrated County Strategy is quite distinct from the management of existing assets and conditions which is already well covered by current strategies and plans.

Preparation of the vision has been informed by the extensive evidence base which has been developed and which has been used in turn to inform judgements about the key transformational changes which must be made. The vision has also been informed by the views of sub-regional partners.

4.1 Vision for Greater Essex

Our ambition for Greater Essex is to create a highly performing and competitive economy that makes a significant contribution to UK economic growth and recovery, provides for the successful regeneration of Essex communities, and provides a high quality of life for our residents. The key transformational changes required to deliver this vision are,

- GE1 – Delivering **sustainable growth** by providing for a balanced pattern of development which promotes housing choice, provides affordable housing, and properly matches homes with jobs, infrastructure, and public

services and creates prosperous places

- GE2 – Providing for a transition to a **low carbon economy** which reduces carbon consumption, provides for low carbon development, updates energy infrastructure, supports business innovation, improves the supply of 'low carbon' related skills, and exploits new UK markets for low carbon products and services
- GE3 – Strongly supporting those **key economic sectors and drivers** which are likely to provide for significant economic and employment growth over the long term, economic inward investment opportunities, and which in turn provide for increased local income and prosperity and act as levers to promote regeneration
- GE4 – Significantly improving the **quality of life** of our residents by regenerating town centres and local communities; increasing the number, quality and choice of local jobs; improving the skills levels of the resident workforce; making best use of the opportunities provided by the London business and job market; and providing a high quality natural and built environment
- GE5 – Substantially improving **connectivity** by promoting more sustainable travel patterns, introducing urban transport packages to increase transport choice, providing better public transport infrastructure and rail/bus services, enhanced inter-urban transport corridors, providing improved digital infrastructure including broadband, and by improving mobile phone coverage

This vision for Greater Essex above has been used to inform and shape the specific identification of the broad outcomes and key priorities which appear

in the rest of this document. In addition, nested within this broad approach, there are also separate visions for each of the four sub-areas which must be integrated also, and which provide for more spatial focus and detail. Each of the sub-regions is covered in turn below and the key links with the wider Greater Essex vision have been cross-referenced, where appropriate.

4.2 Vision for the Sub-Regions

4.2.1 Thames Gateway South Essex

The broad vision for this sub-region is,

‘To undertake a major economic, social, and environmental transformation of the urban areas in the sub-region through a programme of large scale regeneration, employment-led development and transport improvements, so that its local economy, quality of life of residents, and its natural and built environment is significantly improved’.

The Thames Gateway is the UK’s top priority for regeneration. It is the largest regeneration opportunity in Europe and straddles London, north Kent, and south Essex.

The majority of the sub-region’s housing and economic growth is being focussed on the three regional centres of Basildon, Southend, and Thurrock Urban Area. Together these three centres are planned to be the focus of about 70-80% of sub-regional housing growth. There is also a decline in the scale of housing growth from west to east across the sub-region. The existing residential areas in Castle Point and Rochford are more dormitory areas serving the employment centres in Basildon, Southend, Thurrock and London, and are proposed for only modest growth.

In economic terms, these three regional centres will be the key economic drivers

for employment growth in the sub-region, supported by the London Gateway container port project. However, each of the three centres will specialise in somewhat different economic functions. For example,

- Thurrock as a leading transport gateway (focussed on the Port of Tilbury and London Gateway), a centre for logistics & distribution, and as a regional retail centre (focussed on Lakeside Basin)
- Basildon as a business hub providing for research & development, retail, manufacturing industry, offices, and distribution
- Southend as a regional retail and tourism centre, and a focus for cultural and intellectual activities in the sub-region (including a growing university campus)

Thames Gateway South Essex is the part of Greater Essex with the closest economic linkages with London. The economic pull from London will probably increase in future decades to reflect growth within central London and nearby major developments in north-east London. The sub-region can take advantage of London’s world city and metropolitan functions which generally provide for greater job diversity, higher value jobs, and higher incomes. This economic and out-commuting relationship with London is likely to be maintained over future decades.

The key transformational changes required in South Essex Thames Gateway to deliver this broad vision are,

- Providing **major new housing and economic growth** directed primarily to Basildon new town, Southend, and the Thurrock urban area and delivered primarily through town centre regeneration and large-scale urban redevelopment & infilling. [GE1, GE2, GE3, GE4]

- Creating a **balanced pattern of development** across the sub-region which promotes housing choice, provides affordable housing, and properly matches homes with jobs, infrastructure, and public services and creates prosperous places. [GE1, GE2, GE4]
- Providing a more **positive and attractive image** by building on existing strengths and assets, improving the quality and extent of green infrastructure, promoting excellence in the design of buildings and public realm, and creating townscapes of high quality and local distinctiveness. New development should produce sustainable and inclusive communities by promoting mixed uses, a range of community infrastructure and services, and high standards of sustainable design and construction. [GE2, GE3]
- Promoting **town centre regeneration** in Basildon, Lakeside Basin, and Southend. This will help retain more spending within the sub-region, strengthen the economy and provide more local jobs, and improve the range of town centre facilities available to local residents. [GE1, GE2, GE3]
- Improve the quality, availability, and range of **employment sites and premises** to support local business expansion and attract inward economic investment. This includes sites within town centres, office locations, and strategic business parks. It means ensuring that business premises have access to high speed broadband and are fit for purpose to meet business needs. [GE1, GE3]
- Promote and deliver **neighbourhood regeneration in Basildon new town** to improve the condition of existing housing stock, promote housing choice and access to affordable housing, and improve the quality of community infrastructure and services. [GE4]
- Creating an improved, more diverse, and robust **economic base in Basildon new town** by promoting town centre regeneration, providing more high quality office space, and encouraging firms engaged in the research and design sector. [GE1, GE3]
- Maximising the job opportunities arising from the digital economy and other business growth sectors by significantly **improving the skills levels** of the local resident workforce. [G4]
- Supporting the delivery of the **London Gateway Container Port** and its related business park, and making best use of the wider economic opportunities for the sub-region provided by its opening and subsequent growth in traffic. [GE3, GE5]
- Enhance **connectivity to jobs and services and deliver reliable and predictable journey times** across the sub-region to support the economy, major regeneration and growth, and promote more sustainable travel patterns. There will be a particular emphasis on improving connectivity in terms of inter-urban travel, transport access to town centres and key business locations, enhanced rail services, and taking advantage of business and job opportunities within London. [GE5]



4.2.2 Heart of Essex

The broad vision for this sub-region is,

‘To create a prosperous and economically thriving sub-region, with major sustainable growth being focussed on Chelmsford developing as a leading regional centre and supported by vibrant market towns, and where sustainable communities provide for a high quality of life supported by enhanced transport and accessibility links, and with the area’s high quality environmental assets, heritage, and countryside being protected and enhanced.’

Chelmsford has been identified as a regional growth point, and the majority of future growth and development in the Heart of Essex will be focussed on the town of Chelmsford as a leading regional city. There will also be strategic growth at both Braintree and Witham albeit on a much smaller scale, and the triangle of growth based around the three towns, will be an important characteristic of the sub-regional growth pattern into the future. Elsewhere the future growth levels in other parts of the sub-region will be more limited including at Brentwood, Maldon, Halstead, and other settlements.

The key transformational changes required in the Heart of Essex to deliver this broad vision are,

- Providing **major new housing and economic growth at Chelmsford** delivered by town centre regeneration, large-scale urban redevelopment & infilling, and major new urban extensions on the edge of the town to create sustainable new neighbourhoods. [GE1, GE2, GE3, GE4]

- Promoting **major redevelopment of opportunity sites in Chelmsford town centre** to strengthen the economy and provide more local jobs, improve the range of town centre facilities available to local residents and to accommodate an increasing population. [GE1, GE2, GE4]
- Creating a **balanced pattern of development** across the sub-region which promotes housing choice, provides affordable housing (including for elderly care), and properly matches homes with jobs, infrastructure, and public services and creates prosperous places. This includes the delivery of a large new neighbourhood at north-east Chelmsford and new urban extensions at north-west Braintree and north-east Witham. [GE1, GE2, GE4]
- New development should produce **sustainable and inclusive communities** by promoting mixed uses, a range of community infrastructure and services, and high standards of sustainable design and construction. [GE1, GE2, GE4]
- Enhance **connectivity to jobs and services and deliver reliable and predictable journey times** across the sub-region to support the economy, growth, and lead to more sustainable travel patterns. [GE2, GE4]



4.2.3 West Essex

The broad vision for this sub-region is,

‘To create a sustainable and employment-led major growth point focussed on the renaissance, revitalisation and transformation of Harlow as a leading regional centre, served by a world class international airport at Stansted Airport and improved transport links, and where there is a pattern of vibrant market towns and villages set within attractive undeveloped countryside containing high quality environmental assets, heritage, and prosperous rural enterprises.’

Harlow is a priority area for major regeneration and is also proposed for significant future growth. Substantial housing and employment development will occur to enable a significant transformation within the town and the growth of its retail, commercial, cultural, and education offer. It will have a step change in its importance as a major urban centre within the region and will reinforce its role as the dominant regional and sub-regional centre serving the southern part of the sub-region.

The key transformational changes required in West Essex to deliver this broad vision and pattern of growth are,

- Promote the **major renaissance of Harlow** through a step-change in its role as a major housing growth point, regional town centre, and strategic employment location. This will be achieved through a combination of the regeneration and redevelopment of the existing town centre, selected neighbourhood and estate regeneration & renewal, the proposed urban extensions on the edge of the town, transportation and infrastructure improvements, and the conservation and enhancement of green infrastructure. [GE1, GE2]
- The **major redevelopment and regeneration of Harlow town centre** to provide a catalyst for local employment growth and wider regeneration of the town, and to improve the retail offer and evening economy so that it is much more attractive to retail occupiers, residents, businesses, and visitors from the rest of the sub-region. The town centre needs to move significantly up the regional retail hierarchy so that it more attractive to new inward investment and there is less leakage of spending to external town centres. [GE1, GE2]
- Provide greater **choice and diversity in housing stock in Harlow** to provide more affordable and key worker housing as well as high quality and executive housing to support a growing and more mixed economy and the attraction of inward economic investment. High quality neighbourhood renewal will be undertaken integrating together old and new housing. [GE1,GE2]
- Measures to raise **employment rates and labour force qualifications in Harlow**. These cover raising educational attainment in primary and secondary education, greater proportions of resident workers with NVQ3 and 4 or in higher education, removing barriers to employability, and improved entrepreneurial skills. Anglia Ruskin University campus will be a key driver in raising the regional economic importance of the town, its inward investment prospects, and providing enhanced educational, skills and training for the town’s residents and businesses. [GE4]
- Expanding and diversifying **Harlow’s local employment base** through town centre redevelopment and regeneration, business innovation and cluster expansion around leading local

companies, using the London 2012 Olympics and Paralympics to create business networks and investment, promoting the growth of small to medium sized companies, and accommodating economic development serving Stansted Airport. This will be supported through the provision of well located and high quality employment land and premises. [GE2, GE4]

- Significantly upgrading **Harlow's transport and other infrastructure** to support business and housing growth, reduce road traffic congestion, and support the town's role as a regional transport node for public transport services. Measures include an enhanced A414 route, redesigned road junctions and traffic control, and improved facilities for passenger transport, cycling, and walking. Harlow Town Station will be developed and improved as a key gateway to the town and as a commercial hub. Basic public utilities such as energy supply, water supply, and waste water treatment must be significantly upgraded to support the town's regeneration and growth. [GE2, GE5]
- Provision of **affordable housing** within Epping Forest and Uttlesford districts to improve housing access and choice. [GE 1, GE4]



4.2.4 Haven Gateway Essex

The broad vision for this sub-region is,

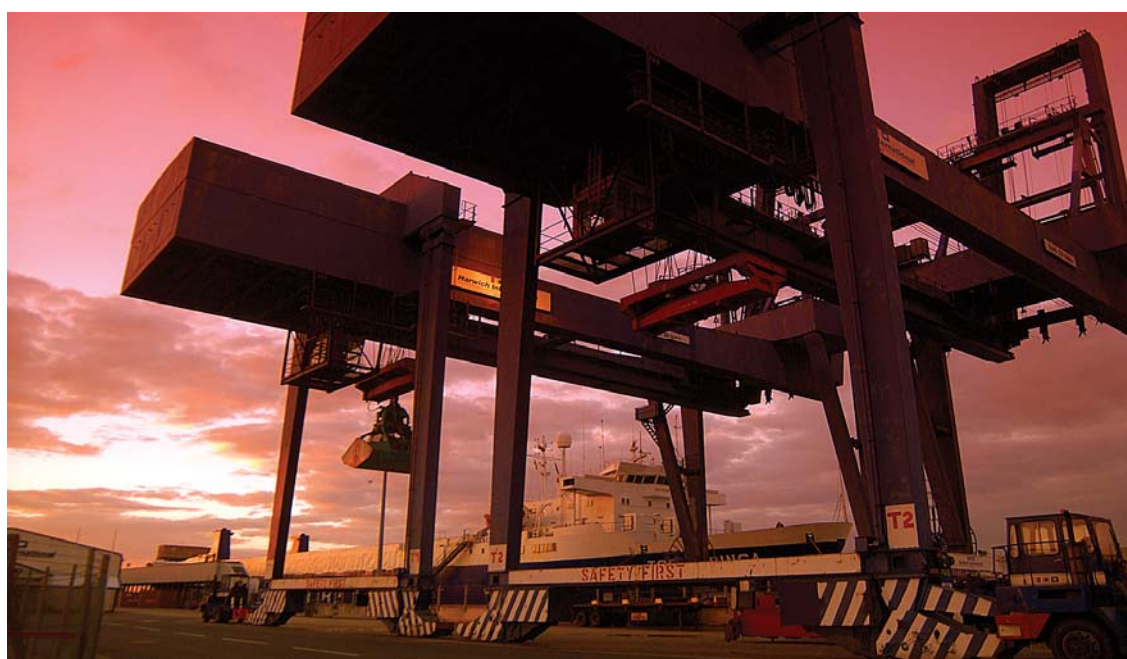
'To create a high quality environment for residents, workers and visitors by capitalising on its location as a key transport gateway, realising its potential for significant sustainable growth, addressing its needs for economic regeneration, creating an additional focus for growth of hi-tech, knowledge based employment, and protecting and enhancing its high quality, attractive and natural assets.'

Colchester will become a leading and prestigious regional centre reflecting its significant opportunities and potential. It will be the dominant growth point in Haven Gateway Essex for new housing and economic development; and will continue to strengthen its position as the major economic, retail, service, cultural, and leisure focus for the whole of the sub-region. The main towns in Tendring will have more modest growth directed mainly to Clacton and with a strong focus on regeneration. Further growth and development will be used as a key lever to promote major regeneration initiatives.

The key transformational changes required in Haven Gateway Essex to deliver this broad vision and pattern of growth are,

- Providing **major new housing and economic growth at Colchester** with the focus of new development at Colchester Town and Stanway. This growth will be delivered by major town centre regeneration, large-scale urban redevelopment & infilling, and major new urban extensions to create sustainable new neighbourhoods. [GE1, GE2, GE3, GE4]

- Creating a **balanced pattern of development** across the sub-region which promotes housing choice, provides affordable housing, and properly matches homes with jobs, infrastructure, and public services and creates prosperous places. [GE1, GE2, GE3, GE4]
- New development should produce **sustainable and inclusive communities** by promoting mixed uses, a range of community infrastructure and services, and high standards of sustainable design and construction. [GE1, GE2, GE4]
- A programme of **major regeneration** across the sub-region focussed on mixed employment, housing supply, and other social aims including physical renewal principally in Colchester and in coastal settlements including Harwich, Clacton and Jaywick. [GE1, GE2, GE3, GE4]
- Enhance **connectivity to jobs and services and deliver reliable and predictable journey times** across the sub-region to support the economy, regeneration, and growth. At Colchester this will include the delivery of park and ride, rail improvements, cycle town improvements, and improved access to the town centre. [GE2, GE4]
- Promoting the growth of **knowledge based, creative, and tourist industries** across the sub-region by the provision of suitable sites, creative business centres, new hotel and conference facilities, and tourism attractions. [GE3]
- Supporting the delivery of the **Bathside Bay Container Terminal** and making best use of the wider economic opportunities for the sub-region provided by its opening and subsequent growth in traffic. [GE3, GE5]
- Promoting the growth and location of **wind port and related industries** focused on Harwich and the University Essex. In particular, Harwich will be promoted as a location for wind port and associated industries, capitalising on supply chain opportunities and the development of a skills hub for the renewable energy sector. [GE2, GE3]



5. THE KEY DRIVERS OF CHANGE

By reviewing the feedback from partners during the consultation workshops, and from analysis of the evidence base, vision statement, and SWOT analysis discussed in the previous sections, it became apparent that there were four key drivers of change that were guiding the discussion and consideration of priorities to be included in the ICS. The four drivers are:

1. Skills and economic development
2. Town centre regeneration and development
3. Neighbourhood regeneration, housing quality and choice
4. Connectivity and sustainable travel

It was agreed that these drivers should guide further research of issues in Greater Essex, and inform the consideration of priorities to be included in the ICS. The following section outlines the main findings from research and analysis conducted around these key drivers, and shows how this information was used alongside priorities identified during the workshops and evidence gathering stage, to inform the development of the ICS 'priority themes'.

5.1 Key driver one - Skills and economic development

Conclusions on skills and economic development in Greater Essex have been largely informed by the Essex Economic Assessment, the Employability and Skills Strategy, and feedback from participants at the ICS workshops. This section provides a summary of the relevant key conclusions from the ICS evidence base.

The Greater Essex economy is characterised by the vitality of its small business base, the entrepreneurs that manage local firms, and the strategic importance of its road, rail, airport, and port connections. At the same time,

Greater Essex is reliant on the buoyancy of the London economy for the ongoing employment of 20 percent of its workforce. To improve economic development in the area, Greater Essex needs to:

- further embrace its links with the capital;
- support new, emerging, and existing businesses;
- help businesses increase their ability to trade internationally, in order to maintain a foothold in the global marketplace;
- support the growth of key sectors, including working with, amongst others, major investors and universities, to focus on innovation in key sectors of renewable energy, and ports and logistics;
- support the investment in London Gateway and Harwich Ports and focus shared resources on the offshore renewables sector;
- support the development of employment centres, including capitalising on the growth of ports and airports; and
- improve skills levels at Levels II, III, and IV, and ensure there is a highly trained workforce to encourage companies to locate in Greater Essex.

To maintain a foothold in the global marketplace, Greater Essex needs to build on its existing strengths within, and support the growth of, **key sectors**. In comparison to other counties in the East of England, Greater Essex has the highest GVA in the following sectors listed below. To build on existing strengths in Greater Essex, the following sectors should be considered to help guide growth in the area.

- Manufacturing in relation to 'low tech', metals and engineering, chemicals and process industries, and recycling
- Construction

- Wholesale, distribution and sale and maintenance of motor vehicles
- Retailing
- Hotel and catering
- Air, land, and water transport
- Finance
- Public administration
- Education
- Health
- Personal services

The Department for Business, Environment, and Skills (BIS) has investigated what could be the most influential sectors in the world, and what the UK has the potential to deliver in the future⁶. The investigation concluded that key future sectors for growth are:

- Advanced manufacturing, in relation to aerospace, the use of composite materials, the industrial biotechnology sector, and developing plastic electronics
- Life sciences, including pharmaceutical, medical, biotechnology and medical technology companies
- Low carbon energy, in relation to offshore wind power; wave and tidal power; civil nuclear power; carbon capture and storage; ultra-low carbon vehicles; low carbon buildings and construction; low carbon aerospace; chemicals and industrial biotechnology; low carbon electronics, and information and communications technology; business and financial services; and carbon markets
- Creative and digital industries

A large number of companies related to these key sectors are already located in Greater Essex. There are plans to support further growth at a number of locations. For example, there are ambitions to support the development clean-tech manufacturing in Chelmsford by securing the establishment of an innovation centre to assist the start up of new businesses in the Heart of Essex. Also, establishing a sector strategy for healthcare has been identified as a local priority in Harlow, to capitalise on existing local expertise and to establish a sector strategy for healthcare.

Supporting enterprise in its broadest sense and throughout a range of sectors and specialisms is more important than ever during a period of public sector retraction. Greater Essex should aim to help its businesses begin to solve social and environmental issues through economic activity, by bolstering the renewable energy sector, and by encouraging innovation.

Greater Essex needs to attract new business investment to the area by **creating a strong economic base** to create the right conditions for growth. Feedback from partners throughout the ICS process has suggested that ways to achieve this could include maximising the effectiveness of ports and airports in Greater Essex, expanding enterprise facilities around Southend Airport, and supporting the growth of the London Gateway. LDFs across Greater Essex highlight the need to provide better quality business parks, particularly in the main urban areas.

Skills are a key driver for business competitiveness and can ensure the sustainability of a local economy. Research suggests that there is a need in Greater Essex to **improve skills levels**, and ensure that they are at least in line with the national average. Local businesses consistently cite the lack of work trained young people to replace the ageing

⁶ See 'New Industry, New Jobs' (April 2009), 'Partnerships for Growth: a national framework for regional and local economic development' (December 2009), and 'Going for Growth: Our Future Prosperity' (January 2010).

population as a major difficulty. Moreover, local businesses attempting to create new niche markets in the area have difficulty finding workers with technician level skills (at Level III and beyond)⁷.

Currently Greater Essex has skills levels at Levels II, III and IV that are lower than the regional and national averages. Almost 1 in 8 adults (13.5%) have no qualifications in Essex. This rises to over 1 in 6 in the five Essex districts of Basildon, Maldon, Epping Forest, Tendring, and Castle Point. Significantly, for future jobs, 37.8% of people do not hold a Level II qualification. Recognising recent improvements in examination results, almost half (45.6%) of 16 year olds still leave school without Level II (5 GCSEs (A*-C) including Maths & English), which is required to access higher education or for most future jobs. Currently 7,633 young people in Essex aged 16-19 are in employment without Level II qualifications. This impedes the ability of these young people to sustain, and progress in, employment.

Worklessness among younger people has also been identified as an issue in Greater Essex. An increasing number of young people aged 16-24 are economically inactive, with around 18,000 people classified as either not in employment, education, or training (NEETs) or claiming working age benefits. In the last year, Essex had 2,500-3,000 additional NEETs. In October 2010, the figure stood at 3,482, around 400 higher than the peak of 2009. Over 7,000 18-24 year olds claim Jobseekers Allowance (JSA), and a further 4,680 claim sickness benefits. In the recession, unemployment doubled to 28,000 JSA claimants. Additionally, intergenerational worklessness and child poverty are growing problems, where almost two-fifths of 16-24 NEETs live in

workless households and one in six children live in poverty. At the ward level, there is a strong correlation between poorly performing schools, high NEETs, and high levels of worklessness and dependency. This degree of worklessness reduces local tax yields, adds to local benefit costs, and impacts negatively on a range of public services. All of the factors identified above can lead to poor health, jobs prospects, and reduced life expectancy for unemployed Greater Essex residents.

The need to intervene in the vicious cycle of low skills and increasing worklessness should be a key feature of the ICS. Securing the improved provision of 14-19 education is a particular focus for South Essex, through working closely with businesses and providing additional college facilities where possible.

It should also be a shared intention, notably in the Heart of Essex, to work more with businesses in establishing where skills gaps occur and respond quickly to their needs. The ICS should aim to support education provision at further education colleges and universities. In the Haven Gateway and in South Essex, skills improvement should be aligned with proposals for economic development to improve local skills in renewable energy and the ports and logistics sectors. Initial work on this has already been started through engagement with leading businesses and universities.

Town centre improvements across Greater Essex could also be influential in improving skills. There is opportunity, particularly in Harlow and Basildon, to provide further education facilities in the town centres. General improvements to town centres in key urban centres have the potential of encouraging new businesses to the area, and providing more skilled employment. This is discussed further next.

⁷ *The Employability and Skills Strategy makes initial proposals and aims to influence other stakeholders to address these issues*

5.2 Key driver two – Town centre regeneration and development

The following section identifies the key issues relating to town centre regeneration and development, and outlines why there is a need for town centre related priorities for Greater Essex.

For Greater Essex to continue to improve its economy, and compete with surrounding economic growth areas, there is a need to enhance the attractiveness of the area, and particularly within some of the key urban centres. To promote Greater Essex as a place to invest, it will be important to have attractive and vibrant town centres, which can provide a broad range of services and facilities for both businesses and residents⁸.

A vibrant and attractive town centre should provide;

- services and facilities that meet the needs of the local population;
- an attractive environment which encourages residents to use their local town centre, rather than travelling long distances to other centres;
- a good range of leisure and cultural facilities that can encourage more visitors to an area, and increase the general viability of the town centre;
- a well designed and attractive town centre that can improve the perception of the town and

⁸ *Town centre uses include retail, leisure, entertainment, intensive sport & recreation uses (such as cinemas, restaurants, bars and pubs, night clubs, fitness centres, indoor bowling, bingo halls), offices (public and private), and arts, culture and tourism development (including theatres, museums, galleries, concert halls, hotel and conference facilities). (PPS4 Planning for Sustainable Economic Growth)*

encourage new residents and businesses to locate in the area.

Town centre regeneration and development is not just about the direct delivery of jobs, homes and shops, it can also have a catalytic effect of attracting people to live and work in a town, and improving its overall economy.

There are a number of town centres in large urban areas across Greater Essex that fail to meet these key features of a successful town centre. Greater Essex town centres often have similar problems that relate to poor quality environments and public realms, a need for modernisation, and improvement to the range of services and facilities available. The two new towns of **Harlow** and **Basildon** both suffer from outdated design, layout, and inadequate services to meet the needs of the town, where population growth has failed to be aligned with service provision and modernisation in the town centre. Both centres identify a need for an improved leisure and night time economy, new offices, and increased housing provision.

The centres also have some individual regeneration needs. Basildon aims to improve the linkages between facilities within the town centre by creating better and more attractive connections to the railway station, and planned improvements to the college facility would enhance the town centre's range and quality of facilities. Significant investment is needed in Harlow Town Centre, and in particular Town Centre North, to enhance the retail offer and recover lost expenditure currently migrating to competing centres. Harlow currently faces strong competition from a number of significant town centre and out-of-centre shopping facilities in the surrounding area.

Southend, Basildon and Harlow town centres all fail to capture the amount of retail and leisure spend that would be

expected for urban areas of their size. In **Southend** this can be attributed to physical regeneration requirements, where the existing environment of the centre is not considered suitable to attract increased numbers of visitors. Improved access and links between different uses is required, alongside improvements to the range of facilities in the centre, to modernise the existing office stock, increase housing and student accommodation, and promote the development of the university as a driver for further physical regeneration.

Continued population growth in **Chelmsford** needs to be aligned to the provision of extra retail capacity and facilities available in the town centre. Redevelopment of the town centre will be an important element to assist further growth in Chelmsford. Plans for the town centre aim to make it a leading regional centre, and include an expanded shopping area with a new anchor store, improved transport facilities, and increased town centre housing, proposed as an extension to the main central area.

Chelmsford and **Lakeside** provide a differing challenge to many other town centres in Greater Essex, since their major need is redevelopment rather than regeneration. Both of these successful centres require redevelopment to maintain their success, and need to grow and adjust to meet the changing demands of the local population.

The Thurrock Urban Area is proposed for major growth in new housing and population over the next 15-20 years. This will require the provision of additional retail and other town centre facilities. Existing town centres in the borough have constraints to further growth and the physical re-modelling of the Lakeside Basin area provides the best opportunity to provide for Thurrock's growing needs. However this will require major redevelopment to change the nature and layout of the area from an

out-of-town shopping centre to a town centre. This will include increasing the range of town centre functions, improving public transport facilities, and creating better linkages between various facilities and the surrounding area.

The continued success of Lakeside is highly important to Thurrock, where there is a large reliance on the retail sector for local employment. Redeveloping the Lakeside area would also create more jobs, new industrial and office employment land, new homes and apartments, and make Lakeside a more sustainable area that is better connected to its surroundings.

Colchester is considered to be the one of the more successful town centres in Greater Essex. However the retail performance of the centre has recently declined, slipping 10 places to 46th during 2006-2009 in the CACI⁹ UK retail rankings. Colchester has ongoing plans to develop a new cultural quarter, increased retail and housing, and a new Magistrates Court and multi-storey car park within the town centre. Wider improvements to Colchester Town Centre include reducing traffic and creating a better pedestrian experience and links for cyclists.

5.3 Key driver three - Neighbourhood regeneration, housing quality and choice

The theme of neighbourhood regeneration, housing quality and choice includes a range of issues closely concerned with improving people's quality of life and ability to obtain housing that meets their current and future needs. Sustainable growth is closely connected to this theme, and discussed within this section below, however it is considered to be a cross-cutting issue that is connected with all of the four themes.

⁹ CACI Retail Footprint © CACI Limited 2010

Although Greater Essex is generally a prosperous area, there are localised pockets of **deprivation**. Tendring, Harlow, and Basildon contain some of the most deprived areas in Greater Essex, where there are high rates of child poverty and low life expectancy rates. Deprivation issues are closely linked to worklessness. These areas have large regeneration needs to improve the quality of housing and urban environment in the most deprived neighbourhoods.

Jaywick's Grasslands and Brooklands area in Tendring is one of the most deprived wards in England, and consists of small, poorly constructed properties on small unadopted lanes. The condition of the private sector housing stock is a major concern, much of which has exceeded its useful life. Jaywick is also in a high risk flood zone defended to current flood risk, but in need of substantial improvement to 'defend the line' in relation to climate change related sea level rise.

There is only a small amount of **poor quality housing** in Greater Essex, however a large proportion of these houses can be attributed to a few particular areas. The districts of Basildon and Southend have the highest amount of local authority housing that fail to meet the national government DHS (Decent Homes Standard), and Braintree has the largest proportion of registered social landlord properties that fail to meet the Decent Homes Standard (DHS). Although only 13% of local authority dwellings in Harlow fail to meet the DHS, this is a more severe problem due to the large amount of social housing in the district, amounting to 1,290 poor quality dwellings. Harlow also has an ageing local authority housing stock, with many areas that require updating and modernising.

The extent of poor quality housing in certain **key neighbourhoods** of Harlow and Basildon requires the need for large scale regeneration schemes devoted to improving these areas. Some housing

estates in the New Towns were developed using experimental construction techniques, or with techniques or materials designed for a limited building life. Poor design and layout of some areas, combined with a lack of maintenance to the condition of buildings and socio-economic problems, has created some neighbourhoods which do not function well as attractive places to live.

Regeneration in Basildon is currently being undertaken in key neighbourhoods of Fryerns, Craylands, Five Links, and Royal Court. Following the planned completion of these areas by 2012, there are further sites with similar problems that will come forward. One such site is the Felmores Estate, a large housing area that has exceeded its original life expectancy of 30 years, and suffers from a poor standard of design and layout. Key neighbourhoods identified for regeneration in Harlow are Aylets Field, Copshall Close, The Briars, Barley Croft, Lower Meadow, and Northbrooks. Required improvements in the key neighbourhoods for both Harlow and Basildon include:

- Providing a range of housing to create a more socially balanced and mixed neighbourhood
- Providing better quality and more sustainable housing
- Improvements to the layout of communal spaces, and linkages between different areas
- Providing quality green space in terms of views, accessibility and security
- Enable improvements to community facilities

A different sort of regeneration is required for East Colchester, where the aim is transformation of a derelict former port area to a mixed use development of 100,000 sq ft of commercial space, 2,000 new homes, and improved transport links.

The need for greater **housing choice** to provide larger detached family and ‘executive’ housing is also apparent in both Harlow and Basidon, where there is currently a large amount of smaller terraced housing. This problem clearly affects commuting patterns in Harlow, where many higher level workers prefer to live in other areas and commute into the district. An improved housing offer could encourage more high level workers in Harlow to live in the town.

5.3.1 Sustainable Growth

In Greater Essex it is generally perceived that in the past there has been a large amount of housing growth that failed to be matched with a sufficient level of associated infrastructure and employment growth. To achieve a sustainable level of growth in Greater Essex, there needs to be **a more balanced pattern of development** to ensure that **housing is matched with jobs and services**. In current planning policy, the areas proposed to have the highest amount of housing growth in Greater Essex are Harlow, Thurrock, Colchester, Chelmsford, and Basildon. These areas will need to consider how this growth can be provided sustainably in relation to location of housing, capacity of existing infrastructure, requirements for new services and facilities, and proposed levels of jobs growth.

The most sustainable option for growth is to ensure that housing is provided with good links to employment and services, and to reduce the need for people to travel long distances.

Affordability of housing is an issue across all Essex districts, where high house prices combine with low provision of affordable housing¹⁰ to make owner occupation

¹⁰ *Affordable housing includes social rented and intermediate housing provided to specified eligible households whose needs are not met by the private housing*

more difficult to achieve. Demand for affordable housing in Essex far exceeds actual or planned delivery, a trend which can be expected to continue in the current economic climate. Affordability issues are made worse by increasingly large local authority housing waiting lists, a national problem that in Greater Essex has recently increased most severely in Southend and Harlow.

The most expensive districts to buy a house in Greater Essex are Brentwood, Epping Forrest, and Uttlesford. Affordability problems are exacerbated in rural areas, where there are generally higher house prices, lower wages for local workers, and less available affordable housing. This issue can be observed in the three most expensive areas in Greater Essex, but increased further by proximity to London for Brentwood and Epping Forest. Affordability issues are also identified in the Heart of Essex, where good connections to London have increased local house prices, but local wages have not increased at the same rate.

Some areas of Greater Essex require a wider range of housing types to provide sufficient provision of **housing choice** for the current and future population. As identified above, the type of housing in Harlow and Basildon does not meet the needs of some of the working population, who require larger family and ‘executive’ housing. The Thames Gateway has the lowest sub-regional level of detached dwellings in Greater Essex, and it is considered that a greater range of housing types could encourage more high level workers to live in the area. Insufficient provision of housing to meet

market. Intermediate affordable housing operates at prices and rents above those of social renting, but below market price or rents, including shared equity products (e.g., HomeBuy), other low cost homes for sale and intermediate rent. (PPS3 Housing, 2010)

the needs of an area means that people are more likely to live and work in different areas, increasing daily commuting distances. Sustainable growth should ensure that people have the ability to live in areas that meet their lifestyle needs in relation to jobs, schools, and services, rather than making housing choices solely based on house prices and type of available housing.

In most areas there will also be a need for more and better designed older peoples housing to sustainably meet the housing needs of the future population. Improvements to medical science and people's general health has led to a national pattern of people not only living longer, but being more active and living for longer in their own homes as they reach old age. The amount of the population aged 65 and over is expected to increase dramatically in future years, and in 2031 Tendring is predicted to have the highest percentage of households aged 65 and over in Essex. This necessitates greater consideration into the type of housing that should be provided to meet the future needs of the local population, which will require a higher provision of housing for older people¹¹.

5.4 Key driver four – connectivity and sustainable travel

Connectivity refers to the existence of good transport and communication links that enable people to access jobs, education, health and other services. Connectivity is also essential for business to function by providing access to employees, suppliers, and customers. Effective transport and communications networks are therefore integral to the delivery of the wider policy agenda and priorities of Greater Essex.

¹¹ *Provision of housing for older people includes lifetime homes, sheltered housing, extra care housing, and nursing homes.*

Greater Essex is fortunate to have strategic transport routes in terms of road, rail, air and sea. The M11, M25, A12 and national strategic roads run through the county, and major trunk roads and local roads such as the A13, A127, A120, A130 and A414 give good coverage. Three main rail lines radiate from London, supplemented by a number of branch lines, serving 75 railway stations, and the London Underground extends into the south of the county. Greater Essex has two airports at London Stansted and London Southend Airport, serving a variety of domestic and international destinations. Harwich International Port provides connections to Holland and Denmark, whilst Tilbury port, and the planned Bathside Bay development and London Gateway, will provide for improved worldwide connections for container traffic. The Port of Felixstowe is just to the north in Suffolk.

It is now understood that improved transport connectivity cannot be provided by simply building additional transport capacity, particularly at a time when funding for new infrastructure is likely to be limited. Business and other transport users need journey times to be predictable and reliable. For Greater Essex to achieve this it is increasingly important that more effective use is made of our existing transport networks and investment is focused at locations where it can have the greatest benefit to the economy and quality of life, providing reliable, predicable and affordable connectivity for people living and working in Essex.

Conclusions on connectivity and sustainable travel in Greater Essex have been largely informed by Local Transport Plan preparation, and feedback from participants at the ICS workshops. This section summarises the relevant key conclusions from the ICS evidence base, by considering the following connectivity and sustainable travel features:

- Inter-urban transport corridors
- Integrated transport packages for main urban areas
- Public transport interchanges
- New and existing rail stations
- High speed broadband and mobile phone coverage

The following high level conclusions are used to inform the consideration of connectivity based priority themes for the ICS. The local transport plans will take these conclusions and identify projects that will best deliver improvements across Greater Essex.

5.4.1 Enhancements to key inter-urban transport corridors across Greater Essex, into London, with the rest of the UK and Europe

The inter-urban transport corridors across Greater Essex have a key role to play supporting the success of our highly productive economic centres by enabling the efficient movement of goods and people. The connectivity of the transport system as a whole is critical in enabling people to get to work, travel for business, and for the freight sector to deliver goods.

Traffic is growing on key inter-urban routes across the UK, and Greater Essex is no exception. Greater Essex is strongly influenced by the proximity of London, the east coast ports, and Stansted airport, generating traffic that has origins and destinations beyond Greater Essex that is important to the national economy. A large proportion of movement across the area is from national traffic flows, particularly in relation to north / south movement across Greater Essex and access to major ports and airports, which is managed nationally rather than at a county level.

The Department for Transport (DfT) regards the M25, M11, A12, and A13 as far as Tilbury, and the rail lines between London and Stansted, and London and the Haven Ports (for freight only) to be

transport routes of national significance. The A120 is also a highly important route as part of a Trans-European Network (TEN) linking Felixstowe and Harwich to Holyhead and other west coast ports of the UK. These routes provide connections between London, the ports and the rest of the UK. However, all of these routes, both road and rail, are operating at or near to their capacity and journeys can be unreliable, especially at peak journey times. A recent “network resilience” study for DfT identified the following sections as being of greatest concern - M25 north of the Dartford Crossing, A13 Purfleet to Stanford le Hope, A130 Stanford le Hope to South Benfleet, A12 Brentwood to Ingatestone, M25 Brentwood to Epping, M25 Junction 23 to 27, A12 Chelmsford bypass, Great Eastern Mainline Chelmsford to Manningtree, GEML Brentwood to Chelmsford.

There are some proposed transport projects in Greater Essex of national significance that could assist in reducing problems on key transport corridors. These include:

- Felixstowe to Nuneaton rail freight, which would increase the capacity of freight that could be managed by rail through the area
- Crossrail, increasing rail passenger capacity across London
- Lower Thames Crossing, which would relieve pressure on the heavily congested Dartford crossing
- M25 managed motorway capacity increases, to increase capacity at congested junctions near Essex

The routes that connect the main urban centres in Greater Essex are considered to be of significant economic importance to the area. Generally speaking, connections between the main towns are good and much of the local road network is operating within its capacity. However, some parts of the network experience significant congestion, including the A127 and A130 in south Essex, the A120 and

the A414 in central Essex, and connections from north and west Harlow to the M11. There are also locations where there are barriers to connectivity for specific modes of transport, for example bus travel in Thames Gateway area would have the potential to be greatly improved by SERT (South Essex Rapid Transport).

London is a significant provider of employment for the population of Greater Essex. In 2001 more than 142,000 people commuted to London to work, and more than half of the travel was by rail. The excellent rail connections to London from the main urban areas are likely to result in the on-going attraction of London as a place to work, with Greater Essex benefiting from increased employment opportunities and the increased spending power that London jobs can bring to the local area. Good rail connections can also be used to promote relocation to Greater Essex by businesses looking for a cost effective alternative to London as their base of operations.

London Stansted is the third busiest airport in the UK and claims to be the fastest growing in Europe, flying 19.7 million passengers to 144 destinations in 2009. Stansted Airport also handles around 200,000 tonnes of freight each year, making it the third largest handler of air freight in the UK.

Major port growth will be significant for the Essex economy; however, the ports at Harwich, Tilbury and port developments at London Gateway and Bathside Bay will place increased demands on roads such as the A12, A13 and A120. The Port of Felixstowe in Suffolk also generates significant road traffic and about 25 freight trains pass through Greater Essex each day, mainly related to Felixstowe port traffic.

Transport related priorities should be focused on routes where improvements will give the greatest benefit to the

economy of Greater Essex such as those that;

- allow access to current and future major employment areas
- give access to the main urban areas
- provide access to the international ports and airports

5.4.2 The need for integrated transport packages for main urban areas in Greater Essex to support the local economy, environment, growth, and regeneration

The main urban areas of Basildon, Chelmsford, Colchester, Harlow, Thurrock, and Southend are the drivers of the local economy, and have large catchment areas which produce substantial transport movements. Commuting patterns within Greater Essex indicate the key role of the main urban areas in serving their own population and their rural catchments in terms of jobs and services. This presents an opportunity to build on their role as key economic centres so as to promote their greater self containment and make growth more sustainable.

As the effects of recession reduce, and more travel is undertaken alongside increased growth levels in urban areas, there is a risk that this will increase congestion which may harm economic growth. Integrated packages of transport improvements will be necessary to deliver town centre regeneration and development. These packages will focus on improved journey reliability, and increase travel choice to improve the economic performance and competitiveness of local businesses.

It is important to focus on an integrated approach making best use of the network to ensure that as many people as possible can access each of the main town centres efficiently by:

- Improve journey reliability on roads into the main urban areas

- improving information for motorists, such as variable message signing
- developing intelligent transport systems, such as our Urban Traffic Management Control centre to monitor, operate and control traffic signals during periods of heavy congestion.
- increasing the proportion of people who travel by bus, walk or cycle, and therefore reduce congestion by improving strategic public transport links and the provision for cyclists and pedestrians
- Introducing a programme of behavioural measures, such as travel plans, to promote wider travel choices in order to encourage a modal shift to more sustainable modes of transport that produce less congestion.

5.4.3 Key public transport interchanges, access to them, and park and ride facilities

The ability of bus services to contribute to economic recovery and congestion reduction is dependant upon a number linked factors concerning reliability of service, value for money, and capacity to cope with more passengers. Bus services failing to run to schedule undermine existing passenger's faith in the reliability of the service, and discourage potential new users. Lack of passenger growth in turn discourages investment by operators in new opportunities to develop services that will occur as the recession ends. To ensure adequate use of services, operators need to offer prices that are fair for both parties.

Failure to consider these factors could risk increased reliance on travel by car and consequent additional congestion, which could harm economic growth. Over-reliance on cars as a primary travel option cannot be considered a viable option, not only in relation to sustainability and

economic growth, but also in assisting areas with high levels of deprivation. Good quality access to employment and services by passenger transport is essential for people that do not have access to a car.

Improved public transport services could also encourage more people to use more sustainable methods of transport, and reduce the level of air pollution on Greater Essex roads.

To further promote the use of public transport in the main urban areas, improvement plans need to;

- work with bus and rail operators and authorities on closer integration between modes; and
- encourage sustainable travel to our stations to minimise the impacts of commuting on the local road network.

To improve bus based public transport on core bus routes within the main urban centres, there is a requirement to focus on;

- routes serving rail and bus stations
- routes serving large employment sites/areas
- routes serving new residential, commercial or business developments
- routes serving main town centres
- where several bus services use the same route
- routes serving strategic park and ride sites

5.4.4 New and existing rail stations, maximising rail capacity and quality of service

The quality of rail interchanges is highly important to a large number of residents that commute within and out of Greater Essex by rail on a daily basis. In Greater Essex there needs to be an improvement in rail interchanges. Improving rail services and promoting rail travel could

encourage more people to travel by rail rather than by car, particularly between areas within Greater Essex, and thus reduce congestion on the roads.

Work should continue to be undertaken with train operating companies to promote rail travel for work and leisure journeys within Greater Essex, and co-operate with Network Rail over its station development programme looking in particular to improve the accessibility of rail stations and services.

Key features of an integrated approach at local rail stations should include;

- progressing plans for the development of a new station north east of Chelmsford;
- improving facilities at Chelmsford Town Centre station
- improving access to both stations in Harlow
- joint working with rail and bus operators to improve service connections;
- designing better interchange infrastructure, including waiting, turning and information facilities;
- using the Colchester Station Travel Plan as a model to apply at other large stations; and
- improving cycling and walking access to stations, including cycle parking.

5.4.5 Access to high speed broadband and good mobile phone coverage for business premises

Providing transport is not the only way to ensure good connectivity. Alternative digital ways to trade and access services are increasingly available.

Internet access is increasing in importance, allowing businesses to contact customers and suppliers, and allowing new ways of working, such as increased home working for employees. Greater Essex businesses have stated that improvements to telecommunications (broadband and mobile phone coverage) should be one of the main priorities for future investment if Greater Essex is to gain the full benefits from technological advances. Providing a high quality digital infrastructure network is a basic requirement of a modern economy. If Greater Essex is to compete in a fast paced international economy, improvements to its digital infrastructure are essential.

The absence of high speed broadband, mobile phone reception, and general connectivity to services such as post offices is a barrier to economic growth in rural areas. Continuing support is needed to increase broadband and phone coverage and diversify service businesses in rural areas.



6. Methodology

Section 2 introduced the first stage of our approach to producing the ICS, which included assembling a comprehensive evidence base and starting a process of partnership engagement and consultation.

Diagram 3 on the following page outlines the broad approach taken to producing the ICS through 3 further stages. This shows how the evidence base helped to identify the key drivers of change in Greater Essex, and how these stages informed the development of a provisional list of priorities. Consultation with stakeholders and ECEA partners, through discussion workshops and regular meetings, was an important part of each stage of producing the ICS. The final list of priorities was produced through a dual process of consultation and assessment.

The following section explains how the assessment of the provisional list of priorities, alongside further consultation with partners, informed the finalisation of the strategy to produce the final list of priority investments and themes, and the strategic focus of the ICS.

6.1 Assessment of the priorities

The process of consultation with partners and analysis of the evidence base created a list of around 400 priorities suggested for inclusion in the ICS. Further testing was required to reduce the list of priorities, and ensure that only the issues of highest importance were highlighted to create interventions which would produce the greatest benefits for Greater Essex. Four stages of testing were conducted, which included;

1. Removing duplication
2. Testing the priorities against the evidence base, and identifying priorities that could tackle the key strategic challenges identified

3. Testing the priorities against strategic criteria, such as their influence on skills, connectivity, employments etc; and testing priorities against deliverability criteria such as funding streams, difficulty of achievement, stakeholder support etc
4. Removal of priorities that were considered to be business as usual, already covered by existing plans and programmes, and which could be excluded

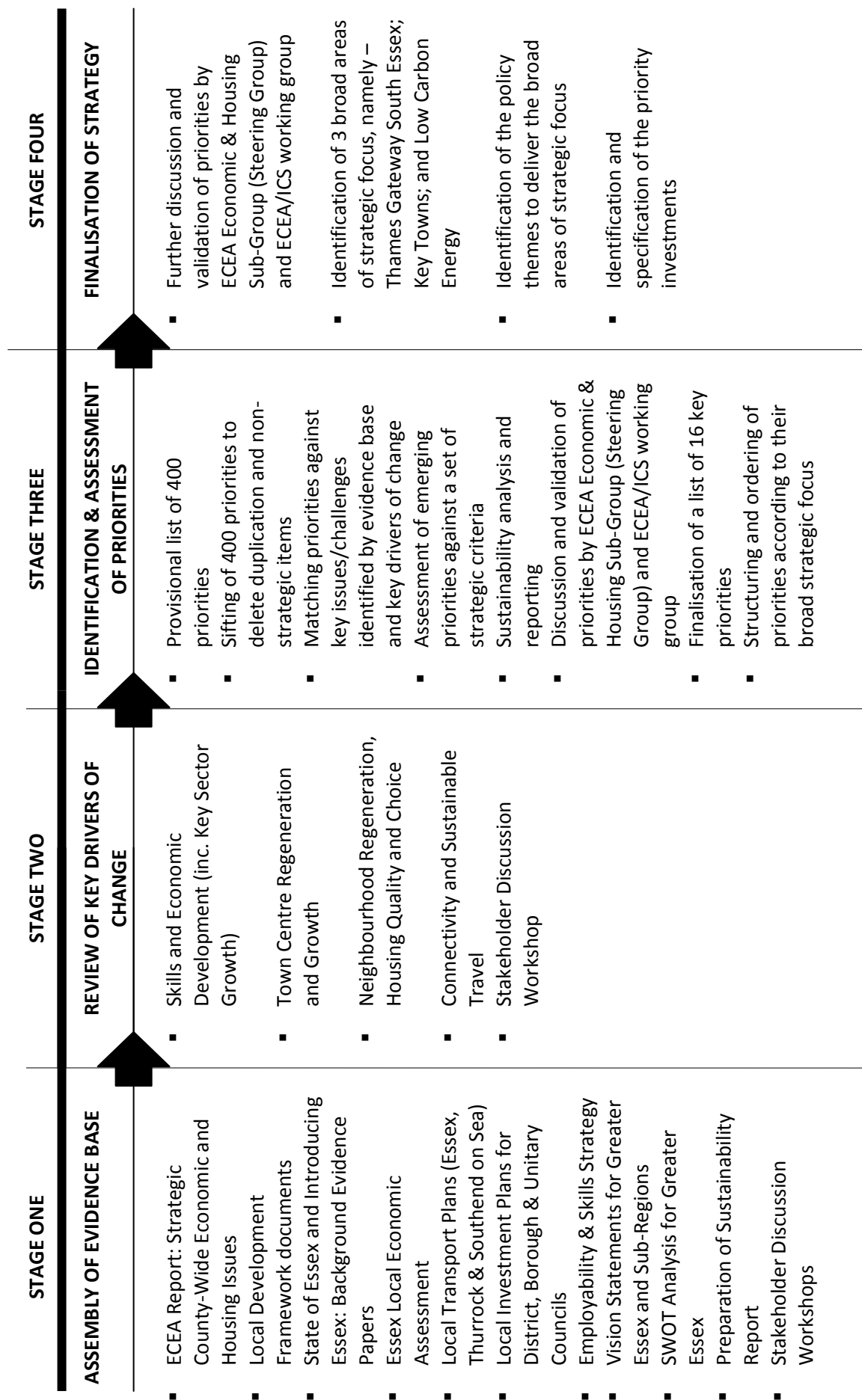
The first two stages of testing removed the largest number of priorities from the provisional list. Many of the priorities initially identified were of local importance to local authority areas, but did not have the strategic importance required for the ICS. Therefore, one of the main aims of the early stages of testing was ensure the inclusion of only high level strategic priorities to guide Greater Essex.

The final two stages of testing were more complex in their consideration of the deliverability of priorities, and whether the task within a priority would be undertaken without assistance from the ICS. These stages of the assessment removed infrastructure priorities considered less deliverable with reduced funding, and priorities regarding the statutory role of councils that could be considered business as usual. Priorities regarding infrastructure expected to be delivered by private companies, such as improvements to broadband and mobile phone coverage, were removed at the fourth stage of the assessment, also being considered in the category of business as usual.

6.2 The ICS Priority Investments

Through a process of sense checking each priority, removing duplication and inappropriate priorities, and scoring priorities against a range of criteria, a list

Diagram 3: Broad method of approach to preparing the ICS



of around 25 priorities was produced and shared with partners. Further consultation with partners throughout this process considered the exact wording, aims, and appropriateness of priorities. This process produced the finalised list of 16 priority investments for the ICS.

6.3 The ICS Priority Themes

Following the assessment process, it was evident that some suggested priorities had not reached the final assessment stage due to the broad thematic nature of their wording and aims. It was agreed that these priorities, alongside thematic priorities identified from the key drivers discussed in section 5, should form a more thematic list of priorities closely connected to the priority investments.

The aim of the thematic list is to provide a broader guide for investment in the area. To show that, even without the consideration of more detailed plans regarding location or specific aims, investment in Greater Essex should be focused towards the eight identified themes.

6.4 The ICS Strategic Focus

Following the production of the priority themes and investments list, it was agreed that a sharper strategic focus was still required for the ICS, which could use key overarching priorities to act as high level guides for investment in Greater Essex.

An assessment of the priority themes and investments developed through the ICS process was conducted by the ICS working group, alongside further analysis of the evidence base and discussion with partners, to identify priorities that adhered to the following criteria;

- Does the priority have strategic influence?

- Does the priority use existing assets in Greater Essex to maximum benefit, and create real economic growth?
- Does the priority support the growth of a key sector in Greater Essex that could allow the area to specialise in a particular industry?
- Does the priority influence issues within the key drivers of change in Greater Essex, that relate to skills and economic development, town centre regeneration and development, neighbourhood regeneration, and connectivity and sustainable travel?
- Does the priority help to address some of the main problems in Greater Essex?
- Are the aims of the priority considered to be achievable in relation to current and future funding streams?
- Could the priority assist in the achievement of other key priorities in Greater Essex, and guide investment to influence a range of more specific priorities?

This final assessment produced three overarching priorities that met the majority of the criteria outlined above. These three priorities provide the strategic focus for the ICS, and are introduced in section 8.



7. THE ICS PRIORITIES

The diagram on the following page lists the priorities developed through the process of research, consultation with partners, testing of priorities, and overall assessment described throughout this document. The diagram brings together all the priority lists and individual strategic focus priorities diagrams to show how all the priorities identified in the ICS are interconnected through the 3 strategic focus priorities.

The table shows three columns of priorities. 'Our strategic focus' identifies

the key overarching priorities where resources should be directed, as discussed in the next section. The 'priority themes' identify broad thematic priorities developed through consultation with partners and from research on key drivers discussed in section 5.

Finally, the 'priority investments' are specific priorities, identified throughout the ICS consultation process and tested through the assessment explained in section 6, which relate to both the key overarching priorities in 'our strategic focus' and the 'priority themes'.



Diagram 4: The ICS Priorities

Our Strategic Focus

Priority Themes

Priority Investments

Thames Gateway South Essex (TGSE)
 Achieve transformational development and change throughout TGSE to significantly improve the local economy, quality of life of residents, and natural and built environment

Key Towns
 Promote opportunities for economic growth, redevelopment, and regeneration in the key urban centres of Southend, Thurrock, Basildon, Harlow, Chelmsford, and Colchester

Low Carbon Energy
 Support the growth of renewable energy as a key sector and promote the growth and location of associated industries in Essex

Town Centres
 Deliver regeneration of town centres in large urban centres and important towns

Neighbourhood Regeneration
 Tackle significant regeneration needs in key neighbourhoods, improve housing quality, choice, and encourage growth

Sustainable Growth
 Create a balanced pattern of development which promotes housing choice, provides affordable housing, and ensures housing is matched with jobs and services with appropriate transport provision to create prosperous places

Economic Drivers
 Promote and maximise potential benefits at key strategic sites for employment and further economic development

Economic Base
 Create improved employment space at key locations in Essex, encourage R&D companies, and provide more quality office space

Skills
 Equip young people and adults with world class skills to meet business needs and enable growth of a sustainable economy

Sustainable Connectivity
 Improve connectivity within and between our main towns to support economic growth

Key Sectors
 Support the growth of key sectors, particularly renewable energy, ports and logistics, creative industries, R&D, Healthcare, and advanced manufacturing

Major redevelopment in Chelmsford Town Centre

Regeneration of Harlow Town Centre

Regeneration of Colchester Town Centre

Town centre regeneration in Basildon, Lakeside Basin and Southend

Reduce significant regeneration needs in key neighbourhoods in Harlow, improving housing quality, and encouraging growth and choice

Promote and deliver regeneration in Colchester

Promote and advance neighbourhood regeneration in Basildon

Create a balanced pattern of sustainable growth, to ensure that major new housing is matched with jobs and services, and create vibrant market towns in our sub-regions

Promote and maximise potential benefits at key sites for employment and further economic development with particular focus on the Thames Gateway

Support the delivery of the London Gateway and make best use of the economic opportunities created by its growth

Support the development and improvement of the Haven Gateway ports and make best use of the economic opportunities created by growth

Creating an improved economic base and quality office space in our key towns, including encouraging R&D companies in Basildon

Maximising the job opportunities arising from the low carbon and digital economy through up skilling the local workforce especially in the Thames Gateway

Enhance connectivity to jobs and services to support the urban economies of our main towns

Deliver reliable and predictable journey times between our main towns, key development sites, and the strategic transport network

Support the promotion and location of wind port and related industries focused on Harwich and Essex University

8. Our Strategic Focus

The three overarching priorities described in this section provide the strategic focus for the ICS, to act as high level guides for investment in Greater Essex.

8.1 Our strategic focus

Thames Gateway South Essex (TGSE)

Achieve transformational development and change throughout TGSE to significantly improve the local economy, quality of life of residents, and natural and built environment

Key Towns

Promote opportunities for economic growth, redevelopment, and regeneration in the key urban centres of Southend, Thurrock, Basildon, Harlow, Chelmsford, and Colchester

Low Carbon Energy

Support the growth of renewable and low carbon energy as a key sector and promote the growth and location of associated industries in Greater Essex

8.2 Thames Gateway South Essex Strategic Focus

Thames Gateway South Essex (TGSE)

Achieve transformational development and change throughout TGSE to significantly improve the local economy, quality of life of residents, and natural and built environment

The Thames Gateway South Essex sub-region has been identified as a strategic focus for the ICS in its own right due to the extent of transformational development and change required in the area. The TGSE area had the largest number of priorities for a sub-region suggested for inclusion in the ICS, and contains a range of strategically influential priorities that could provide maximum benefit to the economy of Greater Essex.

The Thames Gateway is the UK's top priority for regeneration, and the largest regeneration opportunity in Europe. Despite its industrial heritage, Thames Gateway South Essex is an area of significant untapped potential, and one that has previously punched below its weight in terms of attracting inward investment. To realise its full potential it must improve its image, skills levels, the quality of its town centres, and the transport connections between its towns.

Nevertheless, its close proximity and good connections to London and Europe, large economic base with leading companies, and major development opportunities, have all resulted in the area being earmarked for large scale growth in jobs and homes.

Thus far, this has been supported by robust performance of the logistics, manufacturing and retail sectors. The future and sustained realisation of this growth now requires a clear vision to direct future regeneration so that transformational development and change can be achieved.

As explained in section 4, the vision for Thames Gateway South Essex is:

'To undertake a major economic, social, and environmental transformation of the urban areas in the sub-region through a programme of large scale regeneration, employment-led development and transport improvements, so that its local economy, quality of life of residents, and its natural and built environment is significantly improved'.

The ICS will focus on the delivery of transformational change within the vision stated above though the ICS priority themes and investments, listed on the following page, that relate directly to TGSE.

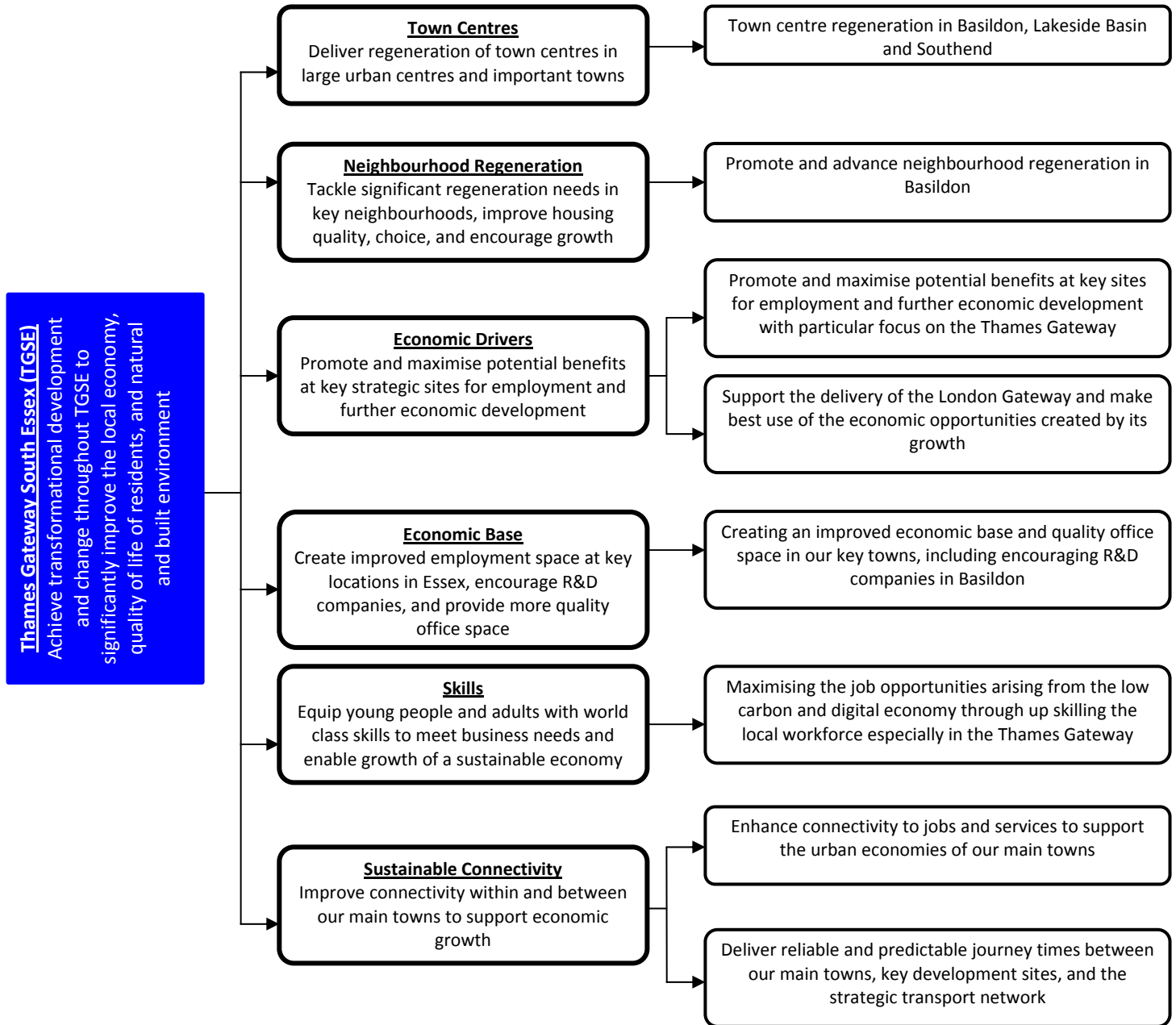


Diagram 5: Thames Gateway South Essex Strategic Focus Priorities

Our Strategic Focus

Priority Themes

Priority Investments



8.3 Key Towns Strategic Focus

Key Towns

Promote opportunities for economic growth, redevelopment, and regeneration in the key urban centres of Southend, Thurrock, Basildon, Harlow, Chelmsford, and Colchester

Since the start of the ICS process, it has been highlighted by partners at the ICS workshops and throughout the analysis of evidence base that key priorities for the main urban areas of Greater Essex relate to;

- town centre redevelopment and regeneration,
- regeneration of key neighbourhoods,
- ensuring balanced growth with new jobs alongside new housing, and
- enhanced connectivity between towns, and to key services and employment sites.

Because these priorities relate to similar issues concerning regeneration, growth and improvement of key towns, and have been identified across all the key urban centres of Greater Essex, in combination they create a strategic influence that could have an important positive bearing on the economy of the area.

Our main towns are the drivers of the local economy and have been identified as critical to the delivery of the ICS. Commuting patterns within Greater Essex emphasise the key role provided by our main urban areas in serving both their own population and their rural catchments in terms of jobs and services.

This presents an opportunity to build on their role as key economic centres, to

promote their greater self containment, and cement their economic vitality by supporting growth and redevelopment with focused investment around stimulating the economy and improving infrastructure.

Well designed and attractive town centres and neighbourhoods improve perception and encourage new residents and businesses to locate there. We want our towns to be successful. We will ensure the growth is sustainable by creating a high quality of life for residents, and providing employment growth alongside new housing to reduce the need to commute long distances. Appropriate transport provision will be necessary to ensure reliable journey times, manage road traffic congestion, and provide a variety of travel choices. Thriving towns are essential to enhance the competitiveness of local businesses and provide attractive places to live and to invest in.

Regeneration and development is not just about the direct delivery of jobs and homes, it will also have a catalytic effect of attracting people to live and work in our towns, and improving the economy of Greater Essex as a whole. Attractive town centres that provide a broad range of services and facilities, and good quality housing for a range of people, will enable Essex towns to emerge as nationally significant magnets for investment.

The priority investments and themes in the ICS associated with key towns are listed on the following page.

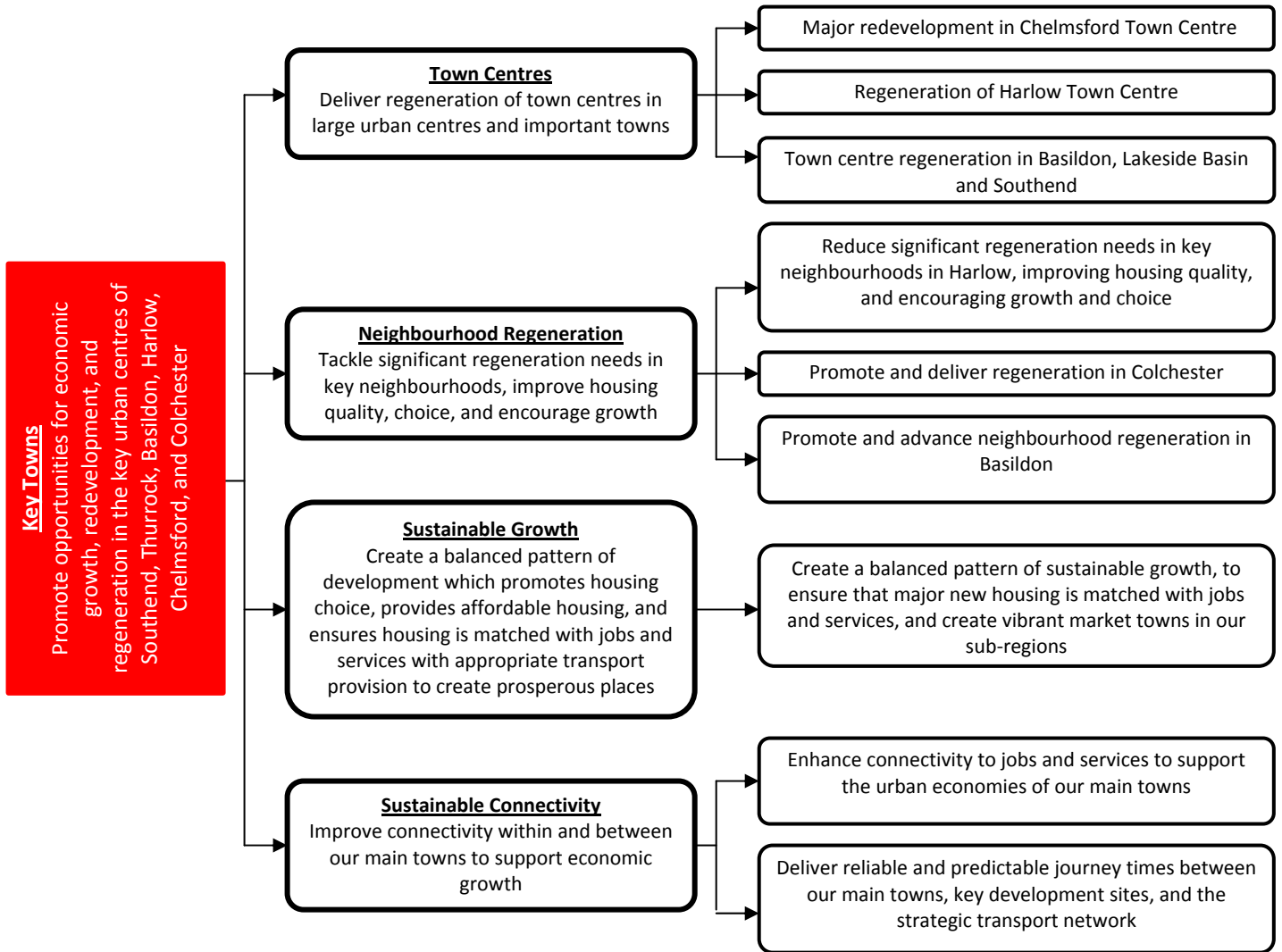


Diagram 6: Key Towns Strategic Focus Priorities

Our Strategic Focus

Priority Themes

Priority Investments



8.4 Low Carbon Energy Strategic Focus

Low Carbon Energy

Support the growth of renewable and low carbon energy as a key sector and promote the growth and location of associated industries in Greater Essex

Low carbon energy has been identified as a strategic focus for the ICS due to the opportunity this sector offers to maximise existing assets in Greater Essex, and encourage growth in a key sector that has real potential to provide large economic benefits. This sector also provides an excellent opportunity to influence issues raised through a number of ICS priority themes and investments, particularly related to skills improvements and economic development in areas of substantial need. The substantial strategic influence this overarching sector could have for Greater Essex makes it a vital component of the ICS, and a feature that requires greater attention as a strategic focus.

Greater Essex is at the centre of the world's largest market for offshore wind energy and is next to the UK's most dense area of new offshore development situated between the Humber, Greater Wash, and the Thames Estuary.

Our ports are perfectly located to support this fast growing sector. It is our imperative to promote Greater Essex as the place to invest for innovative companies in this sector. We expect that Essex will become predominant nationally in terms of the development and growth of the renewable energy sector. It therefore has to be a focus area for the ICS.

This provides a significant opportunity for Essex to nurture its renewable energy sector, as well as ensuring that our businesses are able to capitalise on the requirements of the manufacture, maintenance, and infrastructure based operations of the offshore wind farms.

With the UK's transition towards a low carbon economy, there will also be a significant opportunity for Greater Essex firms to compete in the growing markets for green technologies and low carbon energy components and products.

Before the decommissioning of Bradwell Nuclear Power Station in 2002, Greater Essex had been an important producer of the UK's low carbon electricity. As part of the Government's programme to increase the UK's production of low carbon energy, Bradwell has been put forward as a candidate site for the construction of a new nuclear power station. However, a proposal at Bradwell has yet to be brought forward by a promoter and it would have to be decided by Government. It has not been included in the ICS on that basis.

The priority investments and themes in the ICS associated with low carbon energy are listed on the following page.



Diagram 7: Low Carbon Energy Strategic Focus Priorities

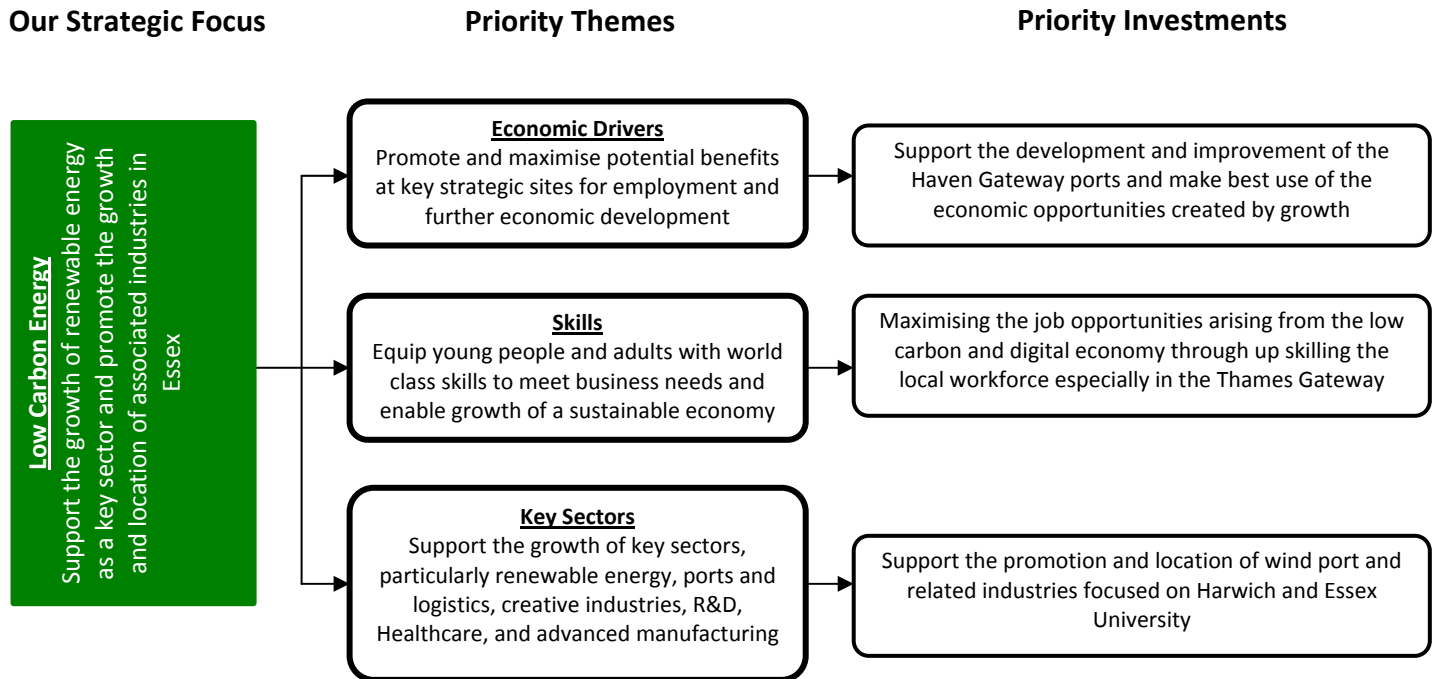
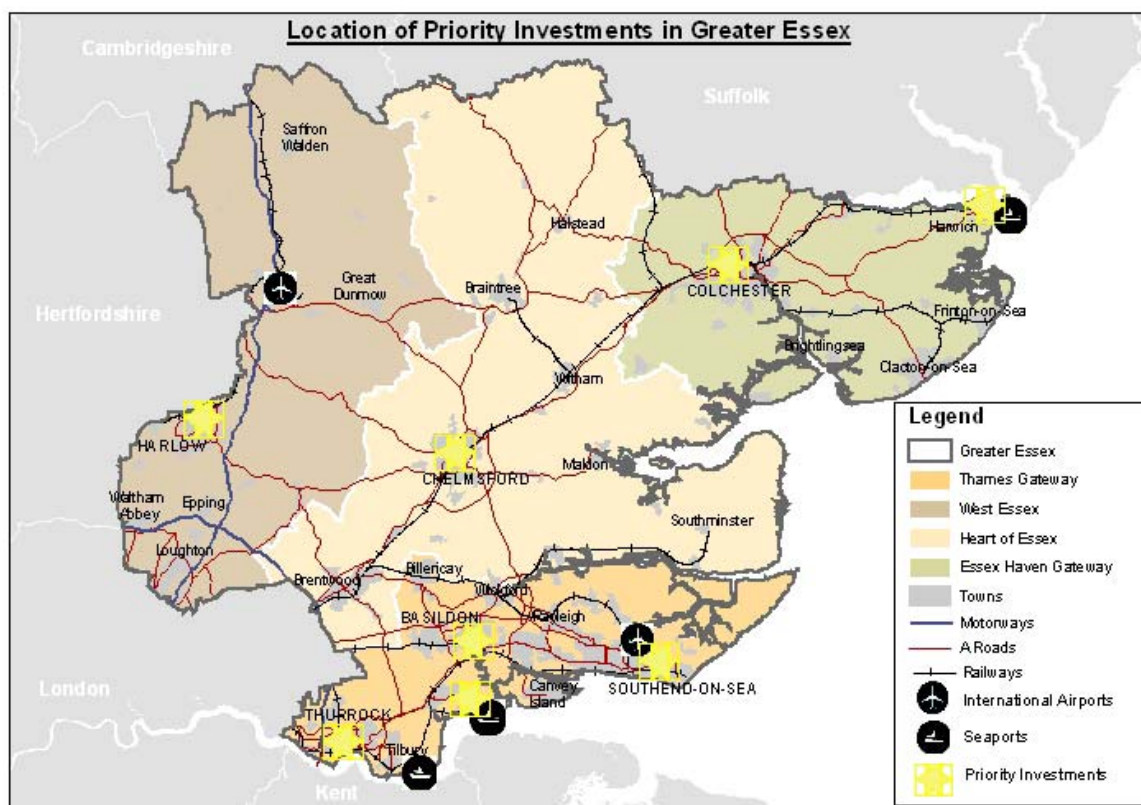


Diagram 8: Location of Priority Investments in Greater Essex



9. NEXT STEPS

Since the ICS process began at the start of 2010, there has been a change of Government and a large amount of changes to Government policy. It has not been possible to reflect many of these changes directly within the ICS. The approach taken has attempted to accept that change is occurring on an ongoing basis, particularly in relation to the amount, type, and distribution of funding available, and attempt to be in the best possible position when changes are implemented.

The next phase of the ICS will provide a better opportunity to;

- reflect on changes that have occurred in Government policy,
- review in greater detail our agreed priority investments, and consider how they will be developed into more detailed proposals that can be resourced and delivered, and

- consider how this could affect the delivery of priorities for Greater Essex.

The ICS takes a broad and long term perspective looking between 10-20 years ahead. The next stage of the ICS will be critical to many of its long term aims, providing a clear emphasis on implementation and delivery of the priorities.

The headline issues that will be considered in the next phase of the ICS are:

- How do we resource the ICS priorities?
- What do we need to do differently and where?
- What could be achieved using existing resources?
- What would an ICS investment programme look like?

- Where are the external funding opportunities?
 - Which priorities should aim for funding through the Regional Growth Fund (RGF)?
 - How do we maximise our ability to obtain EU resources?
- How can we ensure mainstream funding and capital programmes are used to deliver ICS priorities?
- What new financing models and tools are available to us (eg: Tax Increment Financing (TIF)), and how could we provide an incentive for development?
- Which interventions could provide the greatest overall benefit? (e.g., more detailed sustainability appraisal, costing and viability studies, and cost/benefit analyses could be undertaken)
- How to organise the delivery of the priority investments in terms of their timing and phasing? For example, they could be grouped into different time bands (e.g., 1-3 years, 3-5 years, and 6+ years).
- Which stakeholders will be involved in delivery?
- What are the implications for the ICS of recent policy developments – Local Growth White Paper, Localism Bill, Health White Paper etc?
- What can we learn from other areas of the UK?
- What will be the role of the Local Enterprise Partnership and sub-regional architecture in ICS delivery?

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