APPENDIX 1

Tendring Employment Land Review (ELR)

A Final Report by Hatch Regeneris and BE Group

September 2019

Tendring DC

Tendring Employment Land Review (ELR)

May 2019

www.hatchregeneris.com

Contents Page

HATCH REGENERIS

HATCH REGENERIS

Appendix H - Future Employment Demand Scenarios Method

Executive Summary

i. Hatch Regeneris and BE Group were commissioned by Tendring District Council to carry out an Employment Land Review in Tendring. This study provides an update to the 2013 Employment Land Review prepared by Regeneris and a further ELR update prepared in 2016. At the same time, Hatch Regeneris is preparing an Economic Strategy for Tendring. There are strong links between the two documents.

ii. In June 2017, the Publication Draft version of the Tendring District Local Plan was issued. Section 1 of the Local Plan covers strategic matters and has been jointly prepared by Braintree, Colchester, Essex and Tendring Councils.

iii. A Joint Examination of Section 1 of the Local Plan began in January 2018. The Inspector has confirmed that he is broadly happy with the OAN figure of 550 dpa and a requirement for between 12 and 20ha employment land up to 2033. However, further evidence is required to support proposals for the North Essex Garden Communities and the Councils are preparing this evidence with a view to resuming the Section 1 Examination in 2019. The Examination of Section 2 of the Local Plan is expected to take place in late 2019/early 2020.

iv. This Employment Land Review (ELR) has been informed by a detailed review of the policy context for Tendring at a national, regional and local level. A review of the performance of Tendring's economy and the commercial property market has also been carried out. Further information is provided in the main report.

Demand Scenarios

v. Based on Planning Practice Guidance, three approaches have been considered in the assessment of future employment land needs in Tendring to 2033. These are outlined below:

- The **Employment led scenario** is based on bespoke sectoral employment forecasts provided by Experian UK (June 2018) and informed by PBA's population projections for the district. This scenario takes account of the distortions and errors in the official population projections.

  Overall employment in Tendring is expected to increase by 5,540 FTEs for the period 2017-33, with the increase in B-use class employment amounting to 674 FTEs. Under this scenario, for the period 2017-33 it is expected that requirements for employment land will be 1.72 ha of B1a/B1b, -2.69 ha of B1c/B2 and 4.28 ha of B8 land.

- The **Labour supply** approach is based on the how the local labour force is affected by the proposed housing delivery in the district to 2033. Under this scenario, for the period 2017-33, it is anticipated that requirements for employment land will be 0.73 ha of B1a/B1b, -3.23 ha of B1c/B2 and 1.09 ha of B8 land.

- The **Past take-up** scenario is based on the delivery of employment floorspace over a five to ten-year period for which data is available. Under this scenario it is expected that requirements for employment land will be 0.3 ha of B1a/B1b, 2.6 ha of B1c/B2 and 5.8 ha of B8 land.

Supply Assessment

vi. A detailed review of the supply of employment land in Tendring has been carried out.

vii. Tendring's Emerging Local Plan identified eight employment allocation sites in the district. These have been reviewed to update their status and continued availability to the market. It is concluded there is **16.63 ha of allocated employment land available** to the open market and deliverable within the planning timeframe.

viii. In addition to the allocated employment sites, there is **27.6 ha of employment land** supply in Tendring with **outstanding planning approvals** (outline or detailed).

ix. **Other sites**, that are not allocated or have a current approval, but that may be suitable for employment land development, **amount to 53.1 ha**. Significant further investigation is required of these sites to determine their deliverability, however, they may provide longer-term potential for employment land provision.

x. All sites comprising the supply of employment land have been assessed for quality using an objective scoring system out of 100 across ten individual measures. The nature of Tendring mean that all sites are removed from the motorway network, and some from a rail station. Therefore, none of the sites are able to score full marks for strategic highway proximity and a limited number are serviced by public transport availability.

xi. Those sites to achieve relatively high scores include Stanton Europark (score 81), Lanswood Park (score 73) and Land at Brook Park West (score 73). These relatively high scores are largely accounted for by their strategic position and prominence to one of Tendring's major A-roads (A133/A120).

xii. The existing portfolio of sites has also been assessed in terms of quality using a similar scoring system. Several have been assessed as 'poor quality'. However, it is important to note that a number of these are still playing an important role in meeting the needs of occupiers undertaking lower order activities and should continue to be protected in line with the recommendations set out within this Chapter.

xiii. A small number of sites have been identified as not being suitable for continued employment use beyond the requirements of their current occupiers due to their poor quality and location. These include Harmers Foundry, Walton-on-the-Naze; SATO Site, Harwich; and Durite Works, Harwich. The latter two sites have plans attached to demolish existing premises on site for housing.

Demand-Supply Balance

xiv. The demand assessment suggests there is an overall requirement for between -1.41 ha[1] (Labour Supply scenario) and 8.7 ha (Past Completions scenario).

xv. We have some concerns over the data provided to inform the Past Completions Scenario and as such the requirement is for between -0.87 ha and 2.77 ha of land in Tendring.

xvi. In terms of supply, a total of 44.23 ha has been identified which has planning approval, comprising of the following:

[1] We have excluded the EEFM 2017 from this analysis as the population error inputs into the model mean that it cannot be relied upon and was used for comparison purposes only

- 16.63 ha of employment land allocations
- 27.6 ha of additional sites with employment land planning permission (outline or detailed)

xvii. A qualitative review of the sites comprising the total of 44.23 ha has indicated there is a reasonable prospect of these sites being developable within the planning timeframe.

xviii. In addition, the supply assessment has identified sites totalling 53.1 ha without planning approval which could potentially be developed for employment uses including some with Applications that are awaiting a decision. As these sites are not currently supported by planning they would require further investigation but may be suitable as employment sites in the longer term.

xix. In quantitative terms, at a district level, there is more than sufficient supply of land to meet future needs even if the most optimistic scenario (8.7 ha) is adopted.

xx. It is also important to consider the needs of different use classes as these will vary in terms of individual requirements and whether or not these can be met by the available supply. This is considered below:

- **Office and R&D Activities (B1a and B1b)** – Tendring should plan on the basis of ensuring that there is at least 0.73 to 1.72ha of B1a/B1b land over the period. Our assessment suggests that there is more than sufficient land available to support this use class, with around 18ha of employment land that is either allocated or has current permission for these uses. There is also estimated to be a further 15ha of land that is not currently supported by planning that may become available in the future.
- **Industrial (B1c and B2 use class)** – the scenarios suggest that there is likely to be an overall net reduction in the requirement for industrial space but a potential requirement for up to 2.6ha industrial space. Tendring will still need to ensure that some additional allocations are available to meet identified needs. Our assessment suggests that there is currently over 40 hectares of land that is either allocated or with a current planning permission for B1 and B2 uses.
- **Warehousing activities (B8 use class)** – we recommend that Tendring should plan on the basis that there will be a requirement for between 1.09 and 4.28 ha of B8 land. There is around 17.5ha of land with current planning permissions for mixed B1-B8 uses and around 15ha comprising allocations for industrial/warehousing uses. At a district level therefore, there is more than sufficient supply to cater for the maximum scenario.

Review of Employment Policies

xxi. **Policy SP4** of the Draft Tendring District Local Plan sets out how Tendring DC will provide for employment and retail. This identified a requirement for between 20ha and 38ha of employment land. Following an Examination in Public, the requirement for employment land has been reduced to between 12ha and 20ha.

xxii. Our own assessment suggests that the net additional requirement is closer to -0.87 ha and 2.77 ha. However, a figure closer to the 12-20ha figure would provide for a range of sites and choice.

xxiii. **Policy PP6** of the Draft Tendring District Local Plan sets out how the Council will protect existing employment sites. It sets out the instances when proposals for non-employment uses will be considered acceptable. The council may wish to consider the following changes:

- Alternative uses should respond to a demonstrable need
- Consider incorporating a time period over which the site should demonstrate that it has been marketed such as 1-2 years

xxiv. **Policy PP7** of the Draft Tendring District Local Plan identifies a number of employment allocations which can support future employment growth. These are summarised below along with our recommendations on which sites should be protected. This suggests that there is potential for between 13.33 and 15.33 ha of land to support future employment growth.

Name of Site	Local Plan allocation (ha)	Potential growth beyond 2033	Our Recommendation
Land West of Carless Refinery, Parkeston	4.5 ha	0ha	Site should be excluded. The site is likely to be required as an extension to the refinery and will not be available to the open market for B class uses.
Stanton Europark, Parkeston	2-4 ha	0 ha	It is recommended that this site is protected
Tendring Colchester Borders Garden Community	6 ha	4 – 24 ha	This site may be appropriate but due to the early stage of the proposals, the quantum has not been assessed.
Mercedes Site, Harwich	3 ha	4.4 ha	It is recommended that this site is protected
South of Thorpe Road, Weeley	1 ha	0 ha	It is recommended that this site is protected
Land South of Long Road, Mistley	2 ha	0 ha	There are several issues with this site and it is recommended that the site is considered for potential release.
EDME Maltings, Mistley	0.13 ha	9 ha	It is recommended that part of the site is protected.
Lanswood Park, Elmstead Market	1.2 ha	0 ha	It is recommended that this site is protected
Total	**19.83 - 21.8 ha**	**8.4 – 28.4 ha**	
Total to be protected	**13.33 - 15.33 ha**	**8.4 – 28.4 ha**	Nb this includes Tendring Colchester Borders even though exact quantum is unknown

2. Introduction

Overview of Study

2.1 Hatch Regeneris and BE Group have been commissioned by Tendring District Council to carry out an Employment Land Review in Tendring. This study will provide an update to the 2013 Employment Land Review prepared by Regeneris and a further ELR update prepared in 2016[2]. At the same time, Hatch Regeneris is preparing an Economic Strategy for Tendring. There will be strong links between the two documents.

2.2 In June 2017, the Publication Draft version of the Tendring District Local Plan was issued. Section 1 of the Local Plan covers strategic matters and has been jointly prepared by Braintree, Colchester, Essex and Tendring Councils.

2.3 A joint Examination of Part 1 of the Local Plan began in January 2018. The Inspector has confirmed that he is broadly happy with the strategic direction of the Local Plan, supporting an OAN figure of 550 dpa and a requirement for between 12 and 20ha employment land. However, further evidence is required to support proposals for the North Essex Garden Communities. The Examination of Section 2 of the Local Plan is expected to take place in late 2019/early 2020.

2.4 In preparing for the Examination of Section 2, Tendring Council has identified areas where modifications might be needed to address certain issues. The need to review these policies arises from:

- the need to provide the most up-to date evidence to the Planning Inspector as part of the Examination;
- to take account of changes in national and local planning and economic development policy;
- the need to align the objectives of the Economic Strategy and the Local Plan to provide a joined-up approach to development within Tendring;
- questions raised by the Planning Inspector during the Section 1 Examination in respect of the economic objectives and employment land requirements for Tendring and the split between land to be delivered as part of the new garden communities and other locations in the district;
- changes in the planning status of certain employment sites which ought to be reflected within the policies of the Local Plan;
- objections to the wording of the economic and employment policies and the way in which they balance the requirements to protect employment land with the need to maintain flexible supply of opportunities in line with the National Planning Policy Framework (NPPF); and
- limited evidence, at present, on the deliverability of employment land as part of the larger mixed-use allocations in the Local Plan and economic opportunities within defined priority areas for regeneration.

2.5 The Council has drafted potential modifications to the Local Plan in response to a number of these issues, but these require scrutiny to ensure they reflect the most up to date available evidence and provide the most appropriate way to proceed.

[2] Employment Land Review Tendring, Aspinall Verdi (May 2016)

2.6 Following the EiP of Section 1 of the Local Plan and leading up to the EiP of Section 2 a robust and up to date evidence base is required that responds to the questions raised by the Planning Inspector together with objections received to date.

Report Structure

2.7 The remainder of this report is set out under the following headings:

- Section 2: Defining the Functional Economic Market Area (FEMA) – sets out the evidence on the FEMA for the area of North Essex, which includes Tendring, Braintree, Chelmsford and Colchester. This is the same as the housing market area identified in the Objectively Assessed Housing Need study.
- Section 3: Policy Context – sets out key socio-economic and planning policy relevant at the national, regional and local level.
- Section 4: Tendring Economy – provides an overview of the key socio-economic indicators, which helps to build a clear picture of the current situation in the Tendring economy and its past performance.
- Section 5: Commercial Property Market Assessment – provides an overview of the current position and past market trends in commercial development.
- Section 6: Future Growth Scenarios – draws on evidence from past take up of floorspace and land, employment forecast data and labour supply projections based on housing trajectory to provide a set of growth scenarios for Tendring. It translates these scenarios into implied floorspace and land requirements.
- Section 7: Supply Assessment – summarises the supply position in terms of available employment land for Tendring.
- Section 8: Demand-Supply Balance – provides assessment of the future demand for employment land and its supply.
- Section 9: Conclusions – provides conclusions and recommendations for Tendring District.

3. Defining the Functional Economic Market Area (FEMA)

Introduction

3.1 The first step in undertaking a review of the economy for the Tendring District is to identify the functional economic market area (FEMA) for the study area. This allows for employment growth and resulting employment land needs to be considered across a more realistic geography than that presented by looking at districts in isolation.

3.2 There is no standard approach or data source to define a FEMA, and government guidance suggests the use of a range of indicators. The Planning Practice Guidance (PPG revised in 2015 offers the following advice on defining a FEMA:

The geography of commercial property markets should be thought of in terms of the requirements of the market in terms of the location of premises, and the spatial factors used in analysing demand and supply – often referred to as the functional economic market area. Since patterns of economic activity vary from place to place, there is no standard approach to defining a functional economic market area, however, it is possible to define them taking account of factors including:

- *extent of any Local Enterprise Partnership within the area;*
- *travel to work areas;*
- *housing market area;*
- *flow of goods, services and information within the local economy;*
- *service market for consumers;*
- *administrative area;*
- *catchment areas of facilities providing cultural and social well-being;*
- *transport network.*

Source: Planning Practice Guidance, CLG, 2016

Methodology

3.3 In assessing the FEMA for Tendring we have collated and analysed data from across a number of indicators presented above. As there is no one source for defining the FEMA we have assessed these datasets in the round. Importantly, a key component in defining a locality's FEMA is the evidence and findings used to define the housing market area (HMA). This includes commuting patterns, house prices and migration trends. The analysis of the HMA draws on the HMA identified in the Objectively Assessed Housing Need study (November 2016 update)[3].

3.4 The indicators set out in the PPG to inform the FEMA vary in the amount of data available and are not always up-to-date or prepared on a consistent basis. We have given a degree of weight to each indicator according to the quality of the data. We consider the travel to work, migration and house price data to be the most reliable and robust, given that they are based on consistent and up-to-date data. Data on the flow of goods, services and

[3] Objectively Assessed Housing Need study (November 2016 update) for Braintree District Council, Chelmsford City Council, Colchester Borough Council, Tendring District Council

information (i.e. business flows) and transport connectivity is less useful due to data gaps and a lack of consistency in data collection.

3.5 The data and evidence sources used in identifying the FEMA for Tendring include the following:

Indicator	Method / Source	Weight
Travel to work areas	Travel to work areas (Census 2011) Detailed commuting patterns (Census 2011)	✓✓✓
Housing market area	SHMA (2015 and 2016) Migration House prices	✓✓✓
Local Enterprise Partnership (LEP)	South East LEP	✓✓
Administrative area	Essex County Council	✓
Flow of goods and services	Business flows – (2013 Business Survey)	✓
Service market for consumers	Comparison spend retail flows (Retail Study 2016)	✓✓
Transport network	Road and rail connectivity	✓

Weight given to data: ✓ = weak ✓✓ = medium ✓✓✓ = strong

Travel to Work Areas

3.6 Travel to work data from the 2011 Census highlights the significant commuting flows between Tendring and Colchester. Based on the data in the below table, this is clearly a key connection. There are smaller links between Tendring and other districts in North Essex such as Braintree and Chelmsford.

3.7 Around 26,100 people live and work in the district, resulting in an overall self-containment rate of around 60% (the proportion of those who live in Tendring who also work there). While this is relatively high, the district also experiences a daily net outflow of commuters of around 10,400 people. Almost half of this net outflow is made up of people commuting to Colchester.

Table 3.1 Key Commuting Flows to and From Tendring, 2011

	In Commuting to Tendring	Out commuting from Tendring	Net Commuting
Tendring	26,100	26,100	0
Basildon	0	200	-200
Braintree	400	800	-400
Brentwood	0	100	-100
Castle Point	0	0	0
Chelmsford	100	700	-600
Colchester	3,800	8,700	-4,900
Epping Forest	0	100	-100
Harlow	0	0	0
Maldon	100	200	-100
Rochford	0	0	0
Southend-on-Sea	0	100	-100
Thurrock	0	100	-100
Uttlesford	200	300	-100
London	*200*	*2,500*	*-2,300*
Total (excluding Tendring)	6,800	17,200	-10,400

Source: ONS Census, 2011

Implications for the Functional Economic Market Area

- Significant out commuting flows from Tendring to Colchester, with smaller flows to Braintree and Chelmsford. There is a similar picture for in commuting.
- Over half of the commuting flows to and from Tendring involve Colchester.

This suggests that there are strong links with North Essex.

HMA

3.8 The recently-updated (2016) Objectively Assessed Housing Need Study for Braintree, Chelmsford, Colchester and Tendring defines a housing market area (HMA) as the four districts. The report notes that "an HMA is an area of search, bringing together places which share similar household characteristics."

Migration

3.9 Paragraph 11 of the PPG states that analysis of migration flow patterns can be used to identify the areas within which a relatively high proportion of household moves are contained. It suggests a threshold of 70% for an area to be considered a self-contained housing market area.

3.10 Data from the 2011 census shows that in the 12 months leading to the census, there were around 8,300 internal moves within the district. This represents 64% of total moves by people originating in Tendring. The below table lists the migration flows into and out of Tendring from the other local authorities identified as being part of the HMA by the OAHN report. It shows strong migration flows between Tendring and Colchester, while there is some migration between Tendring and Braintree and Chelmsford.

3.11 The migration figures outlined in the below table show that the identified HMA reaches the PPG's suggested threshold of 70% self-containment. As shown, 73% of moves to Tendring came from within the HMA and 76% of moves originating in Tendring stayed within the HMA.

Table 3.2 Migration Flows between Tendring and Surrounding Local Authorities

	In migration to Tendring	Out migration from Tendring	Net migration		
	No.	% of total	No.	% of total	
Moves within Tendring	8,300	64%	8,300	65%	-
Braintree	200	2%	200	2%	0
Chelmsford	100	1%	100	1%	0
Colchester	900	7%	1,100	9%	-200
Flows within HMA identified in OAHN Study	9,500	73%	9,700	76%	-200

Source: ONS Census, 2011

House Prices

3.12 Based on ONS data, the median house price in Tendring in 2016 Q3 was £183,000. There are significant differences in house prices across the four districts identified as the HMA. Tendring is the district with the lowest median house price, while Chelmsford has a median house price of over £100,000 more than Tendring's.

Table 3.3 Median House Prices in Tendring and Surrounding Districts, 2016 Q3

	Median House Price
Tendring	£183,000
Braintree	£250,000
Chelmsford	£295,500
Colchester	£230,000

Implication for the Functional Economic Area

- The OAHN study identifies an HMA, which is also a plausible FEMA for Tendring. This includes Braintree, Chelmsford, Colchester and Tendring.
- There are strong links between Tendring and its surrounding districts in terms of migration. The HMA identified in the OAHN study reaches the PPG threshold of 70% self-containment rate.
- Median house prices are slightly lower in Tendring compared to the surrounding districts.

South East LEP and Essex CC

3.13 Tendring is located within the administrative boundary of the Essex County Council as well as the South East Local Enterprise Partnership (LEP). The South East LEP is a strategic body bringing together the public and private sectors from across Essex, Kent and East Sussex to support economic growth, and has a number of federated local boards based on different geographical areas.

3.14 The South East LEP has recently released a new Strategic Economic Plan for the area. This sets out three aims, to work smarter to increase productivity, to deliver faster by accelerating housing and infrastructure delivery, and to work better together by collaborating across the South East. One of the priorities to deliver this success is to create exciting places by putting the area's towns, cities and rural communities on the front foot in supporting quality of life, quality of space and supporting business's role in the future.

3.15 The Essex County Council Economic Plan also identifies the A120 corridor as a priority.

Implications for the Functional Economic Area

- Both the South East LEP and Essex County Council identify the importance of the A120 corridor, showing the linkages within north Essex.

Flow of Goods and Services

3.16 A business survey was carried out in Tendring in 2013, with 570 businesses questioned. The survey did not specifically ask businesses where their main markets are located. However, 89% of businesses reported that proximity to suppliers was one of the key factors influencing their location decision, while 92% said proximity to customers.

3.17 A retail survey of 1,000 residents of Tendring was undertaken in 2015, with the results published in the Tendring Retail Study 2016. The area was broken down into seven zones. From zone 1 to zone 7 these were Frinton & Walton; Clacton; Harwich; Manningtree & Brightlingsea; Wivenhoe; Colchester; and Babergh. The first four zones are in Tendring, while the other three are in the wider sub region.

3.18 The survey found that, with the exception of Manningtree & Brightlingsea, residents within Tendring district tended to carry out their main food shopping in Tendring (around 95% of respondents from zones 1, 2 and 3 said that their main food shopping destination was in Tendring). On the other hand, very few residents from outside the Tendring study area said Tendring was their main food shopping destination.

3.19 The picture is similar in terms of comparison expenditure retention, with a lot of the expenditure from zones 1 to 3 being retained in Tendring. While a large proportion of residents from Manningtree & Brightlingsea travel to Colchester for comparison shopping trips.

3.20 These studies could indicate that markets in Tendring are fairly self-contained. However, there are some linkages with other locations such as Colchester.

Transport Network

3.21 There are two key strategic roads within Tendring. These are the A120 and A133.

3.22 The South East LEP Strategic Economic Plan which is currently being refreshed identifies the area around the A120 as a key investment area. It provides a route from Harwich on the East coast, through Colchester and Braintree and across to Bishops Stortford and Stansted Airport. This route is used extensively for both commuting and business transport and sometimes travellers experience delays.

3.23 The A133 runs from Clacton-on-Sea into Colchester and also joins up with the A120 near Frating Green. It is used often by travellers between Tendring and Colchester, and also those heading to the University of Essex Colchester campus.

The FEMA

3.24 The analysis presented above shows that there are a number of clear relationships between Tendring District and its surrounding area.

- Tendring sees **strong commuting flows** both to and from Colchester. There is limited commuting between Tendring and other districts, but there is some with Braintree and Chelmsford.
- The recently-updated Objectively Assessed Housing Need Study identified a housing market area of Braintree, Chelmsford, Colchester and Tendring.
- Data from the ONS shows **strong migration flows** between Tendring, Braintree, Chelmsford and Colchester. The self-containment rate in this area is over 70%, the threshold suggested by PPG for a housing market area.
- Median house prices in Tendring are **slightly lower** than those in Braintree, Chelmsford and Colchester.
- The South East LEP SEP identifies the **A120** as a key investment area within the LEP. This area covers much of North Tendring, while also covering Colchester and Braintree. This area is also identified as a priority in the Essex County Council Economic Plan.

- Much of Tendring's retail expenditure is retained within the district. However, there is a significant proportion of Tendring residents that travel to Colchester for comparison shopping.
- The transport network (via road and rail) **connects centres within Tendring District to surrounding centres** including Braintree, Colchester and other locations along the A120.

3.25 Given this assessment and the weighting identified above (in paragraph 2.5), the report identifies the following districts as forming part of Tendring's functional economic market area:

- Tendring
- Braintree
- Chelmsford
- Colchester

3.26 This report will focus on the employment needs for Tendring alone but there will continue to be ongoing discussions with the remaining districts within the HMA to ensure that any needs across this area are met.

4. Policy Context

Summary

- National, regional and local policy guides the context in which economic development and planning takes place.
- At the regional-level, the South East LEP's Strategic Economic Plan sets out the LEP's ambition to create 200,000 new jobs and construct 100,000 new homes, while also leveraging £10 billion of inward investment.
- The SEP identifies the A120 corridor as one of the growth corridors across the South LEP area. There were plans for 28,000 new jobs and 31,000 new homes in the area. The SEP outlines a number of sectors that it sees as investment opportunities for the area. The Essex County Council Economic Plan also identifies the A120 corridor as a key area for growth within the county.
- Within the region, there are a number of strategies related to the energy sector. Energy South2East is developing an energy strategy for the Coast to Capital, Enterprise M3 and South East LEPs with a view to securing funding from government. The North Essex Energy Group came together to better understand the challenges and opportunities facing the energy sector and establish some recommendations on how to support the local energy sector further.
- The 2013 Employment Land Review for Tendring found that there was enough additional land to cover potential future demand for employment land up until 2032.
- The Draft Local Plan identifies the need for 20-38 Ha of additional employment space in Tendring and 58-137.1 Ha in North Essex by 2033.

National

4.1 The Government has produced the National Planning Policy Framework, which sets out its planning policies for England and how it expects them to be applied. The NPPF discusses factors that must be considered in the preparation of local and neighbourhood plans with the aim of helping to achieve economic growth.

4.2 Government has also produced Planning Practice Guidance across a range of planning areas. This accompanies the NPPF and it sets out guidance for carrying out economic demand needs assessments.

4.3 The Industrial Strategy focuses on supporting the UK economy to become more productive and to drive stronger, more balanced growth. It argues that there are five foundations of productivity growth: ideas, people, business environment, infrastructure and places; and that there are four grand challenges: Artificial Intelligence (AI) and the data economy, future of mobility, ageing society and clean growth.

South East LEP and Essex

South East LEP Emerging Strategic Economic Plan (2019)

4.4 The South East LEP Strategic Economic Plan (SEP) was published in 2014, covering East Sussex, Essex, Kent, Medway, Thurrock and Southend. This is currently being refreshed, with a new SEP expected to be launched in early 2019. This refreshed SEP presents a number of priorities which are needed to create the conditions for growth. These include:

- Creating ideas and enterprise to create a 'smarter' economy.

- Developing tomorrow's workforce to deliver productivity gains.
- Accelerating infrastructure delivery to support future growth.
- Creating places which improve living standards and create communities to which residents and businesses aspire.
- Working together with London and other parts of the Greater South East to deliver economic growth together.

4.5 The SEP identified the A120 corridor as a key investment area within the South East LEP area. This area includes much of north Tendring including Harwich port. They see a number of investment opportunities in sectors such as environmental technologies & energy; life sciences & healthcare; advanced manufacturing; creative, cultural & the visitor economy; and logistics.

4.6 The South East LEP are currently in the process of updating their SEP and have not yet produced a Local Industrial Strategy.

Energy South2East

4.7 The Coast to Capital, Enterprise M3 and South East LEPs are working together to create a Local Energy Strategy for the south east. It aims to drive forward local energy initiatives at a scale which will help transform the energy ecosystem, support the growth of the local carbon economy and enable significant carbon emissions savings. The full strategy is expected to be launched in March 2019, alongside an action plan detailing short, medium and long term initiatives to develop projects, pilot schemes and the sharing of best practice. The emerging strategy identifies Tendring as having the smallest emissions reduction of any local authority in the tri-LEP area over the last the last ten years, falling by 22% compared to an average of 31%.

Economic Plan for Essex

4.8 The Economic Plan for Essex was published in 2014 and outlines plans to enable over 117,000 new jobs and over 81,000 new homes by 2021. The plan mainly focuses on improving skills across the Essex workforce, particularly by closing the skills gap; £1bn of infrastructure investments in four strategic growth corridors, including the A120; and enhancing productivity within the Essex economy, focusing support on five growth sectors.

4.9 The five key growth sectors considered in the Economic Plan are advanced manufacturing, low carbon & renewables, logistics, life sciences & healthcare and digital, cultural & creative.

4.10 For Tendring, the Economic Plan sees similar investment opportunities to those outlined in the South East LEP SEP.

Essex Employment and Skills Board

4.11 The Essex Employment and Skills Board (ESB) was established due to a mismatch between skills acquired by the workforce and skills required in Essex. The Board works with large employers, academic institutions, SMEs and local government to solve the skills challenges many industries face. They also look to support people into training opportunities to develop their career.

4.12 They identify seven priority sectors which are set for growth and are suffering from skill shortages: advanced manufacturing and engineering, care, construction, financial & related services, health, IT, digital & creative, and logistics.

North Essex

Economic Vision and Strategy for the North Essex Sub-Region

4.13 In January 2017, a group was set up to deliver three garden communities in North Essex. These are expected to be located at West of Braintree, Colchester-Braintree Borders and Tendring-Colchester Borders. An economic vision and strategy was required to shape the area's economic, social and environmental development over the coming decades. There are plans that, in the long-term, the three garden communities will house approximately 120,000 people and provide 43,000 jobs. The document identifies a range of strategic opportunities, including links to Stansted Airport and the University of Essex. The report discusses some opportunities for supporting the development of the sub-region. These include nuclear energy projects; renewable energy; expansion of University of Essex and university-business partnerships; London-Stansted corridor; and other opportunities in the Greater South East

North Essex Energy Group

4.14 The North Essex Energy Group is a partnership between the North Essex authorities, the Haven Gateway Partnership, Hutchinson Ports, University of Essex and Colchester Institute. In late 2017, a workshop was convened amongst these partners to understand the strategic priorities in the energy, renewables and wider low carbon sectors for North Essex. The discussion was intended to understand the challenges and opportunities for the energy sector in North Essex, to explore the options for unlocking local growth and to develop a clear roadmap for collective action. The report developed eight recommendations:

- Change the language from energy and low carbon to engineering, construction and manufacturing.
- Raise awareness of new opportunities and routes to secure new business.
- There is a need for strategic business health check and support to map capability.
- There is a need for investment funding and helping businesses to navigate the complex support landscape.
- Strengthen regional proposition for inward investment.
- There is a need for investment in supporting infrastructure.
- Skills & training support must align to industrial need across the supply chain.
- Proactive planning and investment to secure major projects.

Tendring

Tendring Economic Strategy

4.15 The most recent Economic Strategy in Tendring was published alongside an Employment Land Review in 2013 and was also undertaken by Hatch Regeneris This is also being updated alongside this Employment Land Review. The 2019 strategy has been updated to focus on the following 5 objectives, which are similar to the previous strategy:

- Supporting Tendring's growth locations, with initial target locations of Clacton & Jaywick, Harwich & Dovercourt and the Tendring / Colchester border

- Targeting growth sectors including clean energy and care & assisted living in addition to a range of wider sector opportunities
- Ensuring residents have the skills and information to participate in the opportunities promoted in the strategy
- Support growth and innovation within Tendring's business base
- Delivering housing to support economic objectives

Tendring Employment Land Review (2013)

4.16 An Employment Land Review in Tendring was undertaken in 2013 by Regeneris Consulting Ltd. The report concluded there would be an overall requirement for between 2.3 ha and 7.1 Ha of employment land over the period up to 2029. In terms of supply, it identified 30.75 ha of employment land consisting of available land on existing sites and outstanding planning permissions suggesting that in quantitative terms there was sufficient overall supply. When analysing supply and demand of individual B-use Classes, the Review concluded there was sufficient land to meet the requirements for B1a/B1b and B1c/B2 uses and that modest additional land may be required at a local level to address quality issues in relation to B8 land. The review noted that the majority of existing available sites were located in Clacton or Harwich.

Tendring Employment Land Review (2016)

4.17 A further review of employment land was undertaken in 2016 by Aspinall Verdi on behalf of the District Council. The Aspinall Verdi Review refers to the 2013 Regeneris Review as follows: '*The 2013 Employment Land Review estimated a total requirement of 7.1 ha additional employment land over the Plan period up to 2032 on top of 30.75 ha identified*' The Aspinall Verdi Review goes on to suggest that on this basis, a total of 38 Ha of land is required to meet future employment needs, and that with an identified supply of around 25 Ha there is a shortfall of around 13 Ha.

4.18 The Aspinall Verdi Review incorrectly interpreted the 2013 Review in terms of future employment land requirements. The correct interpretation is that a requirement for 7.1 ha of employment land was identified under the high growth scenario for which there is more than sufficient land (30.75 ha) available to meet this need.

4.19 The requirement for 38 ha identified by Aspinall Verdi was published in the draft Local Plan as the 'higher range' employment land figure. However, the misinterpretation of the 2013 Review was acknowledged during the recent EiP of the Local Plan (see below for further details in relation to the EiP).

Tendring Employment Land and Floorspace Aligned with the November 2016 OAN

4.20 In May 2017 Peter Brett Associates (PBA) provided analysis of the required change in B-use floorspace 2014-2036 based on how much employment land and floorspace would be needed to accommodate the jobs needed to align with the OAN population. In order to do this, PBA commissioned Experian to produce an employment forecast scenario based on their most up to date forecasts at that time (September 2016) in combination with District's OAN population, which was estimated by PBA in November 2016. This was based on a requirement for 550 dwellings per annum. This differs from Experian's standard baseline employment forecasts which typically rely on Sub-National-Population-Projections as an input.

4.21 Based on these employment forecasts, PBA concluded that for Tendring, the anticipated jobs growth between 2014-2036 translated to 46,802 sq m of B use class employment floorspace.

4.22 Through the EiP process, PBA have subsequently advised the Council that based on a standard plot ratio of 40% this would result in a requirement for 12 ha. However, it was also acknowledged that this estimate does not account for market choice, frictional vacancy or making good losses and that this would need to be explored in more detail in any subsequent Employment Land Reviews.

Tendring Local Plan

4.23 The Draft Tendring District Local Plan was submitted in 2017 and covers the period up to 2033. Due to strategic cross-boundary policies and allocations, section 1 of the plan also includes North Essex.

4.24 In terms of the discussion on employment space provision, the Plan acknowledges opportunities for Tendring to develop strengths in offshore wind and in care & assisted living.

4.25 The document suggests that there will be annual employment growth of 490 jobs in Tendring. The analysis suggests that there is a requirement for the provision of between 20 and 38 Ha of additional B use employment land in Tendring between 2016 and 2033. The Plan suggests that there will be a need for between 65 and 137.1 Ha of B use employment land across the whole of north Essex (including Braintree and Colchester).

4.26 The Plan outlines five strategic principles that will underpin the approach to economic growth across North Essex. They are:

- Sufficient land, premises and other provision will be identified to support the achievement of minimum job numbers.
- Priority will be given to use of previously-developed land in appropriate locations.
- Existing and allocated employment sites will be safeguarded for employment use unless there is no reasonable prospect of it being used for that purpose.
- Town and city centres are the appropriate locations for new office development.
- Employment development will be a key component of the new garden communities.

Proposed Modifications to the Local Plan

4.27 Tendring District Council submitted their Local Plan to the Secretary of State on 9th October 2017. The Examination of Section 1 of the Local Plan took place in January 2018.

4.28 During the EiP, the inspector asked Tendring DC to confirm the source of their employment land figures set out in Policy SP4 of the submitted Local Plan (20 ha (baseline scenario) to 38 ha (higher growth scenario)). In responding to this, Tendring noted the error in their use of the evidence base documents in relation to the Aspinall Verdi 2016 Review (see para 3.22 above).

4.29 In order to address the error in the submitted Local Plan, Tending DC are proposing a modification to Policy SP4:

'*In order to meet the needs of the three authorities' employment land requirements for the period 2016-2033 for B class employment uses and maintain appropriate flexibility in provision, the ranges set out below will be required. Site specific employment allocations for each local authority are set out in each authority's Section 2 of their Local Plan*'.

4.30 For Tendring, the proposed modification is to adjust the employment land requirement from the published figures of 20ha to 38 ha to 12 ha to 20 ha. According to Tendring DC, the lower figure (12 ha) is based on the PBA study (see para 3.24) above and represents the minimum amount of employment land required to align with the District's OAN population. The upper figure (20 ha) reflects the 19.83-21.8 ha of employment land allocated within Policy PP7 in section 2 of the Plan for Tendring.

4.31 The Inspector has confirmed that he is broadly happy with the OAN figure of 550 dpa and a requirement for between 12ha and 20ha employment land. However, further evidence is required to support proposals for the North Essex Garden Communities.

5. Tendring Economy: An Overview

Summary

- There are around 40,500 jobs in the Tendring district, representing around 7% of all employment in Essex. This number grew by 7% in the five years leading up to 2016.
- The district is also home to around 5,200 businesses, representing around 7% of businesses in Essex. In the period between 2012 and 2017, this number grew by 11%.
- Tendring's labour market performs slightly worse than the national average with around 76% of working-age residents classed as economically active. Unemployment is slightly higher in Tendring compared to England, particularly for males.
- The largest sectors in terms of employment in Tendring are retail, health and care, tourism and education.
- A number of key sectors have been identified as important to the area through local policy, LEP policy and current sector strengths. These sectors are ports and logistics, tourism, health and care and low carbon activities. These sectors have been examined in more detail.
- Enterprise data shows relatively low start-up rates in Tendring. However, there are also low business closure rates and high survival rates in Tendring.

5.1 This section sets out the main characteristics of the Tendring economy. This will cover:

- Size of Tendring economy
- Recent economic performance
- Labour market
- Broad sectoral composition
- Sector strengths
- Business base
- Enterprise

Size of the Tendring District Economy

5.2 According to data from the Business Register and Employment Survey for 2016, there are around 40,500 people in employment in Tendring. This represents around 7% of the total jobs in Essex. The main areas of employment in Tendring are Clacton-on-Sea, with around 14,500 jobs, and Harwich and Dovercourt, with around 6,000 jobs. The total number of jobs in Tendring increased by 7% between 2011 and 2016.

5.3 There are around 5,200 businesses located in Tendring, according to UK Business Count data from 2017. This number has grown by 11% since 2012, which is significantly slower than business growth in Essex, the South East LEP and England. Again, a large proportion of these businesses are located in Clacton-on-Sea.

5.4 In terms of gross value added (GVA), the Tendring economy was worth £4.3 billion in 2015. This represents a GVA per FTE worker of around £48,700. This is comparable to productivity levels in Essex and the South East LEP but is significantly lower than the national GVA per FTE worker of £63,700.

Table 5.1 Summary of the Tendring Economy

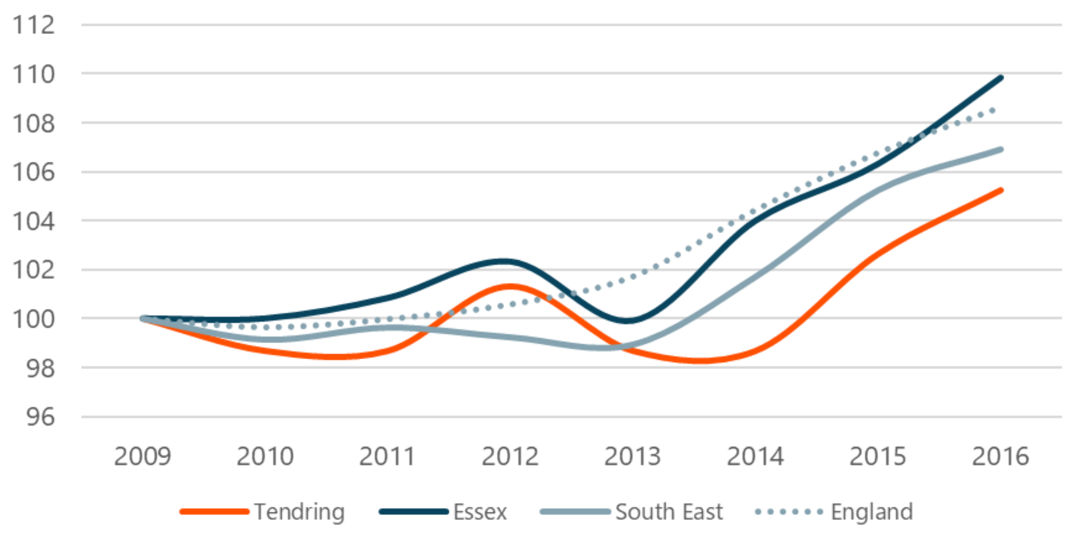
	Tendring	Essex	South East LEP	England
No. of jobs, 2016	40,500	595,500	1,637,000	26,400,000
Employment change (2011-16)	+7%	+7%	+9%	+9%
No. of businesses, 2017	5,200	72,100	195,000	2,696,000
Business change (2012-17)	+11%	+17%	+18%	+22%
GVA, 2015	£4.3bn	£63.3bn	£171.6bn	£3809.3bn
GVA *per FTE worker*	48,700	48,400	46,600	63,700
Productivity growth (2010-15)	+5%	+8%	+9%	+10%

Source: BRES, 2009-16, UK Business Count, 2010-17

Recent Economic Performance

5.5 Tendring's performance over recent years in terms of employment has been mixed, with growth since 2009 tending to lag behind Essex, the South East LEP and England. Tendring particularly struggled in 2013 and 2014, where employment growth was flat, while growth in the comparator areas was strong. However, between 2014 and 2016, employment grew by 6.5% in Tendring, which was faster in the comparator areas. However, from the 2009 base, employment growth is still lagging behind in Tendring.

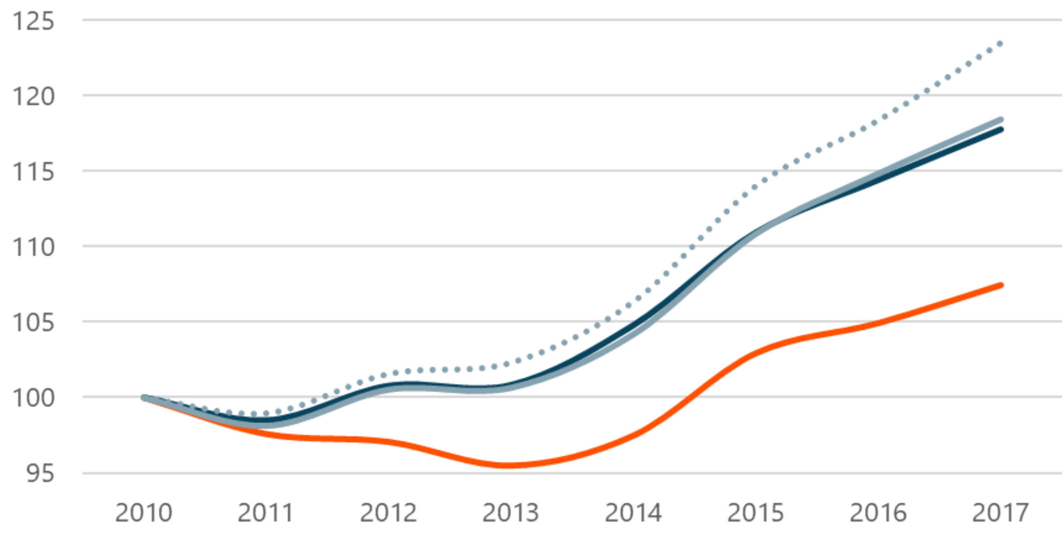
Figure 5.1 Employment Change, 2009-2016



Source: Business Register and Employment Survey, 2009-2016

5.6 Business growth has tended to be slow in Tendring over recent years. Between 2010 and 2013, business numbers fell in the district, while they rose slightly in the comparator areas. Business numbers only returned to their 2010 levels in 2015. Over the period from 2010 to 2017, business numbers in Tendring grew by 7%, compared to 18% in Essex, 18% in the South East LEP and 23% in England.

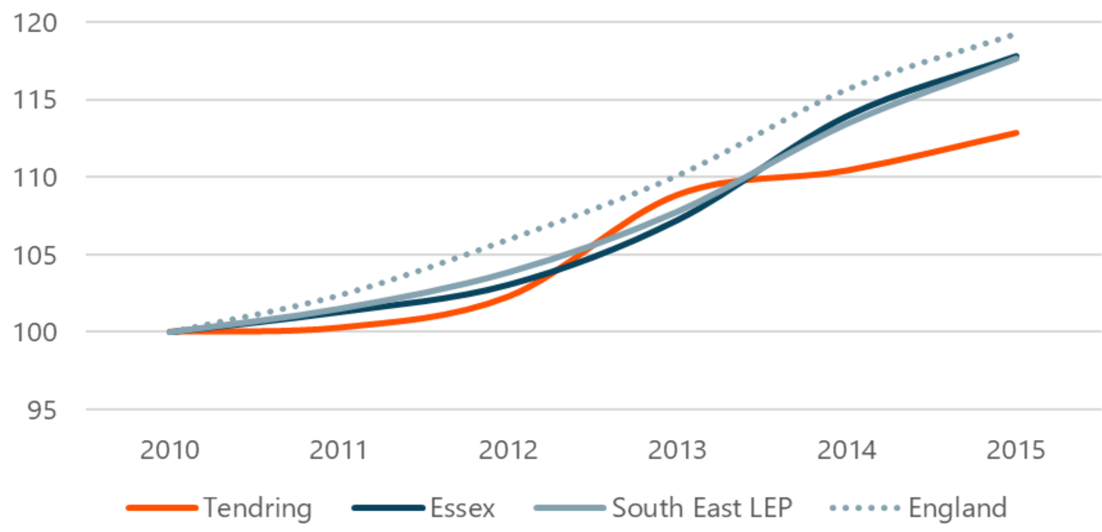
Figure 5.2 Business Numbers Change, 2010-2017



Source: UK Business Count, 2010-2017

5.7 GVA growth in Tendring tended to keep pace with the comparator areas up until 2013. However, between 2013 and 2015, GVA grew at a slower rate relative to the comparator areas.

Figure 5.3 GVA Change, 2010-2015



Source: ONS Regional Accounts, 2010-2015

5.8 In terms of GVA per FTE, Tendring saw an increase of 5% between 2010 and 2015. This productivity growth was slower than that seen in Essex, the South East LEP and England.

Labour Market

5.9 According to mid-year population estimates in 2017, Tendring has a resident population of around 145,000 people. This is around 10% of Essex's total population. However, Tendring has a relatively small proportion of its population who are of working age. Only 54% of

HATCH REGENERIS

residents are aged between 16 and 64, compared to 63% nationally. There is also a low share of residents (16%) aged under 16, compared to 19% in England.

5.10 Conversely, Tendring has a high proportion of residents aged 65 or over. 29% of residents fit into this age group. This compares to 18% in England. The age group between 65 and 74 years is particularly common in Tendring. This demographic composition of Tendring has become starker over the past decade. Since 2008, the working-age population has fallen in size, while the elder population has increased by 15%.

5.11 In general, Tendring's society is older than England's and has a relatively high dependency ratio, which could act as a constraint on the economy.

5.12 Data from the Annual Population Survey in 2017 suggests that Tendring has around 56,000 economically active residents, representing 76% of the working-age population. This is a slightly lower economic activity rate compared to Essex (81%), the South East LEP (80%) and England (79%).

5.13 The employment rate in Tendring of 71% is also lower relative to these comparators. There are around 52,000 people employed in Tendring. While the employment rate is lower in Tendring relative to the comparators, it has increased at a greater rate than in Essex, the South East LEP and England.

5.14 The unemployment rate in Tendring is 7%, accounting for 3,900 people. This rate is higher than those of the comparators. This is largely driven by the high male unemployment rate in Tendring, while the female unemployment rate is similar to those in the wider geographies.

5.15 Further analysis of unemployment data shows that there is a high rate of unemployment in young people aged between 18 and 24.

Table 5.2 Labour Market Participation

	Tendring		Essex	South East LEP	England
	Number	%	%	%	%
Economic Activity Rate (16-64)	56,200	76%	81%	80%	79%
Employment Rate (16-64)	52,300	71%	78%	77%	75%
Unemployment Rate (16-64)	3,900	7%	4%	4%	4%
% of 18-24 unemployed	1,600	14%	8%	7%	8%
Male Unemployment Rate (16-64)	3,000	10%	4%	4%	5%
Female Unemployment Rate (16-64)	900	4%	4%	4%	4%
Job Seeker's Allowance Claimants	1,600	2%	1%	1%	1%

Source: Annual Population Survey, 2017

Broad Sectoral Composition

5.16 The table below presents information on the number of jobs and businesses in key sectors, along with the sector's share of total jobs or businesses, its location quotient (share of jobs/businesses that come from that sector in Tendring compared to the share in England) relative to England, and the change in jobs or businesses over the preceding five years.

5.17 The Tendring economy is relatively diverse, without a dominant sector. In terms of jobs, the main sectors in the area are retail; health and care; tourism; and education. Between them, these sectors make up nearly 55% of all jobs in the district.

5.18 There are a number of fast growing sectors in the Tendring economy. The number of jobs in ICT & digital increased by 229% between 2011 and 2016, though it started from a low base in 2011. The tourism sector grew by 35% over the five-year period, creating around 1,500 new jobs. There has also been an increase in the professional and financial sector, with 27% growth in jobs. However, while the sector is relatively large, making up 6% of Tendring's economy, it has a low location quotient.

5.19 Analysis of the data identifies a number of sectors which Tendring specialises in compared to England. These include:

- Ports & Logistics, where Tendring is 1.5 times more specialised than England, with around 2,250 jobs.
- Tourism, where Tendring is 1.3 times more concentrated than England, with around 6,500 jobs.
- Advanced manufacturing, where Tendring is 1.5 times more concentrated than England in terms of businesses, with 115 businesses and 1,375 jobs.
- Health and Care, where Tendring is 1.3 times more specialised than England, with around 6,500 jobs.

5.20 The Tendring economy is also specialised in the low carbon and energy sector. This is shown by its location quotient for businesses of 1.8.

Table 5.3 Composition of the Economy

		Business				Employment			
		UK Business Count				BRES			
		2017			Change 2012-17	2016			Change 2011-16
		No.	%	LQ	%	No.	%	LQ	%
Creative & Professional	Creative Services	325	6%	0.7	10%	1,000	2%	0.5	0%
	Business Support	340	7%	0.7	31%	2,500	6%	0.7	17%
	ICT & Digital	35	1%	0.7	17%	230	1%	0.7	229%
	Professional and Financial	660	13%	0.6	29%	2,375	6%	0.4	27%
	Other Services	220	4%	1.2	22%	800	2%	0.9	-10%
Support Industries	Ports & Logistics	185	4%	1.0	3%	2,250	6%	1.5	20%
	Transport	160	3%	1.1	-14%	2,125	5%	1.7	-11%
	Construction	820	16%	1.5	22%	2,500	6%	1.3	18%
	Wholesale	175	3%	0.8	-3%	1,500	4%	0.9	20%
Local Services	Retail	785	15%	1.3	-2%	6,500	16%	1.5	0%
	Tourism	480	9%	1.1	5%	5,000	12%	1.3	35%
Industrial	Manufacturing	310	6%	1.3	9%	3,000	7%	0.9	0%
	Adv. Manufacturing	115	2%	1.5	21%	1,375	3%	1.1	22%
	Utilities and Waste	30	1%	1.1	0%	475	1%	1.2	19%
Public Services	Health and Care	350	7%	1.2	-4%	6,500	16%	1.3	8%
	Public Admin	50	1%	1.4	-9%	1,375	3%	0.9	-8%
	Education	130	3%	1.0	24%	4,250	10%	1.2	-11%
	Total	5,150				40,500			
Low Carbon/Energy		300	6%	1.8	0%	1,300	3%	1.0	8%

Source: BRES, 2011, 2016, UK Business Count, 2011, 2017

HATCH REGENERIS

Sector Strengths

5.21 This section discusses a number of key sectors across Tendring. These are sectors which have been identified through the review of local policy documents or the above data analysis.

Table 5.4 Composition of the Economy

	Business				Employment			
	UK Business Count				BRES			
	2017			Change 2012-17	2016			Change 2011-16
	No.	%	LQ	%	No.	%	LQ	%
Ports & Logistics	185	4%	1.0	3%	2,250	6%	1.5	20%
Tourism	480	9%	1.1	5%	5,000	12%	1.3	35%
Adv. Manufacturing	115	2%	1.5	21%	1,375	3%	1.1	22%
Health and Care	350	7%	1.2	-4%	6,500	16%	1.3	8%
Low Carbon/Energy	300	6%	1.8	0%	1,300	3%	1.0	8%

Source: BRES, 2011, 2016, UK Business Count, 2011, 2017

5.22 The analysis focuses on the following sectors:

- Ports and Logistics
- Tourism
- Advanced Manufacturing
- Health and Care
- Low Carbon/Energy

5.23 These are sectors where Tendring has above average levels of specialisation and where employment is growing.

Ports and Logistics

5.24 The ports and logistics sector is a key sector for Tendring, as identified by the Essex Economic Plan and the South East LEP SEP. There are a number of significant assets related to the industry and the Haven Gateway is a nationally important cluster of ports. The five key ports are Felixstowe, Harwich International, Harwich Navyard, Ipswich and Mistley.

5.25 These ports are used for international ferry services, freight container vessel transport and storage and for cruise. Harwich ports have been used to support the operation and maintenance of the North Sea Wind Farms (including the Galloper Offshore Wind Farm at present). The ports at Mistley and Brightlingsea also support offshore wind and import activities. However, there is strong competition from other ports, including Great Yarmouth and Lowestoft.

5.26 Across the Tendring district, there are around 2,250 people employed in the ports and logistics sector, which is 6% of all jobs in Tendring. In terms of employment, Tendring is 1.5 times more specialised than England.

5.27 There are around 185 businesses in the sector based in Tendring. This represents 4% of all Tendring businesses and Tendring does not exhibit much of a specialisation in terms of ports and logistics businesses.

5.28 Harwich and Dovercourt is a key centre for ports and logistics work, with around 1,000 jobs located in the area. Relative to England, it has a location quotient of 4.

5.29 In terms of key sub-sectors, Tendring shows strength in water transport services (LQ of 15.1 against England), water freight transport (LQ of 3.4 against England) and road freight transport (around 600 jobs).

Tourism

5.30 The tourism sector is a large part of the Tendring economy with many people coming to the Essex coast for holidays. The coastal location has given rise to a number of seaside resorts, including at Clacton-on-Sea, Walton-on-the-Naze and Frinton-on-Sea.

5.31 5,000 people are employed within the tourism sector in Tendring, representing 12% of total jobs in the area. Tendring is relatively specialised in tourism, with a location quotient of 1.3. The sector has grown significantly in recent years, growing 35% between 2011 and 2016.

5.32 There are around 480 tourism businesses located in Tendring, representing 9% of total businesses. There is a slight specialism in tourism in Tendring, with a location quotient of 1.1.

5.33 Many tourism jobs are located in Clacton-on-Sea (with 1,375 jobs and a LQ of 1.0 against England) and Harwich and Dovercourt (1,250 jobs with a LQ of 2.0 against England).

5.34 Tendring specialises in holiday parks, camping grounds, trailer parks. There are 750 jobs in this sector, amounting to a location quotient of 12.2. Other key sub-sectors include tour operator activities (location quotient of 2.3 against England) and hotels (950 jobs with a location quotient of 1.4 against England).

Advanced Manufacturing

5.35 The advanced manufacturing sector is relatively specialised in Tendring compared to nationally and is one of the fastest growing sectors in the district. This is supported by key research interests at the University of Essex, particularly supported STEM skills.

5.36 There are 1,375 people employed in the advanced manufacturing sector in Tendring. These workers make up 3% of the Tendring workforce. In terms of jobs, Tendring is slightly specialised in advanced manufacturing with a location quotient of 1.1 against England. However, the number of jobs has grown by a significant 22% since 2011.

5.37 There are 115 advanced manufacturing business located in Tendring. These make up 2% of all Tendring businesses. Tendring is particularly specialised in advanced manufacturing businesses, with a location quotient of 1.5. The district has also seen business growth of 21% since 2012.

5.38 Tendring has a particularly strong specialism in the manufacture of electricity distribution and control apparatus, with 225 jobs and a location quotient of 11.0 against England. Other key sub-sectors include the manufacture of general purpose machinery (location quotient of 5.6 against England) and the repair of machinery (location quotient of 3.2 against England).

Health and Care

5.39 The health and care sector remains an important sector for the district. Tendring has a large number of residential care homes, perhaps reflecting its relatively old population. There is also a small life sciences sector in Tendring, with some business producing medical devices. In the wider Essex region, there is a particularly strong healthcare and life sciences sector. This is especially the case in the west of Essex.

5.40 The University of Essex supports the health and care sector in Tendring with a specialism in health and care research. The Essex Biomedical Science Centre is located at the University, providing high value jobs for residents.

5.41 Within the Tendring district, there are 6,500 people working in the health and care sector, which represents 16% of total jobs in the area. Tendring is 1.3 times more specialised than England in terms of this sector.

5.42 There are 350 health and care businesses located in Tendring. This represents 7% of all businesses in the area. In terms of health and care businesses, Tendring is 1.2 times more specialised than England.

5.43 Clacton-on-Sea is a key centre for health and care work, with around 2,750 jobs in this area. Compared to England, it has a location quotient of 1.5. Frinton-on-Sea and Walton-on-the-Naze also has a high location quotient of 1.7 against England. This possibly reflects the high proportion of residents aged over 65 (42%).

5.44 In terms of key sub-sectors, Tendring shows strength in elderly and disabled residential care (LQ of 3.2 against England), other residential care (LQ of 2.6 against England) and social work activities (LQ of 1.8 against England).

Low Carbon/Energy

5.45 While offshore energy was identified as a key sector in the previous Tendring Economic Strategy, the broader low carbon and energy sector is very important to the local economy. The coastal location has made Tendring a prime location for the growth of the offshore wind energy, while key infrastructure for the operation and maintenance of offshore wind energy production is in place at Harwich port.

5.46 The Energy Skills Centre in Harwich aids local skills development, particularly on engineering skills suited to supporting the offshore wind industry.

5.47 The wider low carbon and renewable energy sector across Suffolk and wider Essex is also strong, particularly relating to nuclear power generation. These sectors are supported by a significant supply chain and Tendring businesses are involved in this.

5.48 Based on the Hatch Regeneris Low Carbon Model, there are 1,300 jobs in the Tendring low carbon economy. This represents 3% of the jobs in Tendring. With a location quotient of 1.0, Tendring is not very specialised in terms of jobs compared to England.

5.49 On the other hand, there are 300 businesses in the district. Given that these businesses make up 6% of total businesses, Tendring is highly specialised in terms of low carbon businesses, with a location quotient of 1.8.

5.50 The largest centre in Tendring in terms of low carbon employment is Clacton-on-Sea, with 550 jobs. Clacton-on-Sea is relatively specialised in this sector, with a location quotient of 1.2 against England.

Business Base

5.51 The profile of Tendring's business base, in terms of size, is similar to the profiles seen in Essex, the South East LEP and England. A large proportion (84%) of Tendring's businesses employ less than ten people. However, this is slightly less than in other comparator areas.

5.52 Large businesses with over 250 employees are also less prevalent in Tendring. There are only five such businesses, representing 0.1% of all businesses in Tendring.

5.53 Conversely, there is a slightly higher proportion of small-sized businesses (13%) and medium-sized business (3%) compared to the picture in England.

Table 5.5 Size of Businesses

Business Size	Tendring		Essex	South East LEP	England
	Number	%	%	%	%
Micro (0-9)	4,330	84%	86%	86%	85%
Small (10-49)	680	13%	12%	12%	12%
Medium (50-249)	140	3%	2%	2%	3%
Large (250+)	5	0.1%	0.3%	0.3%	0.4%
Total	5,155	100%	100%	100%	100%

Source: UK Business Count, 2017

5.54 According to data from Companies House, there are currently 4,471 businesses registered in Tendring district. However, it should be noted that this may not be an accurate reflection of the number of businesses operating in the area as it is a count of the number of registered businesses rather than trading businesses.

5.55 As with employment centres in Tendring, a large number of businesses are located in Clacton-on-Sea (1,100 active businesses), Frinton-on-Sea and Walton-on-the-Naze (505 active businesses) and Harwich and Dovercourt (415 active businesses).

Enterprise

5.56 The ONS's Business Demography data indicates that there were around 550 business start-ups in Tendring in 2016. This represents around 6.8 businesses started per 1,000 working-age residents. This compares to around 10 new businesses per 1,000 working-age residents in Essex, indicating that start-up rates in Tendring are relatively low.

5.57 On the other hand, business closures were lower in Tendring than in Essex in 2016. There were around 5.6 business closures per 1,000 working-age residents compared to 8.4 in Essex.

5.58 These two factors contribute to a net start-up rate in Tendring that is only slightly below the Essex average. In 2016, 1.2 more business started-up than closed per 1,000 working-age residents.

5.59 This is slightly lower than the net start-up rate in England of 2.4 businesses and significantly lower than the rate of 5 business in the South East LEP.

Figure 5.4 Business Birth and Death Rate per 1,000 Working-Age Residents, 2016

Source: UK Business Demographics, 2016

5.60 As noted above, there are 4,471 active businesses registered in Tendring, according to Companies House data. Of these active businesses, 811 were incorporated in 2017 or 2018. This indicates that 18% of active businesses started in the last year and a half. This percentage will be slightly skewed as it does not factor in businesses that have closed over the past 18 months.

6. Commercial Property Market

Summary

- In terms of the **office market**, the sector is dominated by smaller suites and office units geared towards the SME market.
- In the past two years there has been a higher volume of transactions than previously and some recent evidence of larger spaces transacting (>500 sq m).
- Clacton remains the centre point of the office market with the largest number of deals and largest amount of floorspace transacted.
- Other important local office markets include Harwich, Ardleigh and Elmstead.
- Office occupancy rates are at around 90-95% which suggests Tendring has a vibrant and attractive market with capacity for growth but with limited choice in the market.
- In terms of the **industrial market**, industrial transactions have been fairly consistent over the last decade but have increased in the last couple of years.
- Clacton remains the dominant focus of this market with Gorse Lane industrial estate seeing the largest levels of activity.
- Longer-term leases on good quality stock suggests there is come confidence in the market.
- Similar to the office market, occupancy levels are generally high and there is a shortage of readily available stock in the market.

Introduction

6.1 The following chapter outlines the current property market in Tendring, based on recorded information on commercial transactions in the District, currently available commercial premises, enquiries for commercial property and discussions with locally active property agents.

Deals

6.2 A list of recorded deals completed between 2008 and 2018 (year to date), obtained from the EGi property database, has been compiled and analysed in Table 6.1 below. Overall, 137 office and industrial/warehouse deals were recorded, comprising 55,108 sqm. There was a relatively even split between office transactions (56 percent) and industrial/warehousing (44 percent), although industrial floorspace transacted significantly outweighed the office total, accounting for 75 percent of total floorspace. It should be noted that typically not all transactions are recorded, including those completed by local Tendring agents and property owners, however, it provides a good guide to the level and nature of activity in Tendring, highlighting market trends. Clearly, the 2018 data is only partially complete, with the data collected in July 2018. Furthermore, there is typically a lag within the property database of the recording of the data and thus further transactions may have been finalised in the most recent months, which have yet to be recorded in the database.

Table 6.1 Number of Deals by Year - Tendring District						
	Office		Industrial		Total	
	No. of Deals	Floorspace (Sqm)	No. of Deals	Floorspace (Sqm)	No. of Deals	Floorspace (Sqm)
2008	1	351	2	390	3	741
2009	3	284	6	12,862	9	13,146
2010	2	337	5	1,309	7	1,646
2011	4	432	4	2,059	8	2,491
2012	10	1,905	3	3,139	13	5,044
2013	9	2,565	8	2,929	17	5,494
2014	4	472	6	5,587	10	6,059
2015	10	1,624	7	2,689	17	4,313
2016	9	718	11	5,243	20	5,961
2017	14	2,429	12	4,198	26	6,627
2018 (YTD)	5	2,819	2	767	7	3,586
Total	**71**	**13,936**	**66**	**41,172**	**137**	**55,108**

Source: EGi, 2018

6.3 Table 6.2 details these 137 deals by terms of transaction type. Overwhelmingly across the study period, deals have been completed on a leasehold basis (80 percent), with an average of only 2.5 freehold transactions completed per year since 2008.

Table 6.2 Deals Listed by Terms of Sale (2008-2018) - Tendring District			
	Leasehold	Freehold	Total
Office	59	12	71
Industrial	51	15	66
Total	110	27	137

Source: EGi, 2018

6.4 For offices specifically, 59 deals (83 percent) were completed on a leasehold basis between 2008 and 2018. Although freehold deals have been infrequent, the most recent occurred in April 2018 and saw the 2,517 sqm Custom House in Harwich sold for £1.2 million. This is, however, to be converted to residential use in due course.

6.5 51 completed industrial deals (77 percent) have been leasehold and the most recent freehold transaction can be found as far back as December 2016 with the sale of the 3,382 sqm Unit 11, Martells Industrial Estate, Ardleigh.

Office

6.6 Table 6.3 below provides a breakdown of office deals since 2008 in the District by year. Of the 71 deals recorded, 65 have a size figure associated with them. In total, 13,936 sqm was transacted with an average deal size of 196 sqm.

Table 6.3 Office Deals by Year (2008-2018) - Tendring District		
	No. Deals	Floorspace (Sqm)
2008	1	351
2009	3	284
2010	2	337
2011	4	432
2012	10	1,905
2013	9	2,565
2014	4	472
2015	10	1,624

2016	9	718
2017	14	2,429
2018	5	2,819
Total	**71**	**13,936**

Source: EGi, 2018

6.7 Although the recessionary period across 2008-2009 and low confidence in following years clearly reflects in the deals figures for the early part of the decade, the most recent three full years (2015-17) have seen a higher volume of office transactions. An average of six office deals per year have been completed since 2008, although the average is 11 deals for the period 2015-17. The first half of 2018 has seen deals almost reach the annual decadal average.

6.8 While the market is seemingly characterised by smaller suites and office units, there is evidence of larger spaces transacting over the last decade. The two of the three largest completed transactions in Tendring during this period have occurred since May 2017, perhaps demonstrating a changing shift in the types of occupier demand. The three largest transactions since 2008 are as follows:

- *Custom House, Harwich* – 2,517 sqm – purpose-built office building for HM Revenue & Customs in the 1980s. Sold for £1.2 million (03/04/18). This is likely to be converted to a residential use.
- *Harlech House, Clacton-on-Sea* – 1,709 sqm – large town centre office building (sold 15/05/13). This has subsequently been converted to a residential use.
- *Apex 12, The Beeches* – 631 sqm – modern character office buildings (let 15/05/17).

6.9 In order to better understand the geographical spread of these office deals, Table 6.4 details them by location. Since 2008, Clacton-on-Sea has been the centre point of the Tendring office market, accounting for 28 deals (39 percent of the total). Clacton also accounts for almost the same percentage of transacted floorspace. However, Table 6.4 also demonstrates the important function, however small, of Tendring's more rural locations, all of which have seen some market activity over the previous decade.

Table 6.4 Office Deals by Location (2008-2018) - Tendring District

	Office	
	No. of Deals	Floorspace (sqm)
Clacton-on-Sea	28	5,343
Harwich	9	3,639
Ardleigh	12	2,293
Manningtree	3	221
Brightlingsea	1	351
Elmstead Market	14	1,665
Great Bentley	2	94
Frinton-on-Sea	2	330
Total	**71**	**13,936**

Source: EGi, 2018

6.10 Since 2012, a number of deals have been completed in Elmstead Market, exclusively on the site known as Lanswood Park. While the size information provided by EGi is not wholly comprehensive, it is clear that the speculatively built first phase saw early transactions in which occupier's took whole floorplates or indeed entire units on a leasehold basis. Deals in more recent years however have focused on smaller suites. This in part explains the slightly diminished average deals size of 119 sqm at the Park.

6.11 The other notable office location is Ardleigh. Deals suggest that this is due to a number of business centre options including Apex 12 and Crown Business Centre. Again, the nature of these business centre options, although notable in deal frequency, does produce a smaller average deal size of 191 sqm.

Office Rents

6.12 Although recent deals at Lanswood Park have increased the prime rent figure to almost £205/sqm (£19/sqft), this is very unusual and reflective of the rare instance of quality space available at the Elmstead Market site. Although deals over £100/sqm (£9.30/sqft) are not uncommon, based on available rental information between 2008 and 2018, an average office rent for the district sits at £96.45/sqm (£8.96/sqft).

Industrial

6.13 Table 6.5 below provides a breakdown of industrial/warehouse deals since 2008 in the District by year. Of the 66 deals recorded, 65 have a size figure associated with them. In total, 41,172 sqm was transacted with an average deal size of 624 sqm.

Table 6.5 Industrial Deals by Year (2008-2018) - Tendring District

	No. Deals	Floorspace (sqm)
2008	2	390
2009	6	12,862
2010	5	1,309
2011	4	2,059
2012	3	3,139
2013	8	2,929
2014	6	5,587
2015	7	2,689
2016	11	5,243
2017	12	4,198
2018	2	767
Total	66	41,172

Source: EGi, 2018

6.14 In terms of both deals and total floorspace, the past decade has been relatively consistent, minus a couple of notable exceptions. Following a run of single-figure completions, both 2016 and 2017 saw a spike in completed deals. Almost half of these deals can be found in Clacton-on-Sea, all almost exclusively on Gorse Lane Industrial Estate. This effectively cements Clacton-on-Sea as Tendring's most popular industrial location, which is discussed further below.

6.15 The other notable highlight is the large spike of completed floorspace in 2009. This unusual total of 12,862 sqm is due to the sale of the Delfords Factory in Harwich (10,219 sqm), by some way the largest deal completed since 2008. Whilst this site was in fact sold for residential use, larger industrial deals are otherwise not uncommon however and there a couple of other larger premises of note:

- *The Maltings, Ardleigh* – 1,206 sqm – no price provided (22/12/17)
- *11, Martells Industrial Estate, Ardleigh* – 3,382 sqm – sold for £2.07 million (20/12/16).

6.16 Again, the completed industrial deals have also been detailed by location, in Table 6.6 below. As with the above office deals, although even more so, Clacton-on-Sea is by some way the most established industrial location in Tendring, accounting for 41 (62 percent) of deals and a total of 14,894 sqm (36 percent) floorspace.

Table 6.6 Industrial Deals by Location (2008-2018) - Tendring District

	Office	
	No. of Deals	Floorspace (sqm)
Clacton-on-Sea	41	14,894
Harwich	3	10,612
Ardleigh	6	9,262
Manningtree	10	4,330
Brightlingsea	5	1,413
Elmstead Market	-	-
Great Bentley	-	-
Frinton-on-Sea	-	-
Alresford	1	661
Total	66	41,172

Source: EGi, 2018

6.1 Aside from a handful of deals in other locations, only Manningtree represents another busy industrial location, owing to a number of high-density schemes including Causeway End Industrial Estate and Riverside Avenue West. Given this position, married with the fact that the average deal per year rate is just one, this is indicative of a low volume market activity outside of Clacton. This is corroborated by the discussions with the local commercial property agents (see Table 6.9), which suggest that Clacton is the focus of the main interest by the market, with low volumes elsewhere.

Industrial Rents

6.2 The average rent achieved in Tendring from 2008 to 2018 is £55/sqm (£5.10/sqft). While there have been several sporadic instances of industrial rents reaching as high as £90/sqm (£8.40/sqft), most recently in April 2017 with the letting of the 135 sqm Unit 2, Dunstan Gate, Clacton-on-Sea (£88.91/sqm), this average certainly fits in with the transaction information available.

Property Supply

6.3 A schedule of the vacant property currently being marketed in Tendring as of July 2018 has been compiled mainly through physical survey, through a search of commercial property agents' websites and consultations with agents. The marketed space is taken to be a reasonably accurate estimation to that which is vacant, however this does not include empty units which are not currently being marketed. The full listings of the industrial and office units have been included in Appendix D.

Office

6.4 Table 6.7 shows that 1,443 sqm of vacant office floorspace is being market from 28 properties. Vacancies are small units, particularly 21-50 sqm, with the largest available office unit at Alresford (250 sqm). This demonstrates the small nature of the office market in Tendring, which is geared towards SME businesses.

Table 6.7 Amount of Marketed Office Property

		Size Band (sqm)					
		0-20	21-50	51-100	101-200	200+	Total
Clacton-on-Sea	No. of Props	4	7	-	1	-	12
	Total Floorspace	52	220	-	120	-	392
Brightlingsea	No. of Props	-	-	2	-	-	2
	Total Floorspace	-	-	158	-	-	158
Great Bentley	No. of Props	-	-	2	-	-	2
	Total Floorspace	-	-	138	-	-	138
Harwich	No. of Props	-	3	-	-	-	3
	Total Floorspace	-	116	-	-	-	116
Elmstead Market	No. of Props	1	6	-	-	-	7
	Total Floorspace	17	195	-	-	-	212
Wix	No. of Props	-	-	-	1	-	1
	Total Floorspace	-	-	-	177	-	177
Alresford	No. of Props	-	-	-	-	1	1
	Total Floorspace	-	-	-	-	250	250
Total	No. of Props	5	16	4	2	1	28
	Total Floorspace	69	531	296	297	250	1,443

Source: BE Group, 2018

6.5 The largest supply within a single area was found in Clacton-on-Sea with 12 available properties comprising 392 sqm of vacant floorspace, almost half of the stock on the market by number of properties. The largest within Clacton-on-Sea features Atlantic House, Telford Road of 120 sqm on the market to be sold. Overall within Tendring, the largest vacant floorspace can be found at Unit 1, Orchard Business Units in Alresford where 250 sqm is being marketed.

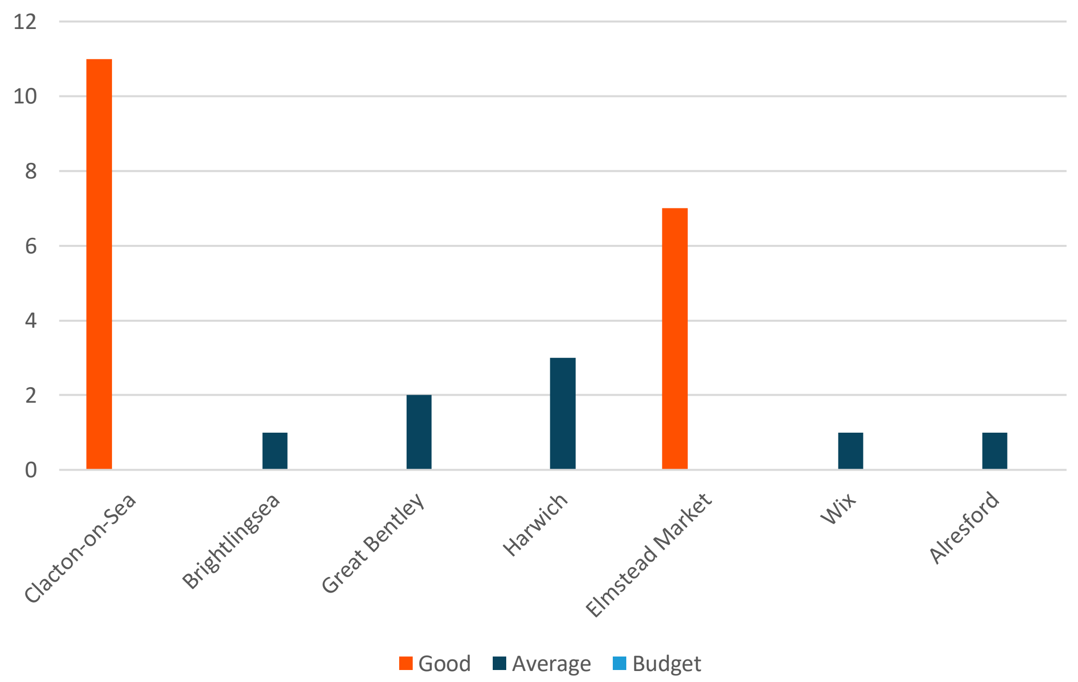
6.6 Elmstead Market contains the second highest number of vacant units with seven (25 percent) on the current market comprising 212 sqm of floorspace. The remaining locations within Tendring are experiencing generally no more than three vacant properties on the current market and whilst supply is spread across Tendring, the south-east is seeing a lack of vacant properties due to a general lack of supply across the area.

6.7 As of July 2018, there are also two speculative office schemes currently being marketed in Tendring. This data has not been included in the above supply given that the space is either currently in the planning process, or under early construction. An indication of the developments in question is discussed below:

- Hudson Park, Old Ipswich Road, Ardleigh **(planning application submitted)**
  - A new development of up to five new detached office buildings of a high specification to include; double glazed aluminium windows, suspended ceilings incorporating LED lighting and recessed air conditioning cassettes. Options available from approx. 94 sqm to 760 sqm for a whole building (and multiples between). Available for Sale Freehold or To Let on a new flexible full repairing and insuring leases.
- Diary Barn Mews, Summers Park, Lawford **(completion expected Spring 2019)**
  - Newly constructed, high-specification office accommodation benefiting from onside parking. Approx. 700 sqm available across six units. Offices are available to let by way of new Full Repairing and Insuring Leases.

6.8 Figure 5.1 shows that 18 (69 percent) of available properties were of good quality, with a further eight (31 percent) being of average quality. No budget options can be found available at present. This rating was based upon a review of the marketing for the premises and the price points set for each unit. As previously stated, Clacton-on-Sea contains the highest number of available properties, with 100 percent of the properties on the market here available on a leasehold basis and considered to be of a good quality.

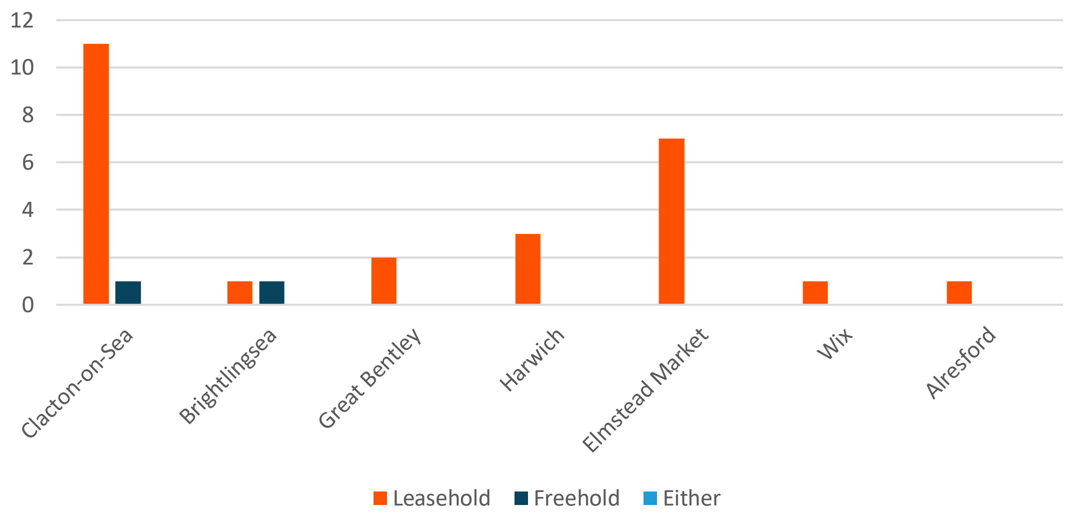
Figure 6.1 Quality of Marketed Office Property



Source: BE Group, 2018

6.9 Figure 5.2 below shows the split of tenures of the current vacant properties. The most available properties are being offered on a leasehold term with 26 (93 percent). A further two properties (seven percent) are being offered on a freehold basis only, found at Clacton-on-Sea and Brightlingsea. No properties are being marketed with the option of either leasehold or freehold.

Figure 6.2 Tenure of Marketed Office Property



Source: BE Group, 2018

Industrial

6.10 Table 6.8 illustrates that as of July 2018, there is 8,376 sqm of vacant industrial floorspace, within 27 properties, split across seven different areas of Tendring. The location of the largest marketed vacant floorspace can be found in Brightlingsea with Hall Works, Church Road totalling 1,124 sqm.

Table 6.8 Amount of Marketed Industrial Property

		Size Band, Sqm					
		0-100	**101-200**	**201-500**	**501-1,000**	**1,001+**	**Total**
Clacton-on-Sea	No. of Props	1	2	4	1	-	8
	Total Floorspace	58	330	1567	557	-	2,512
Manningtree	No. of Props	-	4	3	1	-	8
	Total Floorspace	-	561	1,128	744	-	2,433
Weeley	No. of Props	-	-	2	-	-	2
	Total Floorspace	-	-	441	-	-	441
Thorpe-le-Soken	No. of Props	-	2	-	-	-	2
	Total Floorspace	-	287	-	-	-	287
Harwich	No. of Props	-	-	-	1	-	1
	Total Floorspace	-	-	-	906	-	906
Brightlingsea	No. of Props	2	-	-	-	1	3
	Total Floorspace	186	-	-	-	1,124	1,310

Source: EGi, 2018

6.11 Availability is spread across the size ranges but mostly seen between 100-500 sqm. Only one property is available with a floorspace above 1,000 sqm (10,760 sqft). The specific size range of 201-500 sqm saw the highest number of available properties on the market, 10 (37 percent). These comprised of 3,416 sqm, which is the largest amount for a single size range. Whilst properties of 101-200 sqm are also in high supply in terms of number of units, with nine (33 percent) comprising of 1,317 sqm, units of 501-1,000 sqm contained the second largest amount of floorspace, 2,207 sqm.

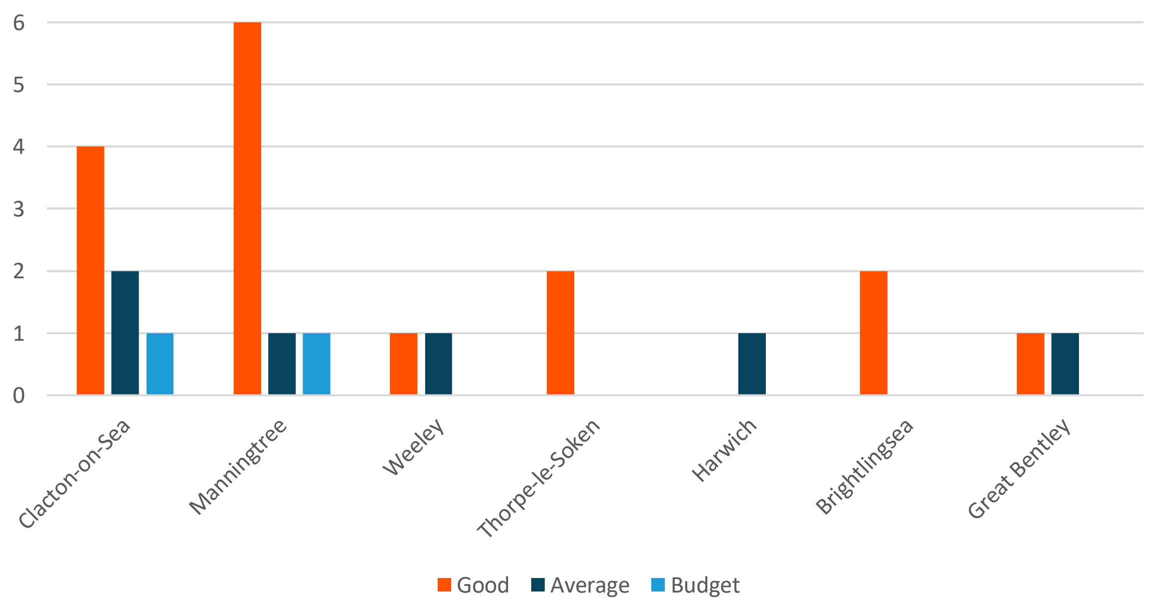
6.12 Clacton-on-Sea and Manningtree each contain eight available units, the largest supplies seen for a single area. These were also the locations that saw the highest number of industrial transactions over the last decade. Whilst Clacton-on-Sea comprises 2,512 sqm from these units, Manningtree sees a slightly less vacant floorspace total of 2,433 sqm. Together these two locations are home to 60 percent of the vacant floorspace for industrial units within Tendring.

6.13 The remaining five locations, likewise with office units, are seeing no more than three vacant properties per area and supply of these 27 properties is again spread across Tendring.

6.14 As of July 2018, there are no marketing particulars in circulation for speculative industrial premises under construction in Tendring.

6.15 Figure 5.3 shows that the majority of available space within Tendring is of a good quality with 16 units (66 percent), based on a review of the properties and price points. A further six units (25 percent) are of an average quality and, unlike with office units within Tendring, there are budget offerings available. Two units (nine percent) are available at budget level, within Clacton-on-Sea and Manningtree. A full range of quality of marketed units is only seen in these two locations.

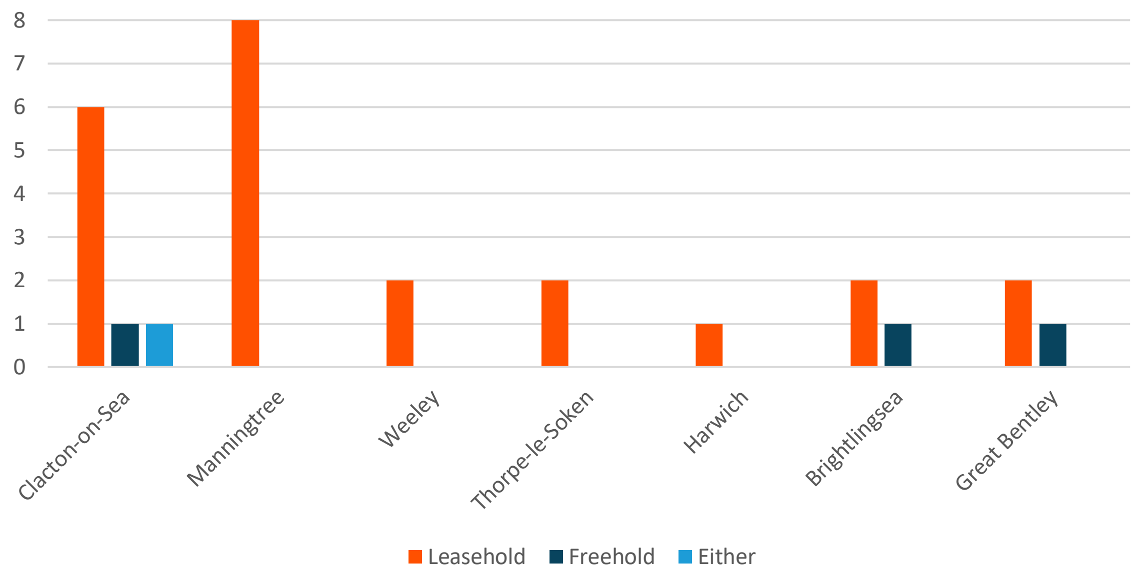
Figure 6.3 Quality of Marketed Industrial Property



Source: BE Group, 2018

6.16 Leasehold properties within Tendring are dominating the current market with 23 units (85 percent) being marketed to let. The remaining stock is split, with three units (11 percent) being marketed to sell and one unit (four percent) being marketed as leasehold/freehold. The unit at 2 Telford Road, Clacton-on-Sea is the only industrial unit available as either tenure.

Figure 6.4 Tenure of Marketed Industrial Property



Source: BE Group, 2018

Valuation Office Data

6.17 The Valuation Office Agency (VOA) provides data on the total number of business premises and overall floorspace by local authority. The latest figures published are from 2016.

Office

6.18 According to the VOA statistics, there are 530 office hereditaments within Tendring, totalling 64,000 sqm. From Table 6.7 above it can be seen that 1,443 sqm of office floorspace is currently being marketed within 28 properties in Tendring. This suggests an overall occupancy rate of 97.8 percent by floorspace and 94.7 percent by occupied premises. These occupancy rates, drawn from comparing overall 2016 data to vacant premises in 2018, provides an estimate only of the actual occupancy level, rather than an exact figure. However, it is instructive as to the overall performance of the market.

6.19 Occupancy rates of 90 to 95 percent show a vibrant and active market, whilst also providing capacity for growth. High occupancy rates show a full market with businesses having difficulties in finding premises, whereas low occupancy rates indicate derelict stock and poor business growth. The overall office occupancy rates suggest a tightly-held market, with limited choice in the market.

Industrial

6.20 The VOA figures indicate that there are 1,320 industrial premises within Tendring which comprise 446,000 sqm. 27 vacant industrial premises can be found on the current market, totalling 8,376 sqm, as described in the Property Supply section above. This suggests an overall occupancy rate, by floorspace, of 98.1 percent and by number of premises of 98 percent.

6.21 The overall occupancy rates for industrial units within Tendring, by floorspace and premises number, are high which suggests a full market with businesses finding limited available premises. This is similar to the trend identified for the office market and can indicate a shortage of supply in both markets.

Consultation with Property Agents

6.22 The above analysis of the property data pertaining to Tendring has been supported by consultations with commercial property agents active in the district. Agents were asked about activity levels in Tendring, key market sectors, spatial differences and the key employment nodes. Feedback from the agents is summarised in the tables below. The names of the agent or agency have not been provided in order to protect confidentiality.

Table 6.9 Property Market Comments

Contact	Comment
Local Agent	The industrial market has picked up some pace in recent years, with a number of historic property owners opting to sell their long-owned units. The market is however characterised more so by leasehold transactions. Existing industrial stock in Tendring is generally characterised as older, brick built/asbestos units. Deals on these units complete at around £50/sqm (c. £4.65/sqft). More modern units on Gorse Lane in Clacton have been purpose built for specific occupiers and command a larger rent of around £80-90/sqm (£7.50-8.50/sqft), however these deals have previously been completed on 10/15 year leases. This has led to a 10-15 year lack of supply, with growing demand. During this time, some units with a degree of flexibility have fared well, allowing for use as trade counters, bathroom showrooms and MOT garages. Retail units will take at least 12 months to let – with no demand and growing supply as more units become vacant.
Local Agent	Not a lot of office supply in Tendring. Most of the supply is centred on Clacton, with some deals transacted on longer term bases. Rents are generally never more than £100/sqm (£9.30/sqft), unless in much more modern circumstances such as Lanswood Park and in serviced accommodation. Second-hand stock generally trades at around £80/sqm (£7.50/sqft). Smaller towns like Clacton need strong infrastructure in order to attract larger companies and demand (reflecting the strategy of larger locations such as Colchester). • Shops and schools are needed to fortify the building of new homes • M&S planning to close Clacton store, there is a petition to try and keep it open Towns need to be sustainable to encourage consistent market performance.

Local Agent	There is high demand for industrial across a varying size range, however more so on the smaller/moderately sized units. Car/MOT uses have proven to be the most popular in recent years, however storage/distribution interests are also increasing, depending on price. Industrial rents sit at around £50/sqm (£4.65/sqft). Business rates are also a big focus for smaller occupiers (both office and industrial) with premises often chosen based on the subsequent rates payable. Office rents sit at around £100/sqm (£9.00/sqft). Clacton is the most popular area for both – in particular it is a strong industrial area with good demand, however a dwindling supply. Transactions are primarily leasehold, however freehold deals in recent years have picked up pace.
Local Agent	Commercial, B-class market is limited however and primarily in Clacton-on-Sea. Employment allocations in Harwich are undesirable as market testing dictates that there is no demand in the more isolated areas of Tendring What demand there is in Tendring is focused on smaller, more flexible spaces in which SME's can expand or shrink as appropriate without large overheads.

Source: BE Group, 2018

Property Market Summary

6.23 The review of the property market has identified the following key points:

- The property market is a small, localised market, with low transaction volumes and the units being taken up are small. This is true for both the office and industrial markets.
- There is a very high occupancy rate in the property market for office and industrial premises.
- The most recent years (since 2015) have seen an increase in transaction volumes for both office and industrial premises, suggesting confidence in the market.
- Clacton-on-Sea is the most important market for commercial property in Tendring, although other towns and villages provide small but important roles in the overall provision of stock.
- Longer term leases (10-15 years) on the quality stock in Tendring suggests confidence in the market, but also ties up this quality stock for several years, limiting choices for those looking to enter the market.
- The local commercial agents report good demand for stock (predominantly small units) but a lack of supply.

6.24 Therefore, while the market is small, it is a strong market with high occupancy levels and above average transaction volumes in the most recent years. The low vacancy levels suggest that the momentum of these transaction volumes may struggle to be maintained without further stock being brought to the market.

7. Demand Scenarios

Summary

- Based on Planning Practice Guidance, three approaches have been considered in the assessment of future employment land needs to 2033. These are outlined below.
- The **Employment led scenario** is based on bespoke sectoral employment forecasts provided by Experian UK (June 2018) and informed by PBA's population projections for the district. This scenario takes account of the distortions and errors in the official population projections.
- Overall employment in Tendring is expected to increase by 5,540 FTEs for the period 2017-33, with the increase in B-use class employment amounting to 674 FTEs.
- Under this scenario, for the period 2017-33 it is expected that requirements for employment land will be 1.72 ha of B1a/B1b, -2.69 ha of B1c/B2 and 4.28 ha of B8 land.
- The **Labour supply** approach is based on the how the local labour force is affected by the proposed housing delivery in the district to 2033. Under this scenario, for the period 2017-33, it is anticipated that requirements for employment land will be 0.73 ha of B1a/B1b, -3.23 ha of B1c/B2 and 1.09 ha of B8 land.
- The **Past take-up** scenario is based on the delivery of employment floorspace over a five to ten-year period for which data is available. Under this scenario it is expected that requirements for employment land will be 0.3 ha of B1a/B1b, 2.6 ha of B1c/B2 and 5.8 ha of B8 land.

Introduction

7.1 This section sets out a series of growth scenarios for Tendring District focussing on B-use class employment floorspace and land needs. The approach used to generate projections of future need is based on the methodology specified in the Planning Practice Guidance (Methodology: Assessing Economic Development and Main Town Centre Uses). Based on this guidance three approaches have been considered in the assessment of future employment land needs to 2033, these are:

- **Employment led** scenarios based on sectoral employment forecasts;
- **Labour supply** approach based on how the local labour force is affected by the proposed housing delivery in the district to 2033; and
- **Past take-up** scenario based on the delivery of employment floorspace over a ten-year period for which data is available

7.2 It should be noted the assumptions used to inform the above approaches have been updated from the 2013 Tendring District Employment Land Review[4] taking account of new data releases and updated guidance on Employment Land Densities.

Employment-led Scenario

7.3 This section considers the potential scale of employment land need within the District over the period 2017-2033 based on employment forecasts. Employment forecasts

[4] Tendring Employment Land Review, Regeneris Consulting Ltd, October 2013

show future changes in the number of jobs in different sectors based on a range of evidence, including:

- Past trends at the national, regional and local levels, in terms of gross value added (GVA) and employment change;
- the share of jobs in different sectors in an area compared with national and regional averages as a measure of concentrations of employment. This serves as a proxy for sector strengths in terms of current and past performance;
- forecast growth rates nationally and regionally taking account of government projections and other sources to understand how the UK economy is expected to perform in the future; and
- data on an area's current population and labour force, as well as projected changes. Forecasting models generally factor in projected change in an area's workforce (resident and in-commuting) which represents a constraint on the level of jobs growth it might sustain in the future.

7.4 This last point in relation to population and labour force is a particularly important issue for Tendring. It has recently been demonstrated at the Examination in Public (EiP) for the Strategic Section 1 Plan that Tendring has a significant Unattributable Population Change (UPC) accounted for by inaccuracies in migration flow data which continue to affect the official household projections for the District. This suggests that employment forecasts for Tendring, which factor in ONS produced sub-national-population-projections (SNPPs) will be distorted by errors in internal migration data which lead to an over-estimate of the population for the District.

7.5 In order to address this issue, Hatch Regeneris has commissioned Experian UK to produce an employment forecast for Tendring based on population projections that have been used to inform the District's OAN and that have been approved at EiP. These projections were produced by PBA and address the distortions created by errors in international migration data.

7.6 By way of comparison, we have also considered the **East of England Forecasting Model (EEFM)**. Developed by local authorities in the East of England and Cambridge Econometrics, this model is a widely-used source of data on both employment forecasts and their housing implications. The latest version of the EEFM is 2017. This version does not address the population issues related to Tendring and is used for comparison purposes only.

Estimating Employment Land Need

7.7 The table below (**Table 7.1**) indicates that overall employment in Tendring District is expected to increase by between 3,240 and 5,540 jobs between 2013 and 2028. As discussed above, the two sets of forecasts have differing views on the drivers of this overall growth. The Experian forecasts anticipate that employment growth will in part be driven by B use class employment with expected growth of around 670 FTEs together with growth in the education, health and care and accommodation and food services sectors. The EEFM anticipates growth will be driven by these same sectors but that for B-class employment sectors there will be a small decline (-50) over the same period. The main differences between the two sets of forecasts in terms of B use classes is that Experian anticipate a stronger growth in business and professional services than the EEFM model, as well as growth in distribution services compared to a decline anticipated by the EEFM.

Table 7.1 Total jobs and FTEs requiring B-class floorspace in Tendring District, 2017-33

	2017	2033	Change 2017-33	B-class FTEs
Experian June 2018	49,160	54,700	+5,540 (+11.3%)	+674
East of England Forecasting Model 2017	50,095	53,336	+3,240 (+6.5%)	-52

Source: Calculations by Hatch Regeneris, 2018.

7.8 Using typical floorspace per FTE employee estimates provided by the Homes and Communities Agency[5] (now Homes England), it is possible to estimate the level of floorspace required to forecast (B-class FTE) employment change in the district between 2017 and 2033.

7.9 Allowances are also made for safety margin and market vacancy as follows:

- An allowance of 10% is added to all floorspace requirements to reflect normal levels of market vacancy in employment floorspace. This is only added where demand for floorspace is growing.
- A safety margin of 10% is added to allow for flexibility and to provide a choice of sites for potential occupiers. This is only added where demand for floorspace is growing.
- Where the demand for a certain type of floorspace falls in a district, this is not netted off from the total employment space requirement. This assumes that manufacturing floorspace which is freed up due to a fall in demand cannot be substituted to meet an increase in demand for office floorspace.

7.10 Table 7.2 below shows that both sets of forecasts agree that demand for floorspace will be driven by office-based sectors (B1a and B1b uses). There is however a significant variation between the two sets of forecasts in the scale of this anticipated demand ranging from 4,990 sq. metres to 17,210 sq. m. Both sets of forecasts agree there will be a decline in the demand for manufacturing floorspace ranging from -7,950 sq. metres to -10,760 sq. metres.

7.11 In contrast, there is no agreement between the two sets of forecasts in terms of demand for Distribution (B8) floorspace with anticipated demand ranging from -3,760 sq, metres to +21,420 sq. metres. In short, the Experian forecasts anticipate growth in the wholesale and land transport sectors whilst the EEFM expects a small decline in the wholesale sector.

Table 7.2 Floorspace requirement based on economic forecasts, 2017-33 (sq. metres)

		FTEs		Floorspace (sq. metres)	
		total	pa.	total	pa.
Experian	Office (B1a & B1b)	755	47	17,210	1,075
	Manufacturing (B1c & B2)	-310	-19	-10,760	-670
	Distribution (B8)	230	14	21,420	1,340
EEFM17	Office (B1a & B1b)	210	15	4,990	310
	Manufacturing (B1c & B2)	-215	-15	-7,950	-500
	Distribution (B8)	-50	-5	-3,760	-235

Source: Calculations by Hatch Regeneris, 2018.

Please note: FTE job numbers and floorspace are rounded to the nearest multiple of 5

[5] Homes and Communities Agency (now Homes England), 'Employment Density Guide', 2015.

7.12 The next step in identifying employment land need for 2017-33 is to translate the demand for floorspace into overall land requirements. This is determined by the nature of employment land development in the district in addition to the type of floorspace delivered. This is based on typical plot ratios (ie. ratios looking at the relationship between gross floorspace and total site area) for each B-class, land-use type. The following plot ratios were used to convert floorspace into employment land requirements:

- Office (B1a and B1b) - 0.5 ha (2 storeys)
- Manufacturing (B1c and B2) - 0.4 ha (single storey)
- Storage (B8) - 0.5 ha (single storey)

7.13 The land requirements for both forecasts in terms of office (B1a and B1b), manufacturing (B1c and B2) and distribution (B8) uses are shown in the table below. Focussing solely on the Experian based forecasts which have been adjusted to take account of errors in population forecasts, this suggests that around 1.72 ha of B1a/B1b land will be required as well as 4.28 ha of B8 land. In contrast, it is expected that around 2.7 ha of B1c/B2 land may become surplus over the same time period.

Table 7.3 Employment land requirements in Tendring 2017-33, hectares

	Office (B1a & B1b)		Manufacturing (B1c & B2)		Distribution (B8)	
	2017-33	pa.	2017-33	pa.	2017-33	pa.
Experian	1.72	0.11	-2.69	-0.17	4.28	0.27
EEFM2017	0.5	0.03	-1.99	-0.12	-0.75	-0.05

Source: Calculations by Hatch Regeneris, 2018

Labour Supply Scenario

7.14 The labour supply scenario takes projected population changes in the district (based on housing delivery each year over the Plan period) to derive the implied size of the workforce as well as the number of jobs that this could support. The approach used to calculate employment land need based on changes to the labour force, is similar to that used in the assessment of the district's Objectively Assessed Housing Need (OAN) and makes use of the POPGROUP model[6]. Once the size of the labour force is determined, current and future sectoral make-up of the district's economy are applied to the labour force, and the demand for employment land need is calculated.

7.15 To ensure consistency with the assessment of future housing need in the district, this scenario has drawn on the Council's OAN to deliver 11,000 dwellings between 2013 and 2033 or 550 dwellings per annum (dpa). Data on housing completions in the district reveal that 1,939 dwellings have been completed in the period 2013/14-2017/18 leaving a further 9,061 to be completed or 566 dpa to 2033.

7.16 Table 7.4 below shows the expected change in labour supply based on the Council's OAN.

7.17 Based on the Council's emerging plans, it is expected that the district's working age population will increase by just over 4,000 people (or +5.2%) between 2017and 2033. The number of economically active residents is expected to increase by 4,270 people (or by +6.8%). This is the result of changes in the national retirement age, and reflects an increasing trend where people stay in employment for longer. As a result, the number of residents in employment is expected to increase by an additional 4,040 people (+6.8%) between 2017 and 2033, or +250 people each year.

Table 7.4 Growth in workforce as part of labour supply scenario, 2017-2033

		Council's emerging plans for 11,000 homes	
		no.	%
Total population – 2033		163,450	
Change 2017-2033	Population	18,740	+13%
	Working age population	4,080	+5.2%
	Economic active residents	4,270	+6.8%
	Residents in employment	4,040	+6.8%
	Annual growth	250	+0.41%

Source: Based on Tendring District Council's OAN; Calculations by Hatch Regeneris, numbers have been rounded to the nearest 10

7.18 Employment growth (+4040 additional jobs between 2017-33) is then allocated to different sectors based on the Experian forecasts. The steps used to convert the jobs resulting from the Council's emerging plans into floorspace and employment land need are outlined in Appendix G and are similar to the method used to calculate employment land need based on the economic forecasts.

7.19 The table below shows that under the labour-supply scenario, around 7,290 sq. metres of office (B1a and B1b) floorspace will be required by 2033 together with 5,440 sq. metres of distribution (B8) floorspace. The table also shows that over the 2017-33 period there will be 12,930 sq. metres of surplus floorspace for manufacturing (B1c and B2) uses.

Table 7.5 Floorspace requirement based on labour force forecasts, 2017-2033 (sq. metres)

	FTEs		Floorspace (sq. metres)	
	total	pa.	total	pa.
Office (B1a & B1b)	330	21	7,290	456
Manufacturing (B1c & B2)	-350	-22	-12,930	-808
Distribution (B8)	70	4	5,440	340

Source: Calculations by Hatch Regeneris, 2018.

Please note: Total FTE job numbers are rounded to the nearest multiple of 10, whilst annual FTE job numbers are rounded to the nearest multiple of 5.

7.20 The table below shows demand for employment land in the district once expected changes in employment floorspace are converted into employment land need using plot ratios. Table 7.6 highlights the need for 0.73 hectares of employment land for office developments and 1.09 hectares for distribution (B8), whilst demand for manufacturing (B1c and B2) is expected to decline by -3.23 hectares.

Table 7.6 Employment land requirements in Tendring 2017-33 hectares

	Office (B1a & B1b)		Manufacturing (B1c & B2)		Distribution (B8)	
	2017-33	pa.	2017-33	pa.	2017-33	pa.
Labour Supply	0.73	0.05	-3.23	-0.20	1.09	0.07

Source: Calculations by Hatch Regeneris, 2018

Past Completions Scenario

7.21 Past trends in the completion rates of employment floorspace offer an alternative view of how the demand for employment space might change in the future. Over a long enough period, these scenarios can be a useful means to identify future trends in demand as they reflect actual development patterns on the ground.

7.22 For Tendring, recent changes in the way in which data is collected on employment land means that data on annual completions over the last five years has not been collected specifically for monitoring purposes/building control completion records. The Council have compiled data on completions, where possible (specifically for the purposes of this report), however it is not consistent. This is particularly the case in regard to the level of detail with which the data was previously collected for building control completion records. To this end, we have set out in Table 7.7 below an analysis of the following sets of data:

- New data for the five-year period 2013/14-2017/18 which has been compiled by Tendring DC for the purposes of this report;
- Previous data for the five-year period 2008/09-2012/13 which was collected and monitored for the district's annual monitoring reports; and
- A combination of the two data sets covering the ten-year period 2008/09-2017/18.

7.23 Table 7.7 below demonstrates the variation in the annual average of net completions depending on whether new data or previously collected data is used. When new data is used for the period 2013/14 to 2017/18 the annual average net completions equate to 260 sq m per annum, compared to 2,688 sq m per annum for the preceding five years based on data that was collected specifically for monitoring purposes.

Table 7.7 Average annual (net) completions in Tendring

		Office (B1a & B1b)	Manufacturing (B1c & B2)	Distribution (B8)	Total
New data: 2013/14-2017/18	Total	72	806	420	1298
	Annual Average	14	161	84	260
Previous data: 2008/09-2012/13	Total	1,071	3,252	9,105	13,428
	Annual Average	214	650	1,821	2,686
Combination: 2008/09-2017/18	Total	1,143	4,058	9,525	14,726
	Annual Average	114	406	953	1,473

Source: Based on monitoring data about net completions for 2008/09-17/18 made available by Tendring District Council.

7.24 The difference in outcomes leads Hatch Regeneris to conclude that the newly compiled data is not sufficiently robust to inform assumptions about likely future demand for employment land. A direct comparison of the newly compiled data and the previously collected data for the period 2008/09-2012/13 confirms this position.

7.25 Hatch Regeneris have therefore elected to use data that was previously collected for monitoring purposes for the period 2008/09-2012/13 to project that average (net) completions forward over the remaining plan period (2017-33). Using data which covers this period is reflective of a time when Tendring's economy will have been experiencing a down-turn followed by a period of recovery in line with the national economy and will therefore avoid over-estimating the likely future requirements for employment land.

7.26 On this basis, it is estimated that between 2017 and 2033 the district could see the delivery of a minimum of c. 3,400 sq. metres of office (B1a and B1b) floorspace; 10,400 sq. metres of manufacturing (B1c and B2) floorspace; and 29,100 sq. metres of distribution (B8) floorspace.

Table 7.8 Floorspace requirement based on 5-year delivery

		Floorspace	
		total	pa.
5-year average	Office (B1a & B1b)	3,400	200
	Manufacturing (B1c & B2)	10,400	650
	Distribution (B8)	29,100	1,800

Source: Calculations by Hatch Regeneris, 2018.

7.27 Using the same assumptions on plot ratios as those used when assessing economic forecasts, the floorspace requirements identified in the table above can be converted into employment land requirements in the district for the period 2017-33. Table 7.9 below shows that based on the 5-year average completions rate, the demand for land between 2017-33 is expected to be 0.3 hectares for office (B1a and B1b) uses, 2.6 hectares for (B1c and B2) manufacturing uses, and 5.8 hectares for distribution (B8) uses.

Table 7.9 Employment land requirements in Tendring 2017-33, hectares

	Office (B1a & B1b)		Manufacturing (B1c & B2)		Distribution (B8)	
	2017-33	pa.	2017-33	pa.	2017-33	pa.
5-year average	0.3	0.02	2.6	0.2	5.8	0.4

Source: Calculations by Hatch Regeneris, 2018

Comparison of Scenarios

7.28 Table 7.10 below provides a summary of the outputs of each scenario of future employment land requirements and indicates the following:

- For B1a/B1b uses, all forecast scenarios concur there will be additional demand for land for these uses ranging from 0.3 ha (past completions scenario) to 1.72 ha (Experian forecasts).
- For B1c/B2 uses, the past completions scenario results in anticipated growth in requirements for land of around 2.6 ha (0.2 ha per annum). By contrast, the other forecast scenarios expect there to be a decline in demand for land for these uses ranging from -1.99 ha to -3.23 ha. The Experian forecast scenario and the labour demand scenario are closely aligned on the expected surplus of land with -2.69 ha and -3.23 ha respectively.
- For B8 uses, with the exception of the EEFM scenario, all other scenarios anticipate there being additional demand for land to meet the requirements of these uses ranging from 1.09 ha (labour supply) to 5.08 ha (past completions). Our view is that the past completions data is a less reliable scenario on which to plan based on the fact that there have been issues over the quality of the data. Our view is that the Experian forecasts (which have been adjusted to reflect the specific nuances of Tendring) together with the Labour Force Scenario should be used.

7.29 On this basis, our preferred scenario is as follows:

- B1a/b: Tendring should plan on the basis that there will be a requirement for between 0.73 and 1.72 ha of B1a/B1b land;

- B2: Tendring should assume that there is likely to be a reduction in the net requirement for space somewhere between -2.69 and -3.23 hectares. In many cases demand will be met through re-use of existing sites, but this should be monitored, and specific allocations may be required to meet identified need.
- B8: Tendring should plan on the basis that there will be a requirement for between 1.09 and 4.28 ha of B8 land.

7.30 In adding together these use classes, this would suggest a requirement for between -0.87 ha and 2.77 ha of land in Tendring.

Table 7.10 Summary of Employment land requirements in Tendring 2017-33

		FTEs		Floorspace (sq m)		Land (ha)	
		Total	p.a.	Total	p.a.	Total	p.a.
Experian 2017	B1a/ B1b	754	47	17,211	1,076	1.72	0.11
	B1c/ B2	-309	-19	-10,759	-672	-2.69	-0.17
	B8	230	14	21,420	1,339	4.28	0.27
EEFM 2017	B1a/ B1b	211	13	4,992	312	0.50	0.03
	B1c/ B2	-214	-13	-7,951	-497	-1.99	-0.12
	B8	-49	-3	-3,762	-235	-0.75	-0.05
Labour supply	B1a/ B1b	329	21	7,292	456	0.73	0.05
	B1c/ B2	-351	-22	-12,931	-808	-3.23	-0.20
	B8	71	4	5,439	340	1.09	0.07
Past Completions	B1a/ B1b	-	-	3,400	200	0.3	0.02
	B1c/ B2	-	-	10,400	650	2.6	0.2
	B8	-	-	29,100	1,800	5.8	0.4

Source: Calculations by Hatch Regeneris, 2018

8. Supply Assessment

Summary

- Tendring's Emerging Local Plan identified eight employment allocation sites in Tendring. These have been reviewed to update their status and continued availability to the market. It is concluded there is **16.63 ha of allocated employment land available** to the open market and deliverable within the planning timeframe.
- In addition to the allocated employment sites, there is **27.6 ha of employment land** supply in Tendring with **outstanding planning approvals** (outline or detailed).
- **Other sites**, that are not allocated or have a current approval, but that may be suitable for employment land development, **amount to 53.1 ha**. Significant further investigation is required of these sites to determine their deliverability, however, they may provide longer-term potential for employment land provision.
- All sites comprising the supply of employment land have been assessed for quality using an objective scoring system out of 100 across ten individual measures. The nature of Tendring mean that all sites are removed from the motorway network, and some from a rail station. Therefore, none of the sites are able to score full marks for strategic highway proximity and a limited number are serviced by public transport availability.
- Those sites to achieve relatively high scores including Stanton Europark (score 81), Lanswood Park (score 73) and Land at Brook Park West (score 73). These relatively high scores are largely accounted for by their strategic position and prominence to one of Tendring's major A-roads (A133/A120).
- The existing portfolio of sites has also been assessed in terms of quality using a similar scoring system. Several have been assessed as 'poor quality'. However, it is important to note that a number of these are still playing an important role in meeting the needs of occupiers undertaking lower order activities and should continue to be protected in line with the recommendations set out within this Chapter.
- A small number of sites have been identified as not being suitable for continued employment use beyond the requirements of their current occupiers due to their poor quality and location. These include Harmers Foundry, Walton-on-the-Naze; SATO Site, Harwich; and Durite Works, Harwich. The latter two sites have plans attached to demolish existing premises on site for housing.

Introduction

8.1 This chapter looks at the existing portfolio of potential employment land in the study area, not only how much there is, but also its quality, type, suitability and availability. Part of this analysis is ensuring that there is adequate choice of employment land for prospective developers and occupiers. A solid understanding of the current supply is required prior to projecting future land demand for Tendring.

Land Supply

Local Plan Sites

8.2 Tendring District Council's 2017 Local Plan has been used as a basis for the review of employment land supply. The Local Plan identifies employment allocations, including regeneration areas and other employment land allocations, as well as existing employment land.

8.3 Tendring District Council's 2017 Local Plan (the Emerging Local Plan) identifies eight sites in Tendring with a total of 21.13 ha. These sites have been reviewed to update their status and continued availability to the market. All but one of these sites – the Tendring Garden Borders Community – are sub-5.0 ha. Table 8.1 below details employment allocation listed in the above Local Plan.

Table 8.1 Employment Allocation Sites in Emerging Local Plans				
Site Name	**Area (Ha)**	**Planning Status**	**Comment**	**Development Potential**
Land West of Carless Refinery, Parkeston	4.5	Employment allocation in Emerging Local Plan. SAE1 identifies site as extension to existing refinery. No current planning application.	Mostly flat site, alongside railway corridor. Partially treed, though mostly cleared. Removed from sensitive uses.	Appropriate for its intended use as an extension to the existing refinery. Not likely to be developed for typical B-class employment buildings.
Stanton Europark, Parkeston	3.3 (2-4 in Local Plan)	Employment allocation in Emerging Local Plan, for 2-4ha of B2/B8 along with retail and leisure. Lapsed planning consent for mixed B-class uses. Revised planning application anticipated, but postponed due to Local Plan going to EIP.	Full site includes existing retail park uses, a Morrison's store adjacent. Vacant areas are flat and with good access. Close to port uses. Southern portion of site (0.85ha) earmarked for employment element of development, with retail earmarked for the rest. Several retail occupiers in talks. Agent reports that ideally the whole site would go to retail uses, given that there is limited demand for B-class uses in Harwich. Sites are however separate and could easily accommodate employment uses. Employment space will comprise small, sub-divided and flexible SME space.	Vacant areas appropriate for a mix of B-class uses, predominantly industrial and warehousing. Likely to be pressures for further retailing, rather than B-class uses. Recommended to protect site for B-class uses.
Tendring Colchester Borders Garden Community	6	Employment allocation in Emerging Local Plan. Broad location for Garden Community in Emerging Local Plan.	Broad area identified in Emerging Local Plan for 1,250 dwellings and employment uses. Requires significant further investigations to determine landholdings and develop masterplans. Issues of land ownership, site preparation – services and infrastructure, and specific allocation of employment land must be addressed in the form of a Masterplan for the site.	Appropriate to incorporate an employment element. Employment land should have high visibility and access to A120 and/or A133. Would need to ensure that residential developments do not preclude development of employment uses.
Mercedes Site, Harwich	3	Employment allocation in Emerging Local Plan, which states that site has potential for intensification of current	Flat site, partially occupied by Grange Fencing. Appropriate for storage and warehousing to support the port uses.	Develop in line with Emerging Local Plan. Opportunities for a short to

		uses, including potential for open storage and warehouse (5,000 sqm)	Strong access links from roundabout off A120 Existing business on site which would be expected to remain Possible flood and contamination risk for site Some infrastructure work required, however good accessible site.	medium term development. Access points are secured.
South of Thorpe Road, Weeley	1	Employment allocation in Emerging Local Plan, part of a mixed-use scheme including 280 dwellings, 1 ha of employment land, open space, primary school. Outline application currently under consideration, including up to 3,000 sqm of B1 offices	Rose Builders looking to bring employment site forward in period 2020-25 and report no physical constraints limited development. They would look to develop small office suites.	Appropriate for intended B1 office suites of a small scale, although likely to be only a limited market in this location.
Land South of Long Road, Mistley	2	Employment allocation in Emerging Local Plan. Outline permission for 2 ha of employment land and 300 dwellings. Current application to increase dwellings to 485 (and to retain employment land). This site is the subject of a planning appeal scheduled to be determined in 2019.	Flat land. Some poor access via country roads, including to south-east corner of site, where the intended employment uses would be located. This would require upgrade to Clacton Rd/Dead Ln intersection and access points. Landholder reports no significant constraints and that they would not build employment uses speculatively. Currently informally marketing the site for employment but no firm interest.	Employment uses would be remote from similar uses elsewhere in Manningtree/Mistley. Based on market appraisal, development potential would likely be for very small units – offices and workshops. 2 ha of employment land is likely to be a long-term prospect. Potentially a question over viability with road access and servicing required.
EDME Maltings, Mistley	0.13	Employment allocation in Emerging Local Plan, which identifies at least 0.13 ha to be retained for employment in the redevelopment of this site. Local Plan states that this retained area should match current employment levels of full site.	Emerging Local Plan anticipates the redevelopment of this site, with the relocation of EDME. Redevelopment requires masterplanning which should identify and support the employment element for the site.	Development potential is likely to be for small scale office units on site, as part of the mixed use redevelopment. Note that retaining employment levels on a significantly smaller site requires a higher employment density, inferring B1 office uses.
Lanswood Park, Elmstead	1.2	Employment allocation in Emerging Local Plan.	Requires infrastructure investment to open up further stages of Lanswood	Roll-out of further employment stock, similar to existing uses at Lanswood Park. Potential for low impact, light

			Park, notably increasing electricity capacity.	industry workshops or hybrid office/industrial spaces to broaden uses.
Emerging Local Plan Total Area	**21.13**			

Source: Emerging Local Plan, planning applications, conversations with landholders, BE Group assessment

8.4 The employment allocations as outlined in the Emerging Local Plan total some 21.13 ha. From a review of these sites, there is a reasonable prospect of all of these sites being developable within the planning timeframe.

8.5 The Land West of Carless Refinery site (4.5 ha) would be reserved as an extension of the refinery's operations and is therefore not considered to be available for the open market for B-class uses. Therefore, in understanding supply and demand issues, it is considered that this site should be excluded from the list of allocated sites available for B-class uses in Tendring.

8.6 **The net total land area of employment allocations is therefore 16.63 ha.**

8.7 It should be noted that whilst the Land South of Long Road, Mistley is included in this above total, there is a risk that the viability and location of the employment allocation will mean it will not come forward in the manner outlined in the current Masterplan. However, whilst there is outline permission in place, it has been included at this time.

Other Potential Sites

8.8 In addition to the employment allocations, the study team has been asked to consider a suite of other sites, which have some level of potential for employment. These sites have been reviewed in the table below and have been identified using the following criteria:

- Identified by Council as a potential further employment site, or;
- Have a current planning application, or;
- Has developer interest to bring forward for employment uses.

8.9 Maps for each site are included in Appendix F.

Table 8.2 Other Potential Employment Sites				
Site Name	Area (Ha)	Planning Status	Comment	Development Potential
Extension to Gorse Lane Industrial Estate, Telford Road, Clacton	6.8ha	Outline planning permission for extension of the existing industrial estate for 7,500 sqm of B2 floorspace. Detailed application approved for phases 1 and 1A of 6,500 sqm of B2.	Extension of Gorse Lane Industrial Estate accessed through the internal roads of the estate. Road widths and parking on existing estate may limit access, though should be resolvable. Logical site to extend estate. Site recently sold to local firm with the proposal to develop the site, partly for their own use and partly for other uses.	Developable in short term for B2 uses, similar to existing estate. Provides an obvious extension to current industrial estate.
Land at Brook Park West, Clacton	1.3ha (approx)	Hybrid planning consent for mixed use scheme including detailed approval for retail, hotel, public house, restaurant, retail warehouse. Outline approval for residential and B1 employment.	Masterplan includes employment uses in the north of the site, proximate to the retailing. Council would need to ensure that B1 uses are brought forward as proposed, rather than lost to other uses. Developer reports that infrastructure costs are substantial and requires retail and housing to be brought forward first to finance subsequent development. Developer will however provide infrastructure into the employment area to enable development.	Good location for small B1 uses with workers benefitting from proximity to retail services. Likely to be a medium-term prospect. Speculative build is unlikely but will react to demand.
Land north of Brook Park West development	12ha	No planning consents or applications. Masterplan would be required in order to address the issues of multiple land ownerships and subsequent equalisation of values.	Landholder (Britton Properties) is the developer of neighbouring Brook Park. Site can be developed separately and has frontage to A133 Site is at an entry point to Clacton-on-Sea.	Medium to longer term opportunity for a mix of B-class employment uses. High profile site should be protected at this stage for employment. May be a mix of uses in full 12 ha site.

				Road infrastructure also required as part of larger, mixed-use development.
Land at Harwich Valley, East of Pond Hall Farm, Dovercourt	6.3ha (approx)	Outline/hybrid planning consent for mixed-use development, including B1, B2, B8 uses. Consent expires in 2019.	High profile, greenfield site with long frontage on A120. Residential uses to the south. Landholder reports that Sainsbury's has withdrawn interest in a retail-heavy scheme. Likely to redraft plans with focus on residential/B-class uses (current interest in the latter), however landholder is looking to refinance given that original consent was granted for a retail-led scheme.	Good site for a mix of B-class employment uses, as part of wider mixed-used development. Viability would be a key issue, with road infrastructure required to open up sites. Medium to longer term opportunity. Potential for power and flood concerns.
Land at Dale Hall, Cox's Hill, Lawford	0.2 ha	Outline permission for 150 houses and 700 sqm of B1 uses. Housing scheme nearing completion.	Existing buildings to be converted for B1 offices. These buildings are internally within the wider residential scheme and would have very limited profile. Developer has reported that they are marketing the office units off the plan but have had little interest thus far.	Could be a short-term development for offices, but it is unlikely that there is sufficient market for such a use in this location. Likely to be pressure to develop for housing. Not a significant loss to the market if not developed for offices.
Extension to Plough Road Business Centre, Great Bentley	1ha	Land allocated for extension to industrial estate in Adopted Local Plan, but this is not being carried forward in the emerging plan. Outline planning permission 14/01750/OUT granted on appeal for a mixed development including 150 dwellings and 1ha of B1 employment.	B1 development will be extension to existing industrial estate, however both access routes via the eastern edge of existing site are relatively tight and current layout (estate roads, etc) may need to be addressed to accommodate growth. Logical site to extend estate.	Approved phasing plan for mixed-use development shows employment as final phase of development. Site should be included in the emerging Employment Land policy (PP7) and protected for employment use.
Crown Business Centre, Old Ipswich Road, Ardleigh/Colchester	2.31ha	Outline permission for residential development on 0.2 ha of land (following demolition of existing B1a offices and driving range shelter).	Currently in use as golf driving range behind Crown Business Centre. Open, flat site with several trees on site, including a large oak	Very good site near junction of A12 and A120, though potentially on wrong side of intersection. Potential for a mix of B-class employment

		Current application (17/02204/FUL) for the construction of 91 small B1 & B8 use commercial units and the construction of 5 commercial office blocks with B1 use – has recently been granted permission. This will replace outline permission for residential.	tree (which has already been flagged in current application, which is being amended to reflect this) Access to Crown Business Centre is poor (single track) and will need to be addressed to allow any future development.	uses. Would serve Colchester market and thus be in response to demand generated by Colchester growth. Viability a key issue - road infrastructure improvements required, including new access to site from Old Ipswich Road, This scheme is already being marketed by a local property agent as Hudson Park. Current planning application is heavily reliant on small B1 units (25-30 sqm) and broader mix may be appropriate in this location.
Cliphedge Farm, Harwich Road, Little Bentley	1.3ha	Planning Application 17/02014/FUL for two office buildings. Refused.	Site would be developed as purpose built office headquarters for BrandArt UK (relocating from Colchester). Land currently in agricultural use Good access from A120	Good site for rural employment development - good access to A120, though removed from local population. Development needs to be appropriate to its rural environment. Site development will be a single owner occupier, so is not included in allocations total.
Land south west of Horsley Cross	11.2a	Site has detailed approval for a new industrial park with up to 28,280 sqm of B2 and B8 floorspace for B2 and B8 uses.	Strategic, but isolated location. The site is presently open agricultural land, with part being used for weekly car boot sales during March to October. Good access – directly off the A120 Consent granted for bus depot and other B2/B8 uses, however issue over viability of such uses. Agent contact instructs that land is being sold for development but is no longer involved.	Good site for employment development Good access and prominence to A120 Development needs to reflect rural surroundings and be appropriate to the environment. Appropriate to bring forward in line with approval.

Hartley Gardens Strategic Development Allocation	At least 7 ha	Major mixed-use development proposal in the emerging Local Plan, though not yet adopted. No planning permissions in place for this site.	Proposals for Policy SAMU2 include: 800-1,000 new homes of mixed sizes and types to include affordable housing as per the Council's requirements up to 2033; At least 7 hectares of land for employment; 2.1 hectares of land for a new primary school with co-located 56 place early years and childcare facility (D1 use) as required by the Local Education Authority through Section 106 Planning Obligations; 1 hectare of public open space.	Good site for employment land providing employment development has high visibility and access to A133. It is appropriate for employment land to be incorporated alongside new residential development. Potential for high quality, leading business park for Tendring in the medium to long term, comprising offices and clean industrial uses. Masterplan potentially needed to address viability/delivery issues – multiple ownerships, site assembly, and planning/development policies.
Oakwood Park and Oakwood Park Strategic Development Allocation	1 ha	Outline planning permission for residential development of up to 250 dwellings, 2,273sqm of B1c floorspace and open space, with access from Thorpe Road (residential) and from Fowler Road (employment).	Oakwood Park Strategic Development Allocation is a major mixed-use development proposal in the emerging Local Plan - yet to be formally adopted or granted planning permission. This will be extension of a committed development site at Oakwood Park. Site is directly adjacent to existing successful employment area – good occupation levels and few vacancies Mainly in agricultural use Proposals for SAMU3 (Oakwood Park Strategic Development Allocation) do not include employment.	Good site for employment development, adjacent to existing successful employment area Appropriate for new employment land to be promoted here given new large-scale residential development coming forward on adjacent site. Light industrial, in accordance with outline permission, would be appropriate.
Tendring Colchester Borders Garden Community	Unknown	In addition to the 6ha included in the Employment Allocation Sites in Emerging Local Plan, there is an aspiration to deliver a further 4-24ha in the future.	Overall employment area to be reviewed in light of wider review of Garden Community. The 6ha of allocated space supports demand in Tendring to benefit from Colchester travel to work area.	Potential for further employment element to be incorporated alongside additional residential element.

			The source of the site area is unclear and currently being scrutinised by the planning inspectorate. Therefore, it is best to review this location in general terms with no anticipated site size. ***Further information to be provided by Tendring DC***	Employment land should have high visibility and access to A120 and/or A133. Broad B-class employment opportunities are anticipated. Site requires full masterplanning to ascertain scale and types of uses.
Land north of Colchester Rd, Weeley	2.8ha	Employment land as part of a mixed-use scheme promoted by Taylor Wimpey. Subject of an unresolved objection to the Local Plan and a refused planning application 16/01847/OUT which the applicant has decided not to appeal.	Good access off B1033, with strong link to adjacent site at Weeley Green. Track leading off road. Services (including Premier Inn and McDonalds) adjacent to site. Heavy tree line on perimeter, but otherwise flat. Partially in use at weekends as car boot sale, with Landowner expressing a willingness to explore different development options outside of current Taylor Wimpey option. High density tree coverage in parts.	Good location for employment development with direct access and prominence to A133 or B1033 Appropriate location for employment development here, given close proximity to Clacton. Long term aspiration – one of two in close proximity in Weeley. Likely only one site needs to be developed for employment.
Land south of Colchester Road, Weeley	Unknown	Site promoted for mixed use development through the Local Plan but not currently forming part of the plan. Landowner has not sought to continue the site's promotion and has instead been seeking planning permission for housing on a smaller part of the site	Easily accessible from via B1033 or A133 (no link at present). Site is agricultural land - slightly sloping, but no visible further constraints. Services (including Premier Inn and McDonalds) cuts into NW corner and a caravan park is located to the south. Otherwise bounded by highways and railway to the south. Slightly sloping.	Good location for employment development with direct access and prominence to A133 or B1033 Appropriate location for employment development here, given close proximity to Clacton. Long term aspiration – one of two in close proximity in Weeley. Likely only one site needs to be developed for employment.
Tendring Central Garden Village concept, Frating	Unknown	Concept previously promoted for inclusion in the Local Plan but not supported by TDCl and not	Flat site – in agricultural use at present No visible constraints,	Good location for employment – any employment development must ensure frontage and access to A133 Site also in close proximity to A120

		being actively promoted at this time	Site not being actively promoted for development, but appears to be a potentially good location for businesses - adjacent to existing employment area and good prominence and access off A133	Development should be close to other business uses/ away from residential properties at north and north west of site.
Lifehouse Spa, Thorpe le Soken	Unknown	Site had an application for a major mixed-use development including 1,000 sqm of business units, however, this was refused. Subsequent application has also removed mixed-use element, with focus on housing. No plans for employment element. Going to inquiry in October 2018.	Good access via existing access road to Hotel and Spa. Masterplan details a further entrance to the potential development to the east of the current entrance. Southern residential section of site is accessed via fast road (B1414) but could provide strong access to the entire site. Land is slightly sloped towards a pond on the western side of the site, however this has been built into masterplan. Slightly sloped, with pond on site.	It is doubtful that there is a sufficient market for business units in this location. There is not an obvious office or industrial market that would require collocation with a spa hotel in this location. The site lacks prominence from a B-class employment perspective.
A120 west of Little Bentley	2.2ha	Land being promoted for inclusion in the Local Plan for employment/road side services.	Land currently in agricultural use. No obvious constraints, though would need considerable infrastructure investment to bring to the market. Heavy tree line on site.	Reasonable location for employment – any employment development must ensure frontage and access to A120, though with little population in vicinity would limit market for site to rural economy.
Land south of Manheim Auctions and TBS, Frating	23.0ha	No planning status and not being actively promoted by landholder.	Flat site – in agricultural use at present No visible constraints, Site not being actively promoted for development but appears to be a potentially good location for businesses. Adjacent to existing employment area and good prominence and access off A133	Good location for employment – any employment development must ensure frontage and access to A133 Site also in close proximity to A120 Very large site, unlikely to be fully required for employment uses within the planning horizon.

Land east of Lanswood Park, Elmstead Market	2.5ha	Lanswood Park is an existing allocation in Emerging Local Plan. However, there are also proposals for the Eastern expansion of the existing business park	The site already has outline permission for three additional buildings. In addition, the landowners are discussing with the council the eastwood expansion of the business park along with residential 'enabling development' on additional land further east. Requires infrastructure investment to open up further stages.	The land being indicated for business park expansion is approximately 2.5ha and the promoter is suggesting it will accommodate 12,000 sqm of additional commercial space. Potential for low impact, light industry workshops or hybrid office/industrial spaces to broaden uses.

Source: Planning applications, conversations with landholders, BE Group assessment, advice from Council planning officers

8.10 The additional sites represent some 78.4 ha of additional land with some potential for employment uses. This is an approximate figure as some of the sites have yet to have a firm quantity set aside for employment.

8.11 Of these, Table 8.3 details those sites which have approval (outline or detailed) for employment uses. These total 27.8 ha.

Table 8.3 Additional Sites, with Planning Approval

Site Name	Size (ha)
Extension to Gorse Lane Industrial Estate	6.8
Land at Brook Park West	1.3
Land at Harwich Valley	6.3
Land at Dale Hall	0.2
Extension to Plough Road Business Centre	1.0
Land South West of Horsley Cross	11.2
Oakwood Park	1.0
Total	**27.8**

Source: BE Group, 2018

8.12 It is however considered that Land at Dale Hall is not likely to have a realistic chance of coming forward and thus should be removed from the list of sites. **Therefore, current approvals (outline or detailed) provide an additional 27.6 ha of employment land supply available for Tendring.**

8.13 Furthermore, Table 8.4 details those sites which do not have an employment allocation in the Emerging Local Plan and do not have a planning approval (although it should be noted some are awaiting a decision) but would be appropriate sites for employment uses in Tendring, ***if there is sufficient demand***. These sites have a total land area of 53.1 ha.

Table 8.4 Additional Sites, without Planning Approval

Site Name	Size (ha)
Land North of Brook Park West Development	12.0
Crown Business Centre	2.3
Cliphedge Farm	1.3
Hartley Gardens Strategic Development Allocation	7.0
Land North of Colchester Road	2.8
A120 West of Little Bentley	2.2
Land South of Manheim Auctions and TSB	23.0
Land East of Lanswood Park	2.5
Total	**53.1**

Source: BE Group, 2018

8.14 **Therefore, current potential sites (without planning) provide an additional 53.1 ha of employment land supply available for Tendring.** It should however be noted that this figures includes 2.8 ha at Land North of Colchester Road, which is no longer being pursued by the developer. The figure also includes 23 ha at Land South of Manheim Auctions and TSB, where it is unlikely to be appropriate or viable to develop the full site. Therefore, the total land area figure should be treated with caution, whilst only representing potential options for Tendring, should further sites be necessary.

8.15 For all of these sites without planning support (either through allocations in the Local Plan or current permissions), significant further investigations would be required to determine the viability and deliverability of these sites. However, at this stage they could be considered as a potential suite of sites that *could* provide a next wave of employment sites in the medium to long term.

8.16 There are also a number of other sites that we consider may be appropriate for employment development, but where the quantity of employment land has not yet been assessed. These are:

- Tendring Colchester Borders Garden Community
- Land South of Colchester Road
- Tendring Central Garden Village.

Supply in Surrounding Areas

8.17 Neighbouring authority areas of Colchester Borough and Babergh District would also provide a potential source of supply for businesses looking for employment land in the broader area.

8.18 In Colchester Borough, key considerations for employment land that may impact on Tendring are those that connect with the A120 and A133 and thus have good links into Tendring District. Key sites in Colchester would therefore be the remaining sites at Colchester Business Park (2.2 ha) and sites at the Knowledge Gateway (7.0 ha), which are likely to attract different markets to those who are likely to consider Tendring sites. Colchester also offers a wider array of business and economic links. For the Knowledge Gateway specifically, the proximity to the University of Essex would also be a key consideration. These businesses would be prepared to pay the premium in comparison to Tendring locations for these location characteristics.

8.19 In terms of the Babergh District Council area, the employment area at Brantham is of most relevance, being close to the border, in particular settlements of Manningtree and Mistley. The Brantham industrial estate is an important estate in the locality with the Babergh Local Plan encouraging a renewal and redevelopment of older elements of the estate to enhance its employment function. This potentially has implications for the market for employment sites in Manningtree and Mistley as this corridor will only have a small, localised market.

Summary

8.20 Table 8.5 summarises the above analysis for the three categories of land – those with allocations in the Emerging Local Plan, those with outline or full planning consent and other potential sites without planning approval. The table below lists the net totals, that is removing sites that have been considered to be unlikely to be deliverable for employment uses or that are not available to the wider market (i.e. already committed to a particular use).

Table 8.5 Net Available Land

Land Type	Size (ha)
Allocated Land in Emerging Local Plan	16.63
Additional Sites, with Planning Approval	27.60
Total Sites with Planning Support	**44.23**
Potential additional Sites, without Planning Approval	53.10
Total	**97.33**

Source: BE Group, 2018

8.21 Therefore, Tendring District has some 44.23 ha of employment land that is available to the market and has some level of planning support. In addition, a further 53.10 ha of land could potentially be developed for employment uses, although would require further investigations and planning approvals.

Site Quality

8.22 All sites have been graded using a standard scoring system that consists of objective measures (as far as possible). Each site is scored out of 100, made up of ten individual measures, each scored out of ten. These are:

- Proximity to the strategic highway network
- Prominence
- Access to public transport
- Sequential testing
- Planning status
- Access to services
- Constraints
- Environmental setting
- Flexibility
- Availability

8.23 The scoring system is provided in Appendix A and the scoring matrix is in Appendix B.

8.24 Two scores are provided in Table 8.6, a total score and a market-led score, which reflects the locational strengths and weaknesses of each site. The market-led score is made up of just strategic highway proximity, prominence, sequential testing, environmental setting and flexibility. These are the characteristics that are very difficult to improve. The other five aspects (public transport, planning status, services, constraints and availability), which combine to make up the total score, are potentially easier to improve through specific interventions and hence provide the ability to raise the quality of a site.

8.25 The particularities of Tendring mean that all sites are removed from the motorway network, and some form a rail station. Therefore, none of the sites are able to score full marks for strategic highway proximity, and only a limited number are serviced by public transport availability.

Table 8.6 Employment Allocations - Site Scoring

Name	Size (ha)	Score (Max 100)	Market-led, Sub-Total (Max 50)	Likely Use Type
Stanton Europark, Parkeston	3.3	81	41	Office / Industrial
Lanswood Park, Elmstead	1.2	73	36	Office / Industrial
South of Thorpe Road, Weeley	1.0	61	31	Office
Mercedes Site, Harwich	3.0	69	35	Office / Industrial
Land South of Long Road, Mistley	2.0	63	29	Office / Industrial
Land West of Carless Refinery, Parkeston	4.5	63	27	Industrial
EDME Maltings, Mistley	0.13	61	26	Office

Tendring Colchester Borders Garden Community	6.0	55	36	Office / Industrial

Source: BE Group, 2018

8.26 Stanton Europark scores the highest mark, both in terms of market-led sub-total and total score. This is in part due to its strategic location and prominence relative to the A120, but also due to a high score on a number of key features including public transport, environmental setting and availability.

8.27 Similarly, good environmental setting and availability also contribute to the high score achieved in both scenarios by Lanswood Park in Elmstead. A lack of immediate constraints also lends Lanswood Park (which otherwise struggles in terms of its highway links and public transport) a strong assessment score.

Table 8.7 Additional Sites, with Planning Approval - Site Scoring

Name	Size (ha)	Score (Max 100)	Market-led, Sub-Total (Max 50)	Likely Use Type
Land at Brook Park West, Clacton	1.3	73	39	B1
Oakwood Park Strategic Development Allocation	1.0	70	34	B1
Extension to Plough Road Business Centre, Great Bentley	1.0	67	28	B1
Extension to Gorse Land Industrial Estate, Clacton	6.8	64	30	B2
Land at Dale Hall, Cox's Hill Lawford	0.2	63	24	B1
Land South West of Horsley Cross	11.2	63	37	B2, B8
Land at Harwich Valley, Pond Hall Farm, Dovercourt	6.3	57	32	B1, B2, B8

Table 8.8 Additional Sites, without Planning Approval - Site Scoring

Land North of Colchester Road, Weeley	2.8	60	38	B1
Land North of Brook Park West, Clacton	12.0	59	38	B1, B2, B8
Hartley Gardens Strategic Development Allocation	7.0	53	38	B1, B2
Land South of Manheim Auctions and TSB, Frating	23.0	50	34	B1, B2, B8
Crown Business Centre, Old Ipswich Road, Ardleigh	2.31	48	28	B1, B8
Cliphedge Farm, Harwich Road, Little Bentley	1.3	43	28	B1
A120, West of Little Bentley	2.2	40	31	B1

Source: BE Group, 2018

8.28 As is illustrated above, some sites score reasonably highly, notably on account of their strategic position and prominence relative to one of Tendring's major A-roads. Sites such as the Land at Brook Park West in Clacton and the Land North of Colchester Road in Weeley score well in this regard.

8.29 The quality of most sites is also reflected in their strong environmental setting and flexibility, the scores of which feed into the notably healthy market-led sub-total for each.

8.30 As noted above, three sites – Tendring Colchester Borders Garden Community, Land South of Colchester Road, and Tendring Central Garden Village – have not been assessed and scored, given that the quantity and position of employment land has not yet been identified.

Existing Employment Areas

8.31 The following table lists and describes the existing employment areas in Tendring, based upon the areas identified in the Tendring District Local Plan. The commentary has been based upon inspections of the existing employment areas.

Table 8.9 Existing Employment Areas

Address	Area	Core Uses	Commentary	Opportunities for redevelopment/expansion
Ford Road (Newman Industrial Estate	Clacton-on-Sea	B1, B2	Small industrial estate close to the Town Centre. Primarily older, lower quality units, some with substantial yard space. High rate of occupancy across the site. Site is bounded by high-density residential area, with allotments to the south.	Some units are supplied with good yard space (i.e. low development density) which may allow for future infill development, however no further remaining land within site boundary.
Oakwood and Crusader Business Park	Clacton-on-Sea	B1(a), B1(c), B2, B8	Large employment area comprised of Oakwood in the north (industrial) and Crusader in the south (office, industrial). Oakwood is comprised of larger units of average/good quality. Crusader includes smaller industrial premises and office development.	Current site fully developed. Land to the north is allocated as site SAMU3, albeit with no part allocated for employment. This area has seen the most recent additional development with some additional units being provided off Fowler Rd.
Gorse Lane Industrial Estate	Clacton-on-Sea	B1(a), B1(c), B2, B8	Significant, operational employment area and Clacton's largest. More established than nearby Oakwood. Mix of smaller terraced and larger, two-storey industrial/warehouse units, with some historically lost to other uses (e.g. gym and children's play area).	Sits to the south of Oakwood Park Strategic Development Allocation off Telford Road (6.8 ha). Question over suitable access to be raised via current highways.
Valleybridge Road Industrial Estate	Clacton-on-Sea	B1(a), B1(c), B2, B8, A1	Mix of larger retail at the entrance off Valley Road in converted industrial units, with traditional industrial estate occupying the remainder of site. Brick/faded clad facades. High occupancy levels. Some office content in the eastern section of the site.	Land-locked industrial estate, no capacity for expansion.
Oxford Road Industrial Estate	Clacton-on-Sea	A1, B1(a), B2	Irregular layout comprising a row of trade counter uses, with more traditional industrial units to the north	The Silverton site in the north is the subject of Local Plan representations and a number of unsuccessful

			of a better quality. ASDA store at the northern-most point.	planning applications to revert to residential.
Sadds Yard	Clacton-on-Sea	B1, B2	Small industrial estate. Small and primarily terraced units. Employment area previously allocated in the emerging Local Plan for mixed-use development.	The site was previously identified in a Town Centre regeneration plan as a potential 'opportunity site' for redevelopment alongside the upgrading and improvement of the railway station.
SATO Site, Valley Road	Harwich	B2, B8	Single business site of SATO, a labelling company. Self-contained site, generally bound by residential use. The site incorporates an historic factory, which SATO intend to redevelop for housing, as well as a new facility and significant greenspace.	Old factory to be developed with 38 homes.
Durite Works, Valley Road	Harwich	B2, B8	Single business site occupied by Durite. Self-contained and generally bound by residential use. Site incorporates existing Durite facility, with a small level of associated greenspace.	Some capacity for expansion on site, otherwise bounded by residential to the south and west. Harwich Valley development site located to the north. Landowner has plans to rebuild factory premises on site and use land for housing.
Europa Way	Parkeston	B2, B8	Established employment area. Site comprises five separate industrial/warehouse building with appropriate yard areas. Good prominence and strategic location (both highway and port) with access directly off the A120.	No visible options for expansion on site. Vacant land to the east and west.
Mercedes Site, Bathside Bay (also an employment allocation site in Emerging Local Plan)	Harwich	B2, B8	The site comprises flat, open land which has the potential for open storage as well as a large industrial warehouse of around 5,000 sqm. Part of site is under use as timber yard (fencing).	Much of the site is used for storage and therefore offers room for intensification of the existing proximal port facilities. The wider Bathside Bay project has secured planning permission which is subject to a condition that

				development must be commenced before 2021 (10/0202/FUL). It is considered that the Mercedes site will aid the enabling of this permission by providing a site for the relocation of an existing small boat quay, as well as further facilities.
Kirby Cross Trading Estate, Clare Road	Kirby Cross	B1(c), B2	Small industrial employment area with good range of one and two-storey industrial units. Occupiers appear generally long-term, with tenants geared towards MOT and car body repairs.	There is vacant land at the eastern end of the site which has been allocated for employment use in previous versions of the Local Plan. There have been unsuccessful attempts to obtain planning permission for a discount food store, but little commercial interest otherwise. Access to land is however not compromised via existing site.
Harmer's Foundry	Walton-on-the-Naze	B1(a), B1(c), B2	Poor quality industrial area primarily occupied by scrap and timber merchants. No visible vacancies, with occupants generally comprising long-term tenancies.	No current expansion opportunities within the bounds of the current employment area. Bounded to the north and south by areas of heavily wooded land.
Lawford Dale Industrial Estate	Manningtree	B1(a), B1(c), B2	Moderate/good quality established industrial employment area, comprising a number of different schemes. Some office content, however primarily an industrial location. Some poor examples of long-term vacancies.	Small parcel of land in the north of the site, to the east of Ace Auto Salvage. Sizeable yard space configuration allows for large commercial vehicles, plus potential for individual unit expansion.
EDME Maltings	Mistley	B2	Intensely developed and operational cereal mill facility, occupied by EDME. Mix of mill buildings and large storage tanks with little circulation space for vehicles.	Historically suitable for occupiers, however we understand that EDME are now looking to vacate, indicating that the site is reaching the end of its life as a primarily employment area.
Crisp Maltings	Mistley	B2	Maltings Facility in full operation and lying adjacent to residential development.	Intensely developed site with no apparent opportunities for development.

Mistley Marine	Mistley	B2	Riverside site encompassing marine related engineering occupiers. Boat storage and moorings also present.	Presumption that any future development would be a comprehensive scheme also encompassing the neighbouring Mistley Port.
Mistley Port	Mistley	B2	Operational port. Based on the riverside and occupied by a number of marine/port related uses	Presumption that any future development would be a comprehensive scheme also encompassing the neighbouring Mistley Port.
Morses Lane Industrial Estate	Brightlingsea	B1(c), B2	Good quality, small industrial estate. Well occupied and established. Primarily standard industrial premises with recycling/scrap yard in the north.	Small parcel of land for potential expansion to the east of existing site, with land also to the north.
Shipyard Estate	Brightlingsea	B1(c), B2	Large shipyard estate with a number of poor quality older industrial buildings. Some level of dereliction amongst the long-term vacant units on site.	A number of derelict units may require redevelopment. Land to the north with potential capacity for development – allocated as part of the coastal protection belt.
Old Ipswich Road	Ardleigh	B1(c), B2	Small employment area comprising two unconnected sites in separate ownership. Mix of industrial and portacabin-style office units with large associated yard space.	Crown Business Park site sits to the south as what is currently a golf driving range. Also, potential opportunity to expand on yard space on current site. Crown Business Park expansion to the south.
Lanswood Park	Elmstead Market	B1(a)	Modern office park offering Grade A accommodation in semi-detached units. Presents as the highest quality office offer in Tendring.	Phases 2 and 3 of current masterplan under construction – two new office units in the same configuration as existing. Current masterplan in place to develop further. Grange park housing development to the east (Hills Building Group). Site to the south allocated in Emerging Local Plan for expansion site.

Plough Road Centre	Great Bentley	B1(a), B2	Small business centre comprised primarily of industrial units with element of office at the entrance, comprising four buildings. Generally good quality office and industrial units with a mixture of traditional two-storey units and covered workshops.	Allocated land for expansion to the east. Current access is potentially suitable, however would need improvement due to density of units in current configuration.
Martell's Pit Industrial Estate	Ardleigh	B2	Small industrial estate surrounded by quarry and scrap/recycling uses. Only a small number of units on site, which are well occupied. Poor, rural location with single track access.	Greenfield land to the north and west, however heavily wooded and unlikely to be practicable expansion options. Location and access is rural and could impose logistical restrictions on any future development.
Rice Bridge Industrial Estate	Thorpe-le-Soken	B1(a), B2	Small industrial estate close to the railway station comprising a number of small units. Generally average and poor industrial premises with average quality office building at the entrance. A pylon sits on the edge of site, however lines only run adjacent to current boundary.	Land with good current access to the east of current employment area. Large yard space also in the easternmost point of the site potentially presents an option for expansion of MOT centre, or new build.
Frating Site	Frating	B1, B2, B8	Employment area comprising two good quality, large scale distribution centres (Random House and Manheim Auctions) and smaller industrial estate.	Potential room for expansion to the north on the Random House site, but entire area sits on the southern border of the New Garden Village Masterplan. Further employment land is detailed in this masterplan to the east, on the other side of the A133.

Source: BE group, 2018

Site Quality

8.32 All existing employment areas have been graded using a standard scoring system that consists of objective measures (as far as possible). Each site is scored out of 90, made up of nine individual measures, each scored out of ten, in a similar manner to the employment allocations. These are:

- Proximity to strategic highway network
- Prominence
- Public Transport
- Sequential test
- Ability to Expand
- Access and Congestion
- Interface with Neighbouring Sites
- Building Quality and Condition
- Site Amenity.

8.33 The scoring system is provided in Appendix C and the scoring matrix is in Appendix D.

8.34 The existing employment areas have the same broad limitations as the employment allocations critiqued above, with all sites removed from the motorway network. Therefore, none of the sites are able to score full marks for strategic highway proximity. Further to this, given that Tendring is serviced by two major A-roads (A120 and A133) a decision has been made to offer higher priority to the A120 when assessing strategic highway proximity and prominence. The scoring breakdown for each existing employment areas is available in Appendix D. Those sites that scored well had prominent locations, good amenity and limited issues regarding congestion, access or neighbouring uses.

8.35 However, a key use of this scoring process is to provide a foundation for identifying existing employment areas that are no longer meeting the market needs as employment uses and that potentially may not be protected in the Local Plan. The employment areas that scored the lowest are listed in Table 8.10. Other sites in Appendix D scored higher in the analysis and are recommended to be retained for employment.

Table 8.10 Poorly Scoring Existing Employment Areas

Employment Area	Score (Max 90)	Comments and Recommendation
Harmer's Foundry, Walton-on-the-Naze	20	This is a poor quality industrial estate, primarily comprised of timber and scrap yards. Access is compromised, coming solely from a narrow residential street. Site also sits between a caravan park to the west and residential streets to the east, on which operations will impact. Location is also generally isolated relative to a number of employment sites in the Tendring District, with poor prominence and no direct access to other strategic routes. **Recommendation: Site is not protected for employment uses.**
Shipyard Estate, Brightlingsea	26	A large shipyard estate comprising a number of historic industrial premises, some showing signs of dereliction. Although not restricted by neighbouring uses, current

		site suffers from poor commercial vehicle access via single track road and an unavoidable route through residential uses. Prominence and access to strategic routes is very poor. Provides an important marine industry purpose, including chandlery, boat refit and maintenance. **Recommendation: Site is protected for employment uses, as a marine industry location.**
Martell's Pit Industrial Estate, Ardleigh	27	Small industrial estate which is surrounded by a quarry and scrap/recycling (open storage) uses. Industrial estate itself is comprised of a small number of poor/average quality units with poor site conditions reflective of the otherwise heavy industrial occupiers. Rural location with generally poor access (Slough Ln is narrow road), however sits close to A120. **Recommendation: Site is protected for employment uses, continuing its lower-order functions of open storage and cheap industrial units.**
SATO Site, Harwich	33	Single business site occupied by SATO, who recently developed a new factory with plans to redevelop the existing site for residential uses. Site itself is restricted by neighbouring residential uses which also compromise access. Poor prominence, although strategic route access is relatively good (though linked to site via residential streets). **Recommendation: Site is not protected for employment beyond the requirements of SATO.**
Durite Works, Harwich	33	Single business site occupied by Durite. Site itself is restricted by neighbouring residential uses which also compromise access. Poor prominence, although strategic route access is relatively good. **Recommendation: Site is not protected for employment beyond the requirements of Durite.**

Source: BE Group, 2018

9. Demand:Supply Balance

Overall Assessment

9.1 The demand assessment suggests there is an overall requirement for between -1.41 ha[7] (Labour Supply scenario) and 8.7 ha (Past Completions scenario).

9.2 We have some concerns over the data provided to inform the Past Completions Scenario and as such the requirement is for between -0.87 ha and 2.77 ha of land in Tendring.

9.3 In terms of supply, a total of 44.23 ha has been identified which has planning approval, comprising of the following:

- 16.63 ha of employment land allocations
- 27.6 ha of additional sites with employment land planning permission (outline or detailed)

9.4 A qualitative review of the sites comprising the total of 44.23 ha has indicated there is a reasonable prospect of these sites being developable within the planning timeframe.

9.5 In addition, the supply assessment has identified sites totalling 53.1 ha without planning approval which could potentially be developed for employment uses including some with Applications that are awaiting a decision. As these sites are not currently supported by planning they would require further investigation but may be suitable as employment sites in the longer term.

9.6 Our review of existing employment sites has also identified a number of sites with the potential for intensification or reuse for employment purposes. These include major employment areas such as Gorse Lane Industrial Estate and Oakwood and Crusader Business Parks in Clacton, the malting and marine sites in Mistley and, most notably, the new modern development of Lanswood Park in Elmstead Market which is continuing to strengthen its offer.

9.7 In quantitative terms, at a district level, there is more than sufficient supply of land to meet future needs even if the most optimistic scenario (8.7 ha) is adopted. However, it is also important to consider the needs of different use classes as these will vary in terms of individual requirements and whether or not these can be met by the available supply. This is considered in more detail below.

Taking account of different use classes

Office and R&D Activities (B1a and B1b)

9.8 All of the demand scenarios agree there will be positive demand for B1a/b floorspace and land over the plan period, albeit on a relatively small scale, ranging from 0.3 ha (Past Completions scenario) to 1.72 ha (Experian 2017 scenario). We advise that Tendring should plan on the basis of ensuring that there is at least 0.73 to 1.72 ha of B1a/B1b land over the period.

9.9 In terms of the supply, it is not possible to be precise about the quantity of supply available for B1a and B1b uses as current allocations and planning permissions do not always specify below B1 uses. However, our analysis in Section 7 of this report suggests:

[7] We have excluded the EEFM 2017 from this analysis as the population error inputs into the model mean that it cannot be relied upon and was used for comparison purposes only

- There is approximately 18 ha of employment land that is either allocated or has current permission for B1 uses, a proportion of which will be available and suitable for B1a and B1b uses.
- There is approximately a further 15 ha of land that is not currently supported by planning but that may become available for B1 uses including office (B1a) and research and development (B1b) in the future.

9.10 In summary, at the district level, there is more than sufficient quantity of land suitable for B1a/b development. However, it is important to note that variations are likely to occur at the more local level and that land may be required to address qualitative issues regarding existing supply.

Industrial (B1c and B2 use class)

9.11 The demand scenarios suggest there is a requirement of between -3.23 ha (Labour Supply scenario) and 2.6 ha/10,400 sq m (Past Completions scenario). Overall, it is likely that there will be an overall net reduction in the requirement for industrial space, but some additional allocations may be required to meet identified needs.

9.12 In terms of the supply, as noted earlier, it is not possible to be precise about the quantity of supply available for B1c and B2 uses as current allocations and planning permissions do not always specify below more general use classes.

9.13 Our analysis in Section 7 of this report suggests there is over 40 hectares of land that is either allocated or with a current planning permission for B1 and B2 uses. This includes land at Gorse Lane which has outline and detailed permission for a total of 14,000 sq m of B2 space. In addition, there is a substantial amount of land which may be suitable for B1c and B2 uses but that is not yet supported by planning.

9.14 At a district level, the supply of industrial land is more than sufficient to cater for the maximum scenario (2.6 ha). At a local level, there may be requirements for land to address qualitative issues regarding existing supply. However, the scale and quality of supply is such that these losses together with any future demand could be met through the allocated and permitted supply.

Warehousing Activities (B8 use class)

9.15 With the exception of the EEFM 2017 scenario, all other scenarios agree there will be positive demand for B8 uses ranging from 1.09 ha/5,439 sqm (Labour Supply scenario) to 5.8 ha/29,100 sqm (Past Completions scenario). We recommend that Tendring should plan on the basis that there will be a requirement for between 1.09 and 4.28 ha of B8 land.

9.16 In terms of the supply, there is around 17.5 ha of land with current planning permissions for mixed B1-B8 uses and around 15 ha of allocations for industrial/warehousing uses.

9.17 At a district level, there is more than sufficient supply to cater for the maximum scenario (5.8 ha). However, it is important to note that variations are likely to occur at the more local level, and that land may be required to address qualitative issues regarding existing supply.

Qualitative Assessment and Recommendations

9.18 The quantitative assessment relates to the overall supply of employment land and floorspace for the District. A detailed assessment of the existing portfolio of sites in the district has been undertaken together with a qualitative review of allocated, permitted and potential sites. Combined with the findings from the property market assessment this allows us to take account of qualitative issues which are relevant to Tendring. Our overarching findings in this regard are as follows:

- Clacton and Harwich continue to offer the greatest range and diversity of employment space and have seen the greatest levels of activity in terms of deals and completions. They will remain important locations over the course of the Plan period.
- Outside of these locations, other smaller markets collectively play an important role in servicing local needs, these include Ardleigh and Elmstead both of which have seen reasonable levels of market activity in recent years.
- Vacancy levels in both the office and industrial market are relatively tight (<5%) and indicate that the market is active but with limited choice and flexibility. There is an ongoing need to provide for modernised employment stock, either through renewal or new development in order to provide greater choice in the market and meet occupier demand.
- Of the existing portfolio of sites, several have been assessed as 'poor quality'. However, it is important to note that a number of these are still playing an important role in meeting the needs of occupiers undertaking lower order activities and should continue to be protected in line with the recommendations set out in Section 7.
- We have also identified a number of sites that will not be suitable for continued employment use beyond the requirements of their current occupiers due to their poor quality and location. These include:
  - Harmers Foundry, Walton-on-the-Naze
  - SATO Site, Harwich
  - Durite Works, Harwich
- In terms of office space, the nature of demand continues to be for smaller scale units with flexible terms. In order to encourage this type of development, the Council may need to intervene to facilitate cross-funding through the delivery of mixed-use sites. There are a number of proposed or allocated sites which have the potential to accommodate this type of development alongside residential and other uses and these should be treated favourably.

9.19 Our remaining conclusions are structured around the key settlements of Tendring.

Clacton-on-Sea

9.20 Clacton-on-Sea is an integral market in Tendring, with a number of key employment sites retaining its status as Tendring's principal town and most important service centre. Little has changed since the previous Employment Land Review in this regard *"with no significant market activity or sector diversification."*

Tendring Economic Strategy (2019): Vision for Clacton on Sea & Jaywick

Vision for Clacton – (Re) Building a Strong Service Centre

Clacton will remain Tendring's most important and busiest service centre but needs a bold response to address the current decline. The quality of the town needs to be a key attractor for new residents and businesses, with new cultural infrastructure supporting an increased regional demand from the region's growing population.

Investment in Clacton's beachfront (including a major £36m scheme to protect and enhance the coastline) has provided a significant opportunity for Clacton to rejuvenate its image and to provide a significant uplift in visitor experience, as well as a draw for new businesses. This needs to be complemented by a higher quality offer of attractions and services serving local communities and new residents. By 2024, Clacton should aspire to be recognised as a distinctive, quality destination by a broad range of visitor groups, particularly across the region.

Given the importance of the local service economy to Clacton, planned housing development and population growth should be viewed as an important component of the town's evolution. Not only will this support improvement, diversification and quality in the town, it will drive demand and local business creation.

Vision for Jaywick – Addressing Long Term Decline Through Citizen Engagement and Participation

Given the persistent high levels of socio-economic deprivation, there is a need for long term investment in both the physical and human assets of the area to enable a positive economic future for Jaywick.

Bold new approaches, built around citizen participation and the building of community capacity, are needed. Residents need to be given a more prominent role in defining and delivering a more prosperous place and defining their role in it.

The response should be locally focussed and long-term, building upon the aspirations of the Jaywick Sands Coastal Community Team to develop a more sustainable and resilient community. This will take time and partners must recognise that short term, success may be measured through a slowing decline, rather than through significant and obvious growth.

9.21 Gorse Lane is the largest operational employment area in Clacton-on-Sea, supplemented by the nearby Oakwood and Crusader Business Parks. Both sites contain a strong mix of B1(a) and B2/B8 industrial premises, across a range of sizes and general quality. Local employment land expansion is likely needed to be focused on these locations, with strong occupancy levels also reported on site. Gorse Lane currently has planning permission for 14,000 sqm.

9.22 Employment space is otherwise supplemented by smaller, secondary schemes, including Oxford Road Industrial Estate and Sadds Yard. The former comprises a row of trade counter units, mostly occupied however showing some age. These schemes do however contain a number of smaller units some sub-100 sqm which raises the issues of a lack of supply in this size bracket.

9.23 Fringe areas such as Jaywick do not have employment allocations themselves but rely on the provision of employment uses in Clacton-on-Sea. The on-going provision of employment land is unlikely to require a separate level in Jaywick, as it would be a preferable outcome in a market of this size to concentrate employment provision around a small number of sites, rather than dilute the provision to a further site in Jaywick.

9.24 Clacton-on-Sea's potential employment sites are of a sufficient scale to meet the demand forecast of all demand scenarios reviewed in Chapter 6.0. The most optimistic scenario suggested a demand for 8.7 ha of land over the forecast period, with Clacton-on-Sea sites providing some 20.1 ha of land, including 8.1 ha with outline planning consents. However, it is recommended that other areas in Tendring also have provision for employment land, rather than concentrating in one settlement.

9.25 Furthermore, the employment sites are appropriate for a range of B-class uses, including offices, industrial and warehousing premises. The Extension to Gorse Land Industrial Estate site would provide the main, near-term opportunity for further B2 and B8 uses. Land at Brook Park West would provide an option for B1 offices, with further land north of Brook Park west being appropriate for a mix of employment uses, though would be a longer-term option.

9.26 Further flexibility in the planning policy for the town centre would help encourage office spaces within the town centre. Small unit offices would be appropriate for the town centre, with a small market for this location. However, it should be recognised that there is likely to be an on-going market preference for edge-of-town/business park locations, rather than town centre premises, despite additional flexibility in the policy. This preference would be driven both by the occupier market, which would seek the parking and access advantages of business park locations and the developer market, which would see a greenfield site as being an ‘easier’ development than a town centre regeneration development (and likely to be more viable).

Site	Area	Size (ha)	Protection	Potential for Development	Potential for Release	Recommendations
Employment Sites						
Extension to Gorse Lane Industrial Estate	Clacton	6.8	✓			Potential to provide additional B2 floorspace at Clacton’s main employment area. Well located and good accessibility. Provides an obvious extension to current industrial estate. **Protect.**
Land at Brook Park West	Clacton	1.3	✓			Good location for small B1 uses as part of a wider mixed-use development. Speculative build is unlikely but will respond to demand. **Should be protected as medium-term prospect.**
Land north of Brook Park West development	Clacton	12.0	✓			High profile site with frontage to A133 however road infrastructure is required, and employment is likely also required as part of larger, mixed-use development. **Should be protected, but likely to be a long-term opportunity.**
Existing Employment Areas						
Ford Rd (Newman Industrial Estate)	Clacton		✓	✓		Potentially some redevelopment and renewal opportunities of older stock, but employment function to stay and be protected. **Protect**
Oakwood and Crusader Business Park	Clacton		✓			Key employment area of Clacton with important economic function **Protect**
Gorse Ln Industrial Estate	Clacton		✓			Key employment area of Clacton with important economic function **Protect**
Valleybridge Rd Industrial Estate	Clacton		✓			Mix of retail and industrial units. Important to retain industrial uses in current footprint. **Protect**

Oxford Rd Industrial Estate	Clacton		✓			Industrial estate is a mix of industrial and trade counter units, with an on-going function **Protect**
Sadds Yard	Clacton		✓	✓		Potential regeneration opportunity, in the medium term connected with the proximity to the rail station. **Consider for redevelopment in the medium term.**

Harwich and Dovercourt

9.27 The 2019 Economic Strategy for Tendring identifies an opportunity for Harwich to become a strong port servicing the needs of the Clean Energy sector. Whilst potentially isolated, Harwich benefits from strong access to the A120, which in turn opens up the potential of easy access to the whole of Tendring District.

Tendring Economic Strategy (2019): Vision for Harwich and Dovercourt - *Using marine heritage and skills to drive Energy and Tourism sectors*

Although Harwich has the assets needed for it to develop a significant cluster of activity around the Clean Energy sector (and specifically Offshore Wind), this has not gained traction as per the aspirations set out in the 2013 strategy. Whilst Clean Energy and Marine Activities remain the more likely routes to greater innovation and growth in Harwich, it is important that partners and businesses remain agile to new opportunities and developments. This includes not only the offshore opportunity, but the construction and supply chain opportunities which could come from the development of Sizewell C and Bradwell B Nuclear Power stations. The Government's invitation to existing operators to submit proposals to expand existing operations at Greater Gabbard, Galloper, Gunfleet Sands, and the London Array wind farms also presents a strong opportunity for Harwich to support the development of this infrastructure.

Transfer of information on opportunity to and between businesses, will be critical. Establishing strong networks and supporting collaboration and innovation will help to achieve this. Proposals for the Harwich Innovation Centre, could also be revisited within the strategy period, potentially providing a focal point for this activity.

In addition to the Port related opportunity, Tendring District Council are already looking to deliver new high-quality public realm project in Dovercourt town centre. This will be an important milestone for the town, making it an attractive place for people to visit, capitalising upon a recent uplift in tourism locally. The 400-year anniversary of the Mayflower in 2020 will provide a more immediate opportunity to promote the town and capitalise upon new visitor markets.

9.28 The primary driver of Harwich's economy is Harwich International Port and as such it is recommended to protect the commercial site at Stanton Europark, as well as the Mercedes site, as the Port continues to operate. Whilst the Mercedes site is well accessed and largely flat, there are notable issues with regards to flood risk, potential contaminations and infrastructure works which should be considered moving forward. The Port-generated demand is unlikely to be fully accounted for in the demand scenarios, due to its specialised nature, and thus a level of flexibility in the employment provision in Harwich is recommended to account for this.

9.29 Stanton Europark is likely to see increased demand from retailers, with a number of well performing schemes in the local vicinity. Industrial demand here is low and Morrisons is performing as an anchor tenant, supporting the neighbouring larger retailers. Whilst the vacant site is not being actively promoted for B2/B8 use, there is potential for further retail capacity. However, it remains important that the remaining site is protected for B-class employment uses to service the local Harwich market.

Site	Area	Size (ha)	Protection	Potential for Development	Potential for Release	Recommendations
Employment Sites						
Stanton Europark	Harwich	3.3	✓	✓		Vacant areas appropriate for a mix of B-class uses, predominantly industrial and warehousing. Likely to be pressures for further retailing, rather than B-class uses. **Protect**
Mercedes Site	Harwich	3	✓	✓		Good access from A120. Opportunities to intensify development, subject to landowner aspirations. May also serve to support port activities. **Protect**
Land at Harwich Valley	Harwich	6.3	✓			High profile site with long frontage on A120. Good site for a mix of B-class employment uses, as part of wider mixed-used development. However, viability is a key issue - new road infrastructure required **Therefore, protect site as a medium-long term mixed-used opportunity.**
Existing Employment Areas						
SATO Site, Valley Rd	Harwich		✓	✓	✓	Part of the site (the existing SATO factory) to be redeveloped and released for housing. New SATO building should be protected to enable on-going employment uses. However, in long-term (probably beyond planning timeframe) all of the site is likely to be released for housing as the site is surrounded by housing. **Protect new factory site but release remaining site that is in excess to SATO needs.**
Durite Works, Valley Rd	Harwich				✓	Site has poor prominence and bound by residential uses. Beyond existing use, it is recommended that the site is released for development. **Site is not protected for employment**

Europa Way	Harwich		✓			Important employment site and well positioned for its current function. **Protect**

Frinton-on-Sea and Walton-on-the-Naze

9.30 Both locations very much support the local market with a number of limited and poor-quality industrial stock at Kirby Cross Industrial Estate and Harmer's Foundry. Occupancy levels are however strong, taking advantage of the local market, but there is an argument to be made regarding longevity should these tenants vacate.

9.31 The rural location of these areas dictate that interest will be generated almost entirely from the local market, with no predicted desire of inward investment. There is however no indication that levels of demand are likely to increase in even the short time.

9.32 It is not recommended that further employment allocations are provided in these settlements.

Tendring Economic Strategy (2019): Vision for Frinton-on-Sea and Walton-on-the-Naze

Frinton and Walton will be supported to be successful in providing a positive visitor experience. In Walton, objectives to regenerate the town centre could be reconsidered given that it is nine years since the publication of the Walton Regeneration Framework[8], 2010).

Site	Area	Size (ha)	Protection	Potential for Development	Potential for Release	Recommendations
Existing Employment Areas						
Kirby Cross Trading Estate	Kirby Cross		✓			Small industrial area serving a localised function (e.g. MOT services, car body repairs). Not expected that this site would have any higher function but should retain its current purpose. **Protect**
Harmer's Foundry	Walton-on-the-Naze				✓	This industrial estate is of poorly quality and is hampered by neighbouring uses and narrow access. **Site is not protected for employment**

8 http://www.tendringdc.gov.uk/sites/default/files/documents/business/regeneration/walton/Walton%20Regen%20F'work%20-%20Exec%20Summary%20Final%20(Low%20Res).pdf

Manningtree, Mistley & Lawford

9.33 Manningtree, Mistley and Lawford are strategically placed within Tendring in order to benefit from their local, rural market, as well as being close enough to Colchester and the A12 to take advantage of the town and its associated local road links.

Tendring Economic Strategy (2019): Vision for Manningtree, Mistley & Lawford

Partners should work to ensure that Manningtree continues to function as a pleasant and prosperous location with a strong service offer for its local community. More specifically, it is important to continue to monitor the performance of businesses on the Lawford Industrial Estate.

9.34 An important element of this area is the marine and other supplementary waterside locations, which play an important role within the local market. Otherwise commercial space is located primarily on the Lawford Industrial Estate, which comprises a number of smaller industrial schemes. Existing stock in this area is good, with only a few decrepit units and issues of circulation marking this an industrial estate which is otherwise performing strongly.

9.35 The area does continue to benefit from its increasingly affluent status however, with the imminent completion of 150 high-quality homes at Dale Hall providing adequate residential stock to supplement potential growth in the locality.

Site	Area	Size (ha)	Protection	Potential for Development	Potential for Release	Recommendations
Employment Sites						
Land South of Long Road	Mistley	2			✓	Poor access and employment uses would be remote from similar uses elsewhere in Manningtree/Mistley. There is also concern over site viability as road access and servicing are required. **Potential for release**
Existing Employment Areas						
Lawford Dale Industrial Estate	Manning tree		✓	✓		Established industrial area with a range of quality of premises. Potential for some refurbishment and redevelopment of older units, but employment uses should remain. **Protect**
EDME Maltings	Mistley	0.13	✓	✓	✓	Potential to redevelop this site with the relocation of EMDE. Appropriate employment likely to be small scale office use as part of a mixed-use development. While it would be preferred that an employment component is part of the redevelopment of the site, it is recognised that the focus of the scheme will not be B-class employment uses, with offices

						likely to only be an ancillary use on the site. **Protect a part of the site for employment as part of a mixed-use development on the site. Release remainder of the site for non-B-class uses.**
Crisp Maltings	Mistley		✓			Current single use occupier, likely to continue for foreseeable future. Appropriate to retain for employment. **Protect**
Mistley Marine	Mistley		✓			Key marine industry site next to Mistley Port. While opportunities for growth are likely to be limited, on-going marine maintenance, slipway and storage uses are important functions that should be protected. Future functions should continue to be marine related, though should not impact on the neighbouring Mistley Port. **Protect for marine industry**
Mistley Port	Mistley		✓			Operational port that includes bulk handling. Important links to local maltings plant. It is key for the local economy that current functions continue. Expansion opportunities are likely to be contained within the current footprint. **Protect for port and marine industry**

Brightlingsea

9.36 As with the previous Employment Land Review, we are of the view that market demand and spatial constraints make future diversification and investment in the area unlikely. The area is supported almost entirely by a number of low quality, port-related units.

Tendring Economic Strategy (2019): Vision for Brightlingsea

Brightlingsea should also be supported to maintain its position as a small but successful local centre. The opportunities to reinforce the town's reputation as a leisure port should also be monitored and recent growth within the tourism sector suggests this is performing well. A recent masterplan produced by the Brightlingsea Harbour Commission (BHC) in 2014 has developed long-term aspirations around Oliver's Wharf which would further help to secure long-term tourism income for the area.

9.37 Morses Lane Industrial Estate is a small, good quality industrial estate which serves a local market with a high occupancy level. As noted with the previous Employment Land Review, the estate is worth retaining, with the inherent ability to expand the site to the north and east.

9.38 Employment land is primarily restricted to Brightlingsea Shipyard, which sits adjacent to Brightlingsea Creek, leading into the River Colne. This is a large estate with a number of historic and poor quality industrial buildings, some showing advanced stages of dereliction. A number of these units would require redevelopment, along with the currently restricted general access which is through residential streets. Its marine industry function ought to be protected, although the long-term viability of the Shipyard is likely to require the refurbishment of units.

9.39 No further employment site allocations are recommended for Brightlingsea.

Site	Area	Size (ha)	Protection	Potential for Development	Potential for Release	Recommendations
Existing Employment Areas						
Morses Ln Industrial Estate	Brightlingsea					Good quality and well-functioning industrial area, appropriate for an on-going employment use. **Protect**
Shipyard Estate	Brightlingsea		✓	✓		Large shipyard estate, with an important marine industry function. Important to protect water access and marine uses. Some buildings are in need of refurbishment and this should be encouraged, although core marine functions should be retained and enhanced. **Protect for marine industry**

Rural Sites

9.40 Tendring also benefits from a number of rural sites in locations including Ardleigh, Great Bentley, Elmstead Market and Weeley. While rural in nature, these locations are primarily connected by the major road network on the A120 and A133 and offer both office and industrial accommodation to supplement the supply in the larger towns.

Tendring Economic Strategy (2019): Vision for Rural Tendring

Whilst the rural part of the district is an important business and employment location, it is not envisaged that there will be significant economic growth here over the next five years. Maintaining a dialogue with agricultural businesses will ensure that they are connected to the best sector and business support available and are able to navigate the opportunities and challenges associated with the UK's departure from the European Union. More generally, it will be important to ensure that rural residents are not prevented from accessing economic opportunities because of poor physical and digital connectivity.

9.41 Most notably, Elmstead Market benefits from Lanswood Park, a modern, mixed-use development in Tendring, which continues to develop B1(a) and hybrid industrial space on the A133 route into the east of Colchester. Occupancy levels are high, and the scheme is the only Grade-A accommodation in Tendring District.

9.42 Elsewhere existing employment areas generally comprise of lower quality, mixed-use schemes including Plough Road Business Centre in Great Bentley and Crown Business Centre in Ardleigh. Again, vacancy levels are generally tight in these areas. As has been mentioned, these local sites play a strong role in the local property market and will most likely continue to, subject to future redevelopment. Further sites, not currently allocated or with planning consents, are not considered warranted due to the overall demand and supply balance in Tendring.

Site	Area	Size (ha)	Protection	Potential for Development	Potential for Release	Recommendations
Employment Sites						
South of Thorpe Road	Weeley	1	✓			Employment allocation in Emerging Local Plan as part of a mixed-use scheme. Local developer interest for small scale B1 office suite development. **Likely to be only a limited market in this location, however suitable to retain for employment. Protect.**
Lanswood Park	Elmstead	1.2	✓			Would provide further employment premises, similar to existing uses at Lanswood Park. Potential for low impact, light industry workshops or hybrid office/industrial spaces to broaden uses. Requires infrastructure investment to bring forward. **Protect.**
Extension to Plough Road Business Centre	Great Bentley	1.0	✓			This will be extension to existing employment industrial estate. However, phasing plan for mixed-use development shows employment as final phase of development. **Important to protect this and ensure employment comes forward. Protect.**
Crown Business Centre, Old Ipswich Road	Ardleigh	2.31	✓			Prominent site near junction of A12 and A120. Scheme does not yet have planning permission but is already being marketed as Hudson Park. Current planning application is heavily reliant on small B1 units (25-30 sqm) and broader mix may be appropriate in this location. **Protect but reconsider mix.**
Land south west of Horsley Cross	Horsley Cross	11.2	✓			Strategic but somewhat isolated site with detailed approval for a new industrial park. Site has good access and prominence to A120. **Protect in accordance with approval.**
Land north of	Weeley	2.8			✓	Good location/prominence to A133 and B1033, presenting a

Colchester Rd						long-term opportunity. Likely only one site needed in Weeley, with land south of Colchester Rd having connection to Premier Inn and roadside services. Therefore, first preference for Weeley would be the southern site. **Not protected for employment.**
Land south of Colchester Road	Weeley	U/K	✓			Good location/prominence to A133 and B1033. Long term opportunity, with Landowner now pursuing residential development on part of site. Potential to connect with Premier Inn and roadside services as a mixed-use hub. **Protect.**
Land south of Manheim Auctions and TBS	Frating	23.0			✓	Reasonable site for expansion of employment uses. Site does not have employment allocation or planning status. Insufficient demand for an additional site over and above current allocations and approved sites. **Not protected for employment.**
Lifehouse Spa	Thorpe le Soken	U/K			✓	No current potential for employment development. Rural location with no prominence. **Not protected for employment.**
A120 west of Little Bentley	Little Bentley	2.2			✓	Reasonable location for employment, such as roadside uses, although limited local population would limit market for site. Not considered to be sufficient demand for employment at this location. **Not protected for employment.**
Existing Employment Areas						
Old Ipswich Rd	Ardleigh		✓			Small industrial and office area serving a localised function. Some capacity for more intensification of uses on site, though not considered to require further land outside current areas. **Protect**
Lanswood Park	Elmstead Market		✓			Modern office park, currently expanding. Appropriate for employment **Protect**
Plough Road Centre	Great Bentley		✓			Reasonable quality business centre with industrial and office units. Appropriate for on-going function **Protect**

Martell's Pit Industrial Estate	Ardleigh		✓	✓		Industrial estate surrounded by quarry and scrapyard uses. Small and of basic quality but well occupied. Refurbishment and renewal of stock should be encouraged, though maintaining employment function. **Protect**
Rice Bridge Industrial Estate	Thorpe-le-Soken		✓	✓		Small industrial estate of basic quality. Refurbishment and renewal of stock should be encouraged, though maintaining employment function. **Protect**
Frating Site	Frating		✓			Important distribution node. Potential to link with New Garden Village Masterplan and consideration of this node should form part of masterplanning process. Retain as an employment use **Protect**

Review of Employment Policies

9.43 **Policy SP4** of the Draft Tendring District Local Plan sets out how Tendring DC will provide for employment and retail. This identified a requirement for between 20ha and 38ha of employment land. Following an Examination in Public, the requirement for employment land has been reduced to between 12ha and 20ha.

9.44 Our own assessment suggests that the net additional requirement is closer to -0.87 ha and 2.77 ha. However, a figure closer to the 12-20ha figure would provide for a range of sites and choice.

9.45 **Policy PP6** of the Draft Tendring District Local Plan sets out how the Council will protect existing employment sites. It sets out the instances when proposals for non-employment uses will be considered acceptable. The council may wish to consider the following changes:

- Alternative uses should respond to a demonstrable need
- Consider incorporating a time period over which the site should demonstrate that it has been marketed such as 1-2 years

9.46 **Policy PP7** of the Draft Tendring District Local Plan identifies a number of employment allocations which can support future employment growth. These are summarised below along with our recommendations on which sites should be protected. This suggests that there is potential for between 13.33 and 15.33 ha of land to support future employment growth.

Name of Site	Local Plan allocation (ha)	Potential growth beyond 2033	Our Recommendation
Land West of Carless Refinery, Parkeston	4.5 ha	0ha	Site should be excluded. The site is likely to be required as an extension to the refinery and will not be available to the open market for B class uses.
Stanton Europark, Parkeston	2-4 ha	0 ha	It is recommended that this site is protected
Tendring Colchester Borders Garden Community	6 ha	4 – 24 ha	This site may be appropriate but due to the early stage of the proposals, the quantum has not been assessed.
Mercedes Site, Harwich	3 ha	4.4 ha	It is recommended that this site is protected
South of Thorpe Road, Weeley	1 ha	0 ha	It is recommended that this site is protected
Land South of Long Road, Mistley	2 ha	0 ha	There are a number of issues with this site and it is recommended that the site is considered for potential release.
EDME Maltings, Mistley	0.13 ha	9 ha	It is recommended that part of the site is protected.
Lanswood Park, Elmstead Market	1.2 ha	0 ha	It is recommended that this site is protected
Total	**19.83 - 21.8 ha**	**8.4 – 28.4 ha**	
Total to be protected	**13.33 - 15.33 ha**	**8.4 – 28.4 ha**	N.B. this includes Tendring Colchester Borders even though exact quantum is unknown

Strategic Development Allocations

9.47 Four Strategic Development Allocations have been identified in Tendring, being:

- Oakwood Park
- Hartley Gardens
- Tendring Colchester Borders Garden Community
- Tendring Central Garden Village

9.48 These developments will be mixed use, including space for B-class employment uses (with 43,000 new jobs created across three sites). This will ensure that there is a range of employment opportunities in close proximity to the growing populations of these communities.

9.49 Full masterplanning of these communities is required to understand the scale of employment uses that would be warranted in them. With regards to B-class employment, the masterplans should include the following principles:

- Employment should be provided in high profile locations, with excellent access.
- Employment land provision should reflect the demand profile of the Tendring economy in terms of size and mix.
- The provision of employment land should take into consideration the already high supply of employment land in Tendring, with wider options available across the district. Therefore, the provision of employment land in the Strategic Development Allocations does not need to provide employment for all of their residential populations.

Appendix A - Site Scoring System for Employment Allocations

Table A.1 Site Scoring for Employment Allocations

Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to A120 – score 8 • Site adjacent and with direct access to A133 – score 7 • 0.5 km from A120 or A133 – score 6/5 • Site 1.0 km from A120 or A133 – score 4 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary routes A120 or A133 junction scores zero
	Prominence	• Site adjacent to, and visible from motorway junction – score 10/9 • Site adjacent to, and visible from local A road – score 8/7 • Site adjacent to, and visible from a major B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Planning Status		• If site has detailed/full planning status – score 10 • If site has outline planning status – score 8 • If site allocated in the development plan – score 4 • If site is available, subject to planning – score 1
Site Conditions	Services Availability	• If all services are provided and in place – score 10 • If priority services are available with no abnormal costs – score 7 • If all priority services are available, but with abnormal costs – score 3 • Some services are unavailable – score 0
	Constraints	May be physical (including access). planning, or legal Reduce score by 2 for each constraint If there are none – score 10
	Environmental Setting	Subjective, score 0 to 10, examples: • Good quality business park/greenfield location – score 10 • Moderate quality industrial estate – score 5 • Poor quality industrial estate/in-fill location – score 2
	Flexibility	Subjective, score 0 to 10: Score site in terms of site shape and ability to sub-divide to suit smaller occupiers

		Consider the site within its context/category. Score 10 if it is flexible, 0 if it is inflexible.
Site Availability		• Site available to develop within 0-1 year – score 10 • Site available to develop within 1-3 years – score 6 • Site available to develop 3-5 years – score 3 • Site available to develop 5+ years – score 0

Appendix B - Site Scoring Results – Employment Allocations

Site Name	Size (ha)	Likely Use Type	Site Location and Access				Planning Status	Site Conditions				Site Availability	Total (Max 100)
			Proximity to Strategic Highway Network	Prominence	Public Transport	Sequential Test		Services Availability	Constraints	Environmental Setting	Flexibility		
ALLOCATED SITES													
Carless Refinery, Parkeston	4.5	B2	4	4	10	10	4	10	6	6	3	6	**63**
Stanton Europark, Parkeston	3.3	A1, B1(c)	8	8	10	10	4	10	6	8	7	10	**81**
Tendring Colchester Borders Garden Community	6	B1(a, c)	8	8	5	3	4	0	10	8	9	0	**55**
Mercedes Site, Harwich	3	B2	8	8	10	7	4	10	4	6	6	6	**69**
South of Thorpe Road, Weeley	1	B1(a)	3	5	10	7	4	7	10	8	8	6	**68**
Land South of Long Road, Mistley	2	B1(c)	0	6	10	7	8	0	8	8	8	6	**61**
EDME Maltings, Mistley	0.13	B1(a)	0	6	10	7	4	10	8	8	5	3	**61**
Lanswood Park, Elmstead	1.2	B1(a, c)	7	8	5	3	4	10	8	10	8	10	**73**
POTENTIAL SITES - WITH PLANNING													
Land at Brook Park West, Clacton	1.3	B1	7	8	0	7	8	10	10	9	8	6	**73**
Oakwood Park Strategic Development Allocation	1	B1	2	6	5	7	8	7	10	10	9	6	**70**
Extension to Plough Road Business Centre, Great Bentley	1	B1	2	2	10	7	8	7	8	8	9	6	**67**
Extension to Gorse Lane Indsutrial Estate, Clacton	6.8	B2	2	4	5	7	8	7	8	8	9	6	**64**
Land at Dale Hall, Cox's Hill, Lawford	0.2	B1	0	3	10	10	8	7	8	6	5	6	**63**
Land South West of Horsley Cross	11.2	B2, B8	8	8	0	3	10	0	10	9	9	6	**63**
Land at Harwich Valley, Pond Hall Farm, Dovercourt	6.3	B1, B2, B8	3	8	5	7	8	0	6	7	7	6	**57**
POTENTIAL SITES - NO PLANNING													
Land North of Colchester Road, Weeley	2.8	B1	7	8	10	7	1	0	8	8	8	3	**60**
Lifehouse Spa, Thorpe-le-Soken	u/k	B1	0	2	10	7	1	7	6	7	6	6	**52**
Land North of Brook Park West, Clacton	12	B1, B2, B8	7	8	0	7	1	7	10	9	7	3	**59**
Hartley Gardens Strategic Development Allocation	7	B1, B2	7	8	0	7	4	7	4	9	7	0	**53**
Land South of Manheim Auctions, Frating	23	B1, B2, B8	7	8	5	3	1	0	10	9	7	0	**50**
Crown Business Centre, Old Ipswich Road, Ardleigh	2.31	B1, B8	4	7	0	3	1	7	6	6	8	6	**48**
Cliphedge Farm, Harwich Road, Little Bentley	1.3	B1	6	2	0	3	1	0	8	9	8	6	**43**
A120, West of Little Bentley	2.2	B1	8	8	0	3	1	0	8	8	4	0	**40**
SITES NOT ASSESSED													
Tendring Colchester Borders Garden Community	u/k	B1, B2											
Land South of Colchester Road, Weeley	u/k	B1											
Tendring Central Garden Village Concept, Frating	u/k	B1, B2											

Appendix C - Site Scoring System for Existing Employment Areas

Table C.1 Site Scoring System for Existing Employment Areas

Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to A120 – score 8 • Site adjacent and with direct access to A133 – score 7 • 0.5 km from A120 or A133 – score 6/5 • Site 1.0 km from A120 or A133 – score 4 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary routes A120 or A133 junction scores zero.
	Prominence	• Site adjacent to, and visible from motorway junction – score 10/9 • Site adjacent to, and visible from local A road – score 8/7 • Site adjacent to, and visible from a major B road – score 6/5 • Site has local prominence, e.g. within its industrial location – score 4/3 • Site located in 'backlands' – score 2/1/0
	Public Transport	• Site close to bus route (within 0.5 km) and near to rail station (within 2 km) – score 10 • Site within 0.5 km of a bus route – score 5 • Limited public transport – score 0
	Sequential test	• Within urban area – score 10 • Urban fringe (close to settlement development boundary) – score 7 • Rural location (away from settlement development boundary) – score 3
Site Conditions	Ability to Expand	• Large choice of several sites available for growth – score 10 • Some choice of sites available – score 7 • Limited choice of sites available – score 5 • Potential to expand to neighbouring sites, though no planning in place – score 3 • Estate is at capacity and no neighbouring options available – score 0
	Access and Congestion	• Subjective, score 0 to 10, considering: • Sufficiency of car-parking • Congestion of internal roads • Entry to site • Appropriateness and capacity of roads leading to site • Turning capacity for heavy vehicles
	Interface with Neighbouring Sites	• No neighbouring uses that would limit activities on site – score 10 • Some potentially sensitive neighbouring uses but sufficient screening in place – score 7 • Neighbouring uses are moderately impacted by site uses, mitigated by basic screening – score 5 • Site is within a residential area and accessed through residential streets – score 0-2
	Building Quality and Condition	• High quality, modern premises in excellent state of repair – score 10 • Modern premises in good condition – score 8/9

		• 1990's build in good or reasonable state of repair – score 6/7 • Older stock in moderate state, requiring some upkeep – score 4/5 • Dilapidated buildings, in need of refurbishment, not fit for purpose – score 0-3
	Site Amenity	Subjective, score 0 to 10, considering: • Landscaping • Site layout • On-site services
Site Location and Access	Proximity to strategic highway network	• Site adjacent to motorway junction – score 10 • Site adjacent and with direct access to A120 – score 8 • Site adjacent and with direct access to A133 – score 7 • 0.5 km from A120 or A133 – score 6/5 • Site 1.0 km from A120 or A133 – score 4 • For each further half km distance from junction, reduce score by one point, i.e. any site 5.0 km or further from primary routes A120 or A133 junction scores zero.

REGENERIS

Appendix D - Site Scoring Results – Existing Employment Areas

Site Name	Size (ha)	Type	Site Location and Access				Site Conditions					Total (Max 90)
			Strategic Road Proximity	Prominence	Public Transport	Sequential Test	Ability to Expand	Access and Congestion	Interface with Neighbouring Sites	Building Quality and Condition	Site Amenity	
Ford Road (Newman) Industrial Estate, Clacton	2.1	Small industrial estate	3	3	10	10	3	4	2	5	3	**43**
Oakwood and Crusader Business Park, Clacton	*38.07	large industrial estate and business park	2	6	5	7	7	7	7	7	7	**55**
Gorse Lane Industrial Estate, Clacton	38.07	large industrial estate and business park	2	5	5	7	7	7	7	8	6	**54**
Valleybridge Road Industrial Estate, Clacton	44.2	Small industrial estate and business park	4	6	10	10	0	6	5	5	5	**51**
Oxford Road Industrial Estate, Clacton	9.61	Trade counter, small office and industrial warehouses	7	7	10	10	0	3	2	5	2	**46**
Sadds Yard, Clacton	7.6	Small industrial estate	6	7	10	10	0	2	2	3	2	**42**
SATO Site, Valley Road, Harwich	2.2	Single occupier industrial site	3	5	5	7	0	4	1	5	3	**33**
Durite Works, Valley Road, Harwich	1	Single occupier industrial site	3	5	5	7	0	4	1	5	3	**33**
Europa Way, Harwich	4.38	Industrial estate	8	8	10	10	7	9	7	7	7	**73**
Mercedes Site, Bathside Bay	2.77	Industrial estate	8	8	10	7	5	8	10	5	5	**66**
Kirby Cross Trading Estate, Kirby Cross	1	Small industrial estate	0	6	10	7	5	5	5	5	5	**48**
Harmer's Foundry, Walton on the Naze	1.12	Small industrial estate with some offices	0	1	5	3	3	2	1	4	1	**20**
Lawford Dale Industrial Estate, Manningtree	18.77	large industrial estate and business park	0	8	10	7	0	6	7	7	7	**52**
EDME Maltings, Mistley	1.5	Single occupier industrial site	0	6	10	7	0	6	5	6	5	**45**
Crisp Maltings, Mistley	1.5	Single occupier industrial site	0	4	10	7	3	5	5	6	5	**45**
Mistley Marine, Mistley	0.9	Small industrial estate	0	4	10	7	3	4	5	4	4	**41**
Mistley Port, Mistley	3.1	Small industrial estate	0	5	10	7	0	4	5	4	4	**39**
Morses Lane Industrial Estate, Brightlingsea	3.4	Small industrial estate	0	4	0	7	3	7	5	6	6	**38**
Shipyard Estate, Brightlingsea	1.74	Small industrial estate	0	3	0	7	3	2	5	3	3	**26**
Old Ipswich Road, Ardleigh	N/a	Small industrial estate	5	7	0	3	5	7	7	6	6	**46**
Landswood Park, Elmstead Market	2.2	Modern office park	7	8	5	3	7	9	10	10	10	**69**
Plough Road Centre, Great Bentley	2	Small industrial estate with some office buildings	2	2	10	7	5	6	5	7	7	**51**
Martell's Pit Industrial Estate, Ardleigh	8.03	Small industrial estate	1	2	0	3	3	2	10	4	2	**27**
Rice Bridge Industrial Estate, Thorpe le Soken	1.47	Small industrial estate with mix of industrial and office	1	6	10	3	3	5	10	5	5	**48**
Frating	273	Large scale distribution and smaller industrial premises	7	8	5	3	7	7	10	8	7	**62**

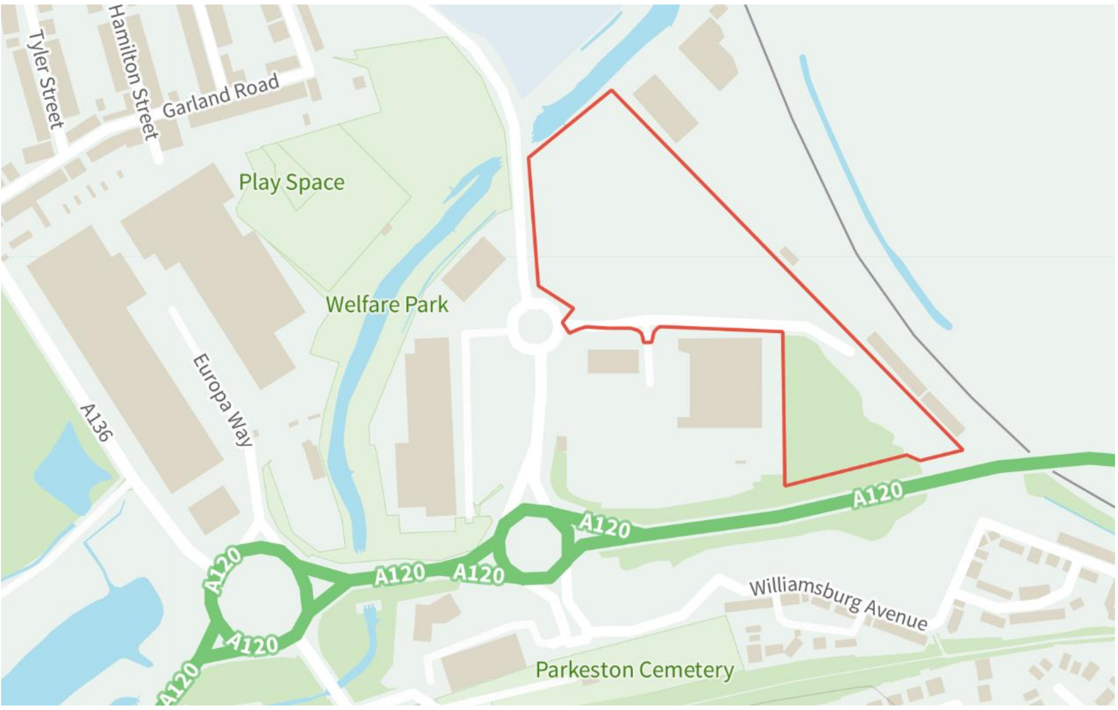
Appendix E - Allocated Sites Proformas

Table E.1 Land West of Carless Refinery, Parkeston

Site Name	Land West of Carless Refinery, Parkeston
Policy Reference	SAE1
Owner	Multiple
Agent	N/a
Size, ha	4.5
Market Availability	Not available – committed for refinery purposes
Planning Status (Allocated Uses)	Employment allocation in Emerging Local Plan. SAE1 identifies site as extension to existing refinery. No current planning application.
Proposal	Extension to existing refinery – onto undeveloped land to the west which lies immediately south of the railway line and east of the Sewage Treatment Works.
Constraints	Partially treed, though mostly cleared Development restricted to extension given health and safety requirements relating to the operation of the refinery
Comments	Mostly flat site, alongside railway corridor. Removed from sensitive uses.
Likely development potential	Appropriate for its intended use as an extension to existing refinery. Not likely to be developed for typical B-class employment buildings.

Serviced	No

Table E.2 Stanton Europark

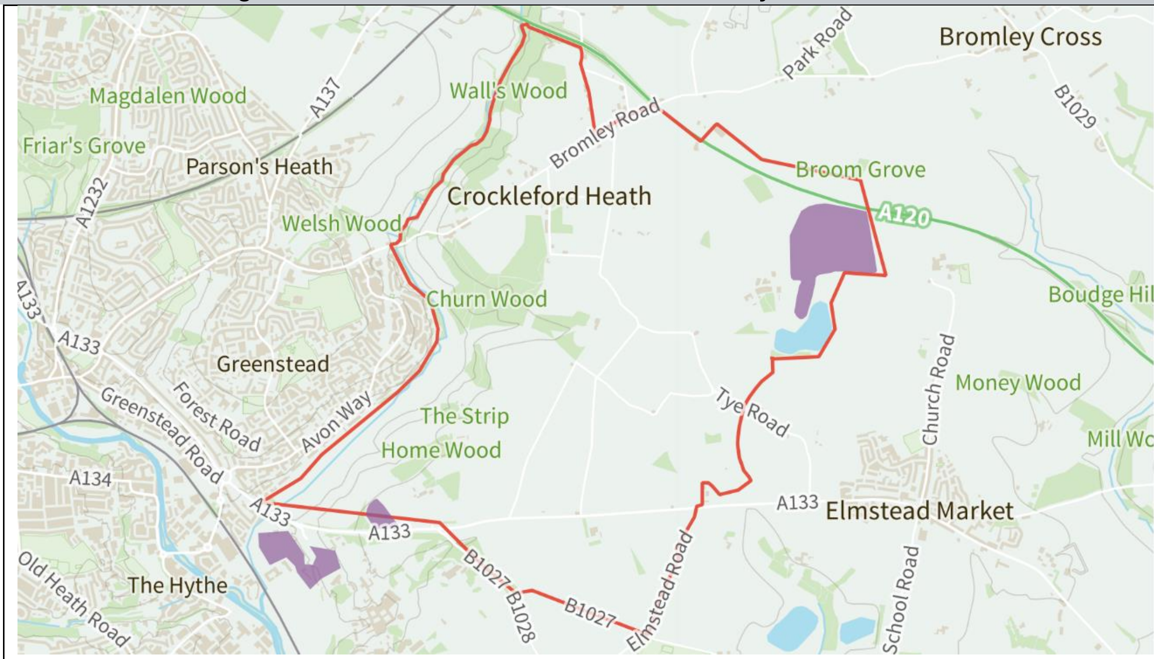


Site Name	Stanton Europark
Policy Reference	SAE7
Owner	Orion Land and Leisure
Agent	JLL
Size, ha	3.3 (2-4 in Local Plan)
Market Availability	Marketed by JLL
Planning Status (Allocated Uses)	Employment allocation in Emerging Local Plan, for 2-4 ha B2/B8 along with retail and leisure. Lapsed planning consent for mixed B-class uses.
Proposal	A1, D2, B2/B8
Constraints	Sewage pipe crosses site Sits within flood zone
Comments	Full site includes existing retail park uses. Vacant areas are flat and with good access. Close to port uses.
Likely development potential	Vacant areas appropriate for a mix of B-class, predominantly industrial and warehousing. Likely to be pressures for further retailing, rather than B-class uses. Recommended to protect for B-class uses.

HATCH REGENERIS

Serviced	Yes (Part)

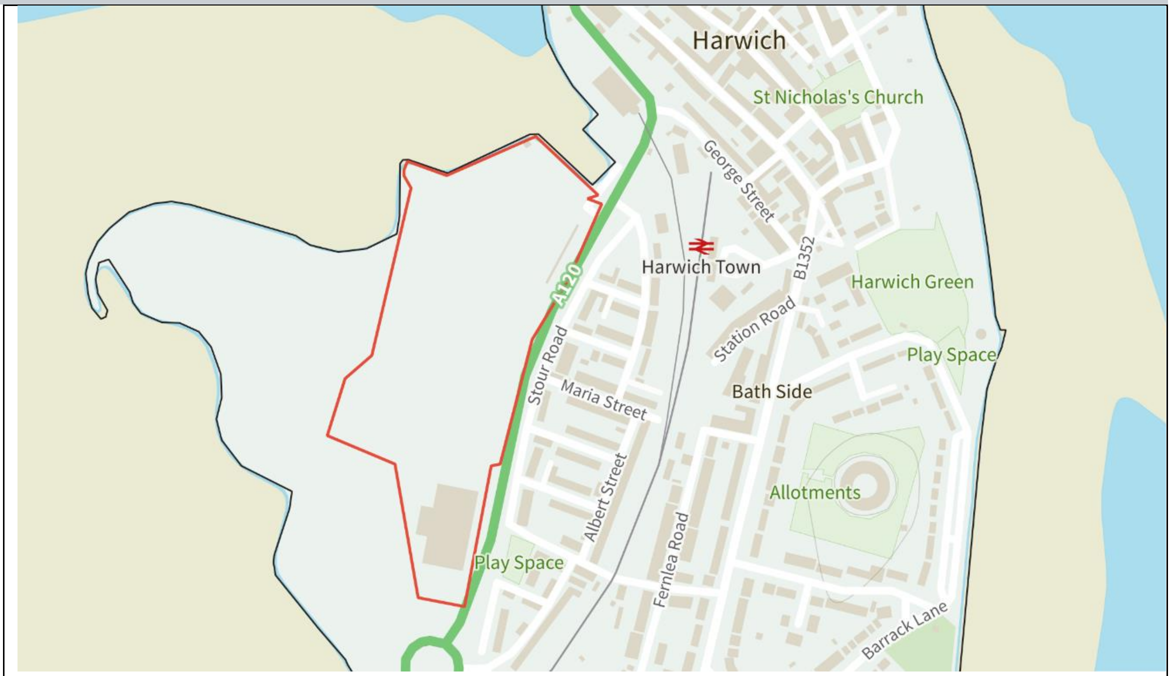
Table E.3 Tendring Colchester Borders Garden Community



Site Name	Tendring Colchester Borders Garden Community
Policy Reference	SP8
Owner	Multiple (controlled by two parties)
Agent	North Essex Garden Communities
Size, ha	700 approx (of which 6.0 are indicated for employment use in the Tendring Local Plan).
Market Availability	Not available
Planning Status (Allocated Uses)	Broad location for 7,000-9,000 home Garden Community in Emerging Local Plan crossing the Tendring/Colchester administrative boundary. It is envisaged that 2,500 homes (split 50:50 between Tendring and Colchester) will be built up to 2033 and the Tendring Local Plan envisages 6ha of employment land will be delivered.
Proposal	Broad area identified in Emerging Local Plan for 1,250 dwellings and employment uses.
Constraints	Requires significant further investigations to determine landholdings and develop masterplans.
Comments	N/a
Likely development potential	Appropriate to incorporate an employment element. Employment land should have high visibility and access to A120 and/or A133. Would need to ensure that residential developments do not preclude development of employment uses.

Serviced	No

Mercedes Site, Harwich



Site Name	Mercedes Site, Harwich
Policy Reference	SAE4
Owner	Harwich International Port Ltd
Agent	N/a
Size, ha	3.0
Market Availability	Not available
Planning Status (Allocated Uses)	Employment allocation in Emerging Local Plan. Planning permission has already been granted for open air storage and distribution, an office, welfare facilities in the form of porta cabins the installation of perimeter and lighting towers on the site. The Mercedes site is included within the larger boundary of the proposed Bathside Bay development. The wider Bathside Bay project has secured planning permission which is subject to a condition that development must be commenced before 2021 (10/0202/FUL).
Proposal	Emerging Local Plan states that site has potential for intensification of current uses, including potential for open storage and warehouses (5,000 sqm).
Constraints	Sits within flood zone Known ground stability issues Potentially contaminated land
Comments	Access into the site is from the north east boundary via the A120. Much of the site is used for storage and

	therefore offers room for intensification of the existing proximal port facilities. Flat site, which is currently majority let to Grange fencing on a ten year lease. Some open storage. Appropriate for storage and warehousing to support the port uses.
Likely development potential	Existing employment site should be protected.
Serviced	Yes

Table E.4 South of Thorpe Road, Weeley

Site Name	South of Thorpe Road, Weeley
Policy Reference	SAMU5
Owner	Rose Builders (Properties) Ltd
Agent	N/a
Size, ha	1.0
Market Availability	Not available
Planning Status (Allocated Uses)	Mixed-use development allocation in Emerging Local Plan including 280 dwellings, 1ha of employment land, open space and primary school. Planning application refused by the Council in 2018 and an appeal has been lodged. A new application has been submitted to the Council and is expected to be determined in 2019.
Proposal	Outline planning currently under consideration, including up to 3,000 of B1 offices. Rose Builders looking to bring employment site forward in the period 2020-25 and report no physical constraints. They would look to develop small office suites.
Constraints	N/a
Comments	N/a
Likely development potential	Appropriate for intended B1 office suites of a small scale, although likely to be only a limited market in this location, as established by the developer themselves.
Serviced	No

Table E.5 Land South of Long Road, Mistley

Site Name	Land South of Long Road, Mistley
Policy Reference	SAE2
Owner	City & Country
Agent	Strutt & Parker
Size, ha	2.0
Market Availability	Informally marketing through Strutt & Parker
Planning Status (Allocated Uses)	Employment allocation in Emerging Local Plan. Outline permission for 2 ha of employment land and 300 dwellings.
Proposal	"Current application to increase dwellings to 485 (and to retain employment land) refused by the Council but is the subject of an appeal to be determined in 2019.
Constraints	Poor access via country roads (including south-east corner of site, where intended employment uses would be located) – this would require upgrade to Clacton Rd/Dead Ln intersection and access points.
Comments	Flat, vacant land. Landholder reports to significant constraints and that they would not build employment uses speculatively. Currently informally marketing the site for employment, but no firm interest.
Likely development potential	Employment uses would be removed from similar uses elsewhere in Manningtree/Mistley. Development potential is for very small units – offices and workshops. 2ha of employment land is likely to be a long-term prospect. Question over viability and developability given existing narrow access
Serviced	No

Table E.6 EDME Maltings

Site Name	EDME Maltings
Policy Reference	SAMU1
Owner	EDME
Agent	N/a
Size, ha	0.13
Market Availability	Not currently available
Planning Status (Allocated Uses)	Mixed-use development allocation in Emerging Local Plan including 150 dwellings and at least 0.13 ha to be retained for employment. Local Plan states that this retained area should match current employment levels of full site. The Thorn Quay Warehouse site north of the High Street has been demolished and planning permission for a new building comprising 45 dwellings, quay level warehouse floorspace, office floorspace and car parking provision.
Proposal	Emerging Local Plan anticipates the redevelopment of this site, with the relocation of EDME. Redevelopment requires masterplanning which should identify and support employment for the site.
Constraints	Potentially restrictive access.
Comments	Site split over two plots – the smaller plot to the north of High Street fronting on to the River Stour and the larger plot to the south of High Street.
Likely development potential	Development potential is likely to be for small scale office units on site, as part of the mixed-use redevelopment.
Serviced	Yes

Table E.7 Lanswood Park, Elmstead

Site Name	Lanswood Park, Elmstead
Policy Reference	SAE3
Owner	Lanswood Ltd
Agent	N/a
Size, ha	1.2
Market Availability	Not available
Planning Status (Allocated Uses)	Employment allocation in Emerging Local Plan. Lanswood Park is an existing high quality, semi-rural commercial development situated to the south of the A133 between Elmstead Market and Frating. This land also has outline planning permission for three additional buildings.
Proposal	Phases 1 and 2 form a business centre offering commercial and office floorspace. The 3rd phase has been completed and let. Phases 4 and 5 remain to be developed. Given the on-going success of employment development at this site, it is proposed to extend the existing extent of employment land by way of a further allocation. The developers are currently discussing the potential to expand the business park by a further 2.5ha accommodating around 12,000 sqm additional commercial space.
Constraints	Requires infrastructure investment to open up further stages of Lanswood Park, notably increasing electricity capacity. This is an abnormal cost and yields realised from employment sites in Tendring may not be sufficient to bear this cost, potentially making further phases unviable.

Comments	N/a
Likely development potential	Roll-out of further employment stock, similar to existing uses at Lanswood Park. Potential for low impact, light industry workshops or hybrid office/industrial spaces to broaden uses.
Serviced	No

Appendix F - Maps for Other Potential Sites

Figure 9.1 Lanswood Park, Elmstead Market

Figure 9.2 Clip Hedge Farm, Little Bentley

Figure 9.3 Lifehouse, Thorpe-le-Soken

Figure 9.4 Land South of Manheim, Frating

Figure 9.5 Colchester Road, South Weeley

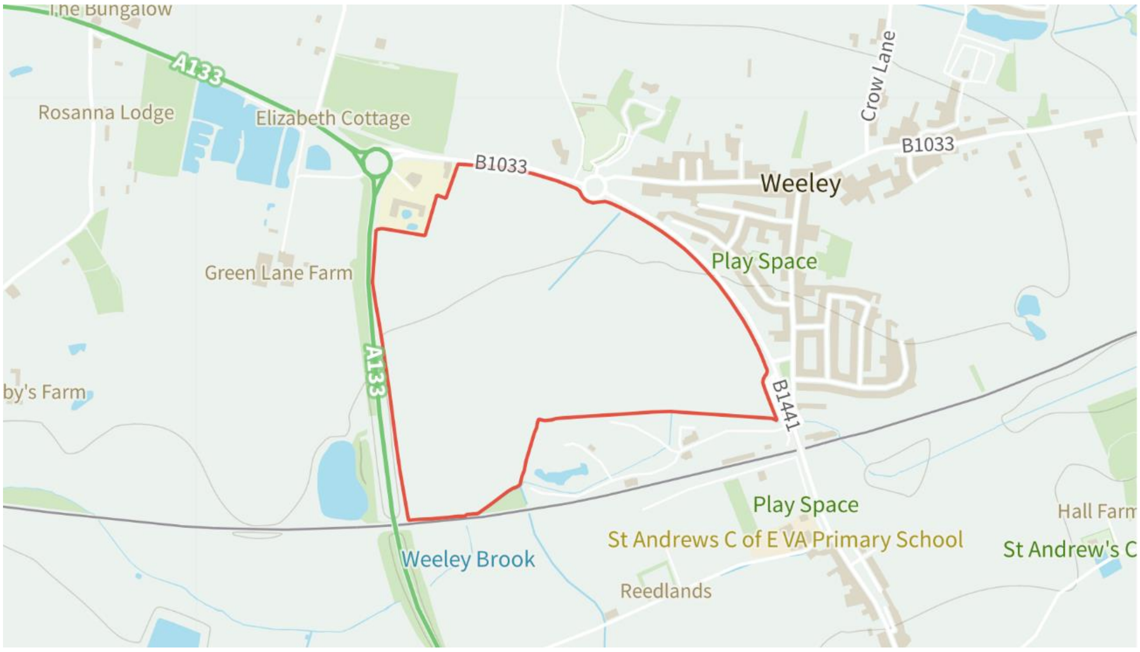


Figure 9.6 Tendring Central, Frating

HATCH REGENERIS

Figure 9.7 Oakwood Park, Clacton

Figure 9.8 Colchester Road, North Weeley (Employment Part Only)

Figure 9.9 Horsley Cross (Tendring Euro Park), Horsley Cross

Figure 9.10 Hartley Gardens, Clacton

Figure 9.11 Plough Road, Great Bentley

Figure 9.12 Crown Business Centre, Ardleigh

Figure 9.13 Harwich Valley, Harwich

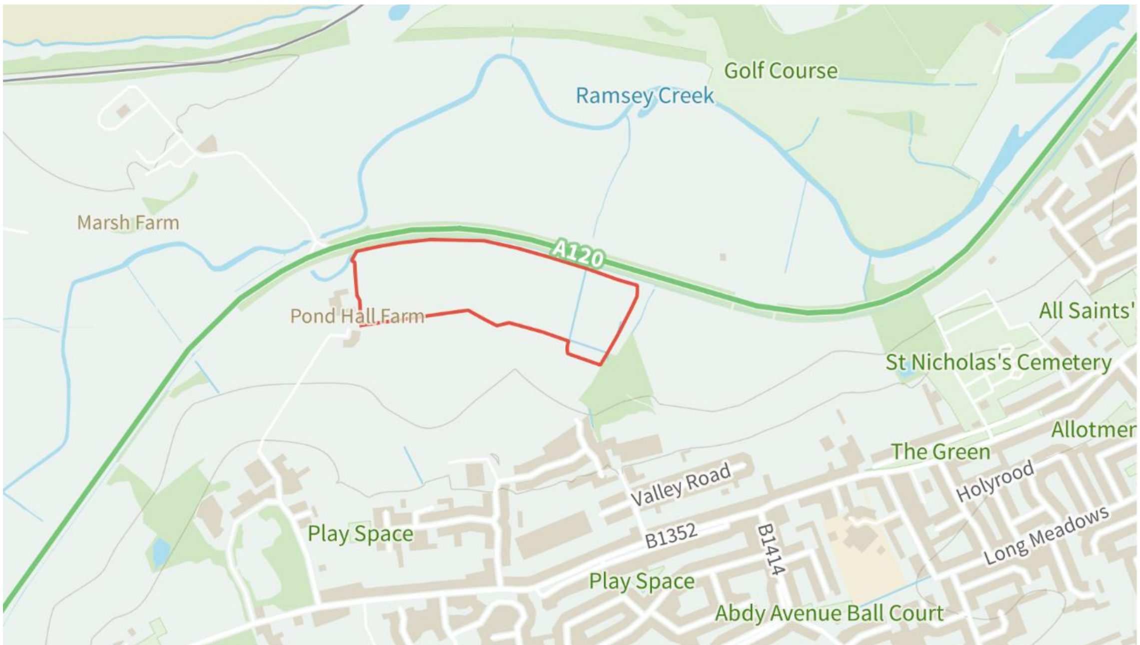


Figure 9.14 Dale Hall, Lawford

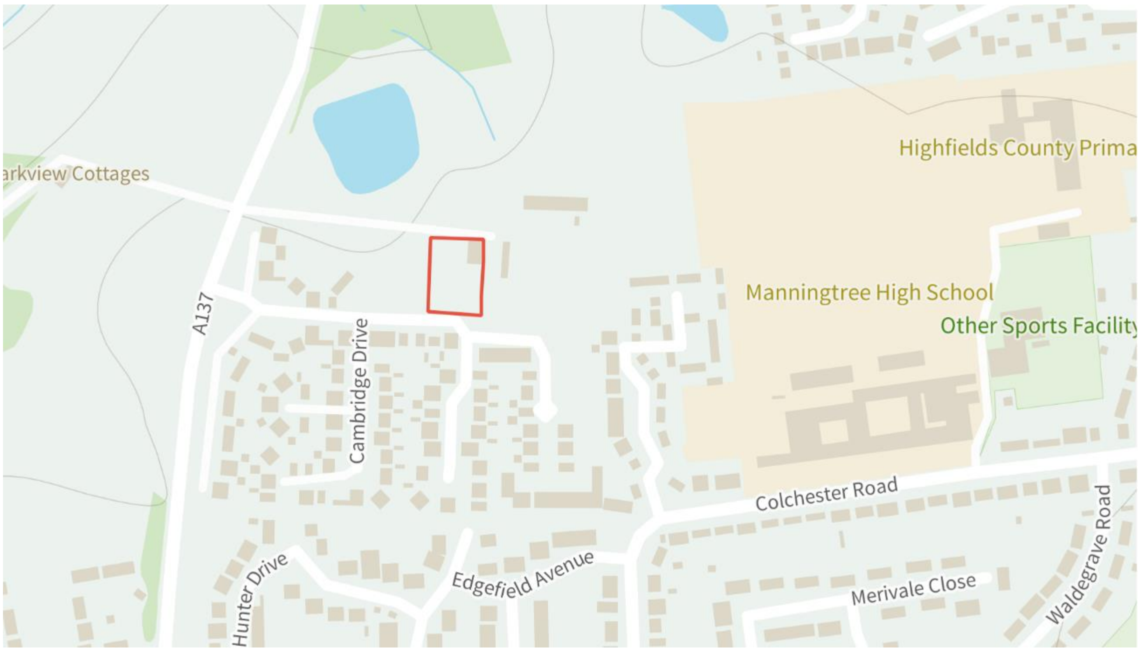


Figure 9.15 Brookpark, West Clacton

Figure 9.16 North of Brookpark, West Clacton

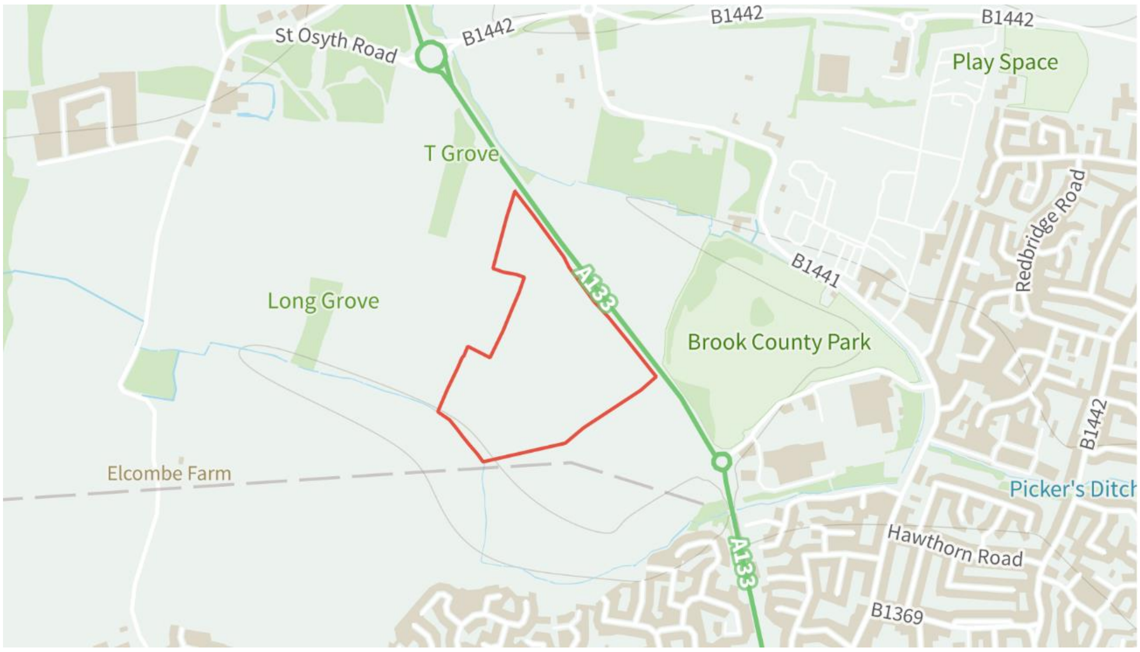


Figure 9.17 A120 West of Little Bentley

Figure 9.18 Telford Road Clacton

Source

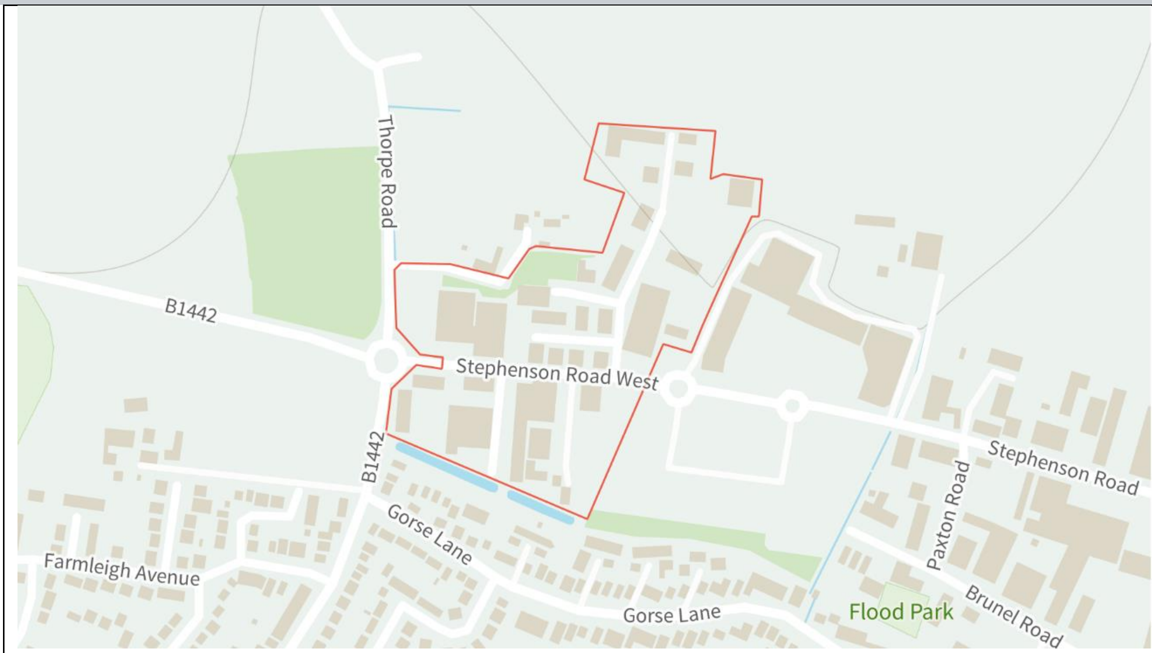
Appendix G - Employment Area Proformas

Table G.1 Ford Road (Newman) Industrial Estate, Clacton

Name	Ford Road (Newman) Industrial Estate, Clacton.
Description	Small industrial estate close to the Town Centre. Primarily older, lower quality light industrial units, some with some substantial yard space. High rate of occupation across the site.
Key Occupier(s)	R. Dillon Builder Contractors D E Simpsons MOT RTS Garage Dalau
Prominence	Bounded by high-density residential area, with allotments to the south
Current Use (Use Classes)	B1, B2
Size, ha	2.1
Building Age Range	40 years +
Average Building Quality	Generally low quality historic units

Constraints	Limited access via residential roads
Critical Mass	Established industrial site within an otherwise residential area. Primarily mechanical and car uses on site.
Opportunities for redevelopment/ expansion	Some units provided with good yard space which may see future development, however no further remaining land on site for expansion.
Score (Max 90) / Recommendations	43

Table G.2 Oakwood and Crusader Business Park, Clacton



Name	Oakwood and Crusader Business Park, Clacton.
Description	Large employment area comprised of Oakwood in the north (industrial) and Crusader in the south (office, industrial). Oakwood Park includes larger industrial units of average/good quality and high occupation rates. Crusader includes smaller industrial premises and office developments.
Key Occupier(s)	Bookers Wholesale Bentley Glass Crusader Holidays
Prominence	Strong prominence with good access off Thorpe Rd/B1442 roundabout
Current Use (Use Classes)	B1(a), B1(c), B2, B8

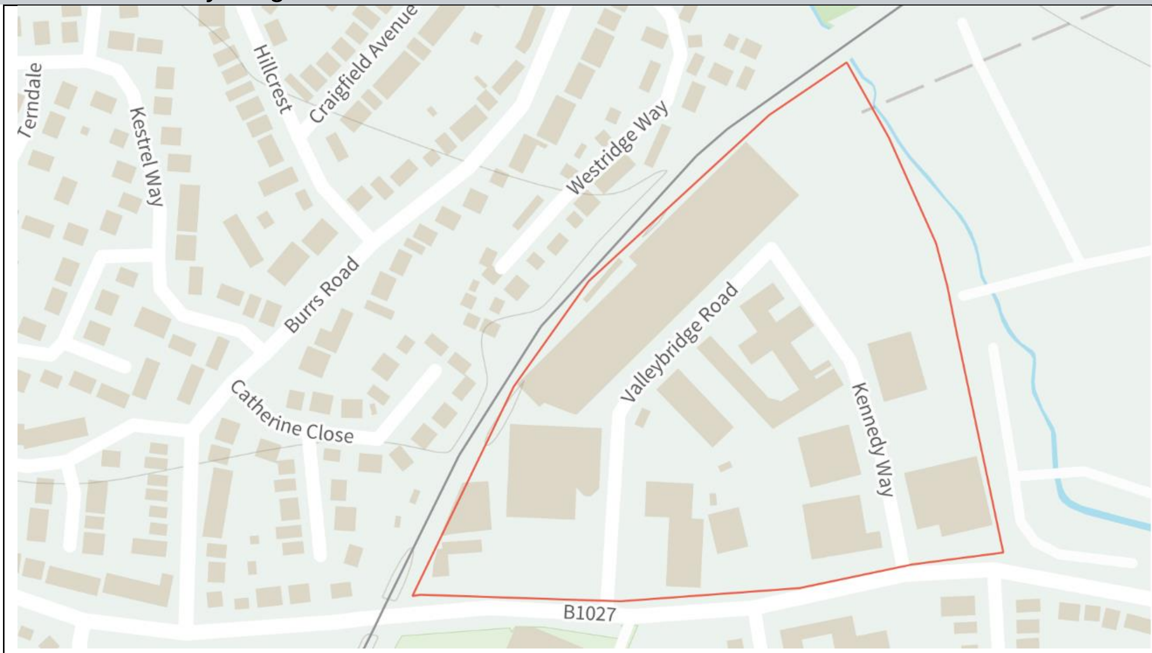
Size, ha	Part of Gorse Lane Industrial Estate (38.07)
Building Age Range	1990s/Modern
Average Building Quality	Generally good quality
Constraints	No visible constraints SAMU3 site to the north includes a watercourse which crosses the site. The Local Plan indicates that any development on site should include early engagement with Anglian Water to ensure that sufficient capacity in the local foul water system is created to accommodate the new development.
Critical Mass	Within well-established employment area. Strong occupancy and good supply. Clacton Shopping Village is located immediately to the east.
Opportunities for redevelopment/ expansion	Current site fully developed. Land to the north is allocated as site SAMU3, albeit with no part allocated for employment. This area has seen the most recent additional development with some additional units being provided off Fowler Rd.
Score (Max 90) / Recommendations	55

Table G.3 Gorse Lane Industrial Estate, Clacton

Name	Gorse Lane Industrial Estate, Clacton
Description	Significant, operational employment area and Clacton's largest. More established than nearby Oakwood. Mix of smaller terraced and larger, two-storey industrial/warehouse units, with some historically lost to other uses (e.g. gym and children's play area)
Key Occupier(s)	Dura Composites TMB Suite and Sofa Centre First Group depot
Prominence	Strong prominence with good access off Thorpe Rd/B1442 roundabout
Current Use (Use Classes)	B1(a), B1(c), B2, B8
Size, ha	38.07
Building Age Range	40 years +/some modern
Average Building Quality	Some good quality industrial units, with a number of lower quality units. Strong level of occupancy however, with no visible vacancy.
Constraints	Access to allocated strategic development site. Some historic units A number of units on the estate are in use by non-traditional employment uses. Whilst these provide amenities on site (e.g. gym and children's play centres)

	there has been a reduction in floorspace for traditional employment uses.
Critical Mass	Greater critical mass than nearby Oakwood, however much higher density.
Opportunities for redevelopment/ expansion	Sits to the south of the Oakwood Park Strategic Development allocation off Telford Road (6.8 ha). Question over suitable access to be raised via current highways.
Score (Max 90) / Recommendations	54

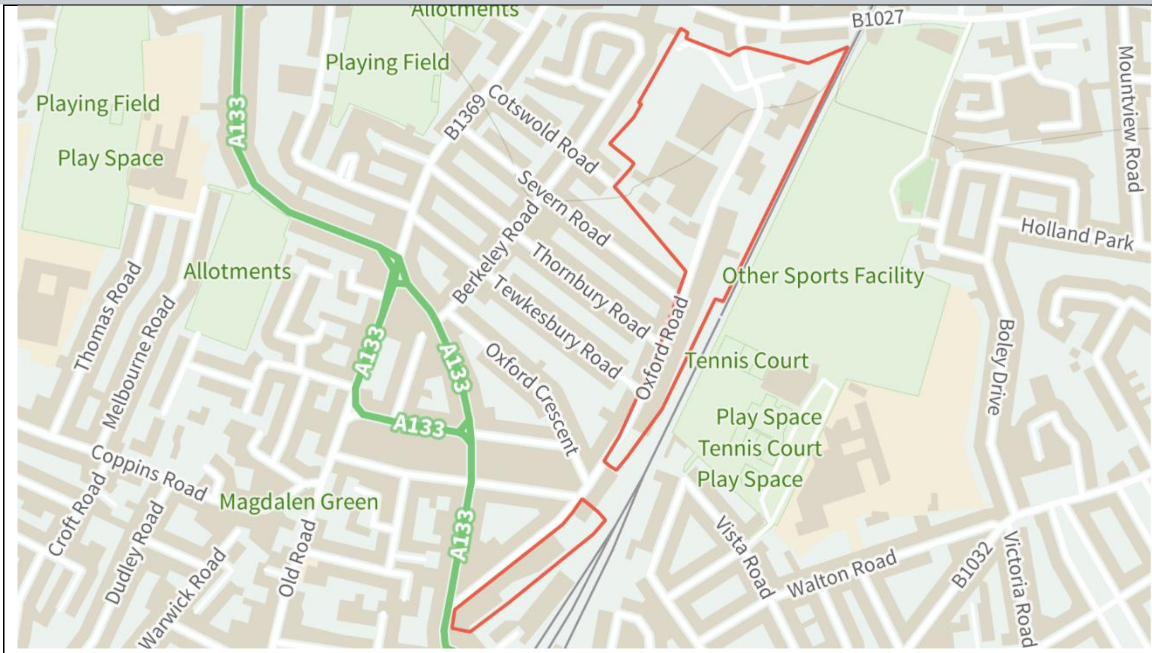
Table G.4 Valleybridge Road industrial Estate, Clacton



Name	Valleybridge Road Industrial Estate, Clacton
Description	Mix of larger retail at the entrance off Valley Road in converted industrial units, with traditional industrial estate occupying the remainder of site. Brick/faded clad facades. High occupancy levels. Some office content in the eastern section of the site.
Key Occupier(s)	Farmfoods The Range Prestige Kennedy House (NHS)
Prominence	Good visibility off B1027.
Current Use (Use Classes)	B1(a), B1(c), B2, B8, A1.
Size, ha	44.2
Building Age Range	1970s/80s (B-class)/Modern (A-class)
Average Building Quality	Generally good to average quality. No new build. Electricity sub-station in the centre of the industrial premises. Average office quality, with well-presented however aging brick facades.
Constraints	Electricity sub-station. Access narrow in parts.

	Entrance/exit on to busy B1027.
Critical Mass	Well established industrial area with good occupancy.
Opportunities for redevelopment/ expansion	No on site opportunities for expansion
Score (Max 90) / Recommendations	51

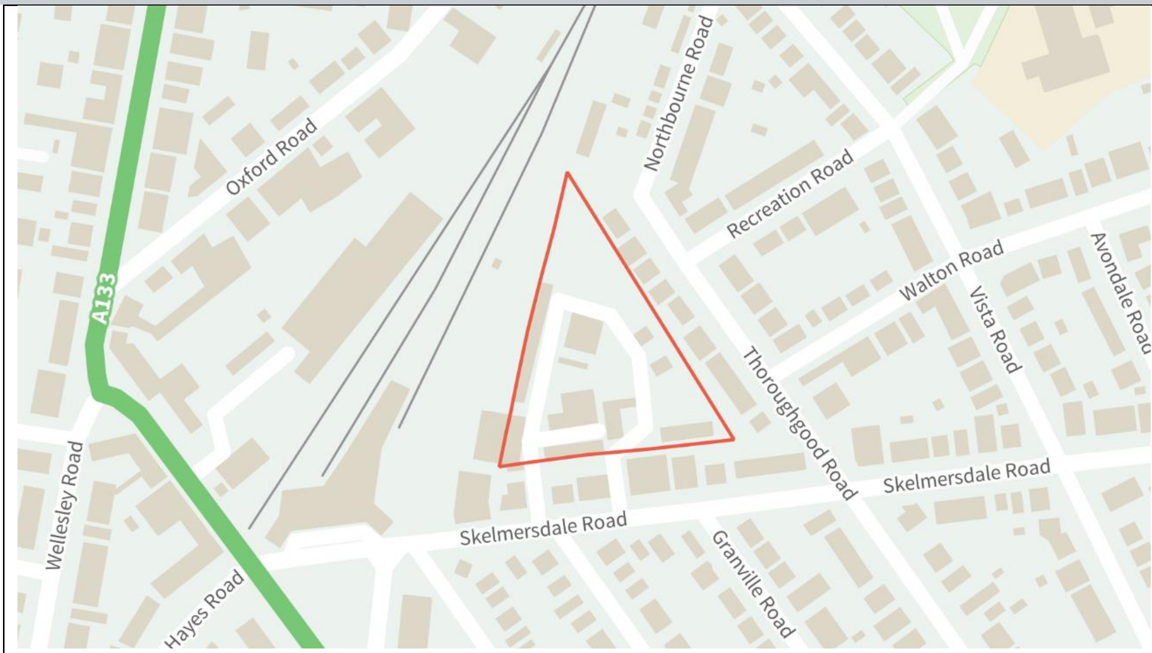
Table G.5 Oxford Road Industrial Estate, Clacton



Name	Oxford Road Industrial Estate, Clacton
Description	Irregular layout comprising a row of trade counter uses with more traditional industrial units to the North. ASDA store at the northern-most point
Key Occupier(s)	Travis Perkins Topps Tiles Nico
Prominence	Runs adjacent to railway and Oxford Road. Good prominence given the nature of layout
Current Use (Use Classes)	A1, B1(a), B2
Size, ha	9.61
Building Age Range	40 years +
Average Building Quality	Generally average, single-storey trade counter uses, however some with updated facades improving appearance. Larger units in the north of good quality, however historic.
Constraints	Site runs adjacent to busy road with strong traffic activity and narrow access causing some issues for HGV vehicles
Critical Mass	Well established employment area with strong tenants in the north.

Opportunities for redevelopment/ expansion	The Silverton site is the subject of Local Plan representations and a number of unsuccessful planning applications to revert to residential. Pressure for residential development in recent years with some land lost to 100% residential and other land lost to mixed commercial/residential.
Score (Max 90) / Recommendations	46

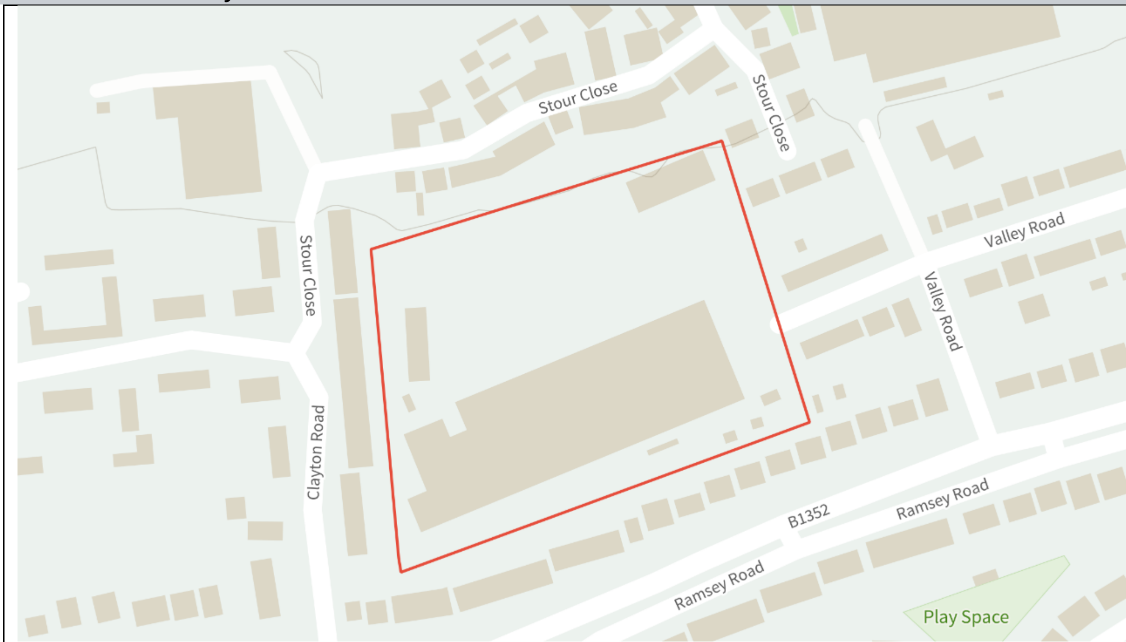
Table G.6 Sadds Yard, Clacton



Name	Sadds Yard, Clacton
Description	Low quality primarily terraced light industrial units. Smaller employment area previously allocated in the emerging Local Plan for mixed-use development. Some vacancy.
Key Occupier(s)	ABC Scrap Metals ACP Landscapes AJs Motorcycles Crown Joinery Eurocar Services
Prominence	Access off Skelmersdale Road, however set back behind residential premises
Current Use (Use Classes)	B1, B2
Size, ha	40 years +
Building Age Range	1.6
Average Building Quality	Generally poor, terraced units.
Constraints	Narrow compromised access to site. Nearby highways not tuned towards heavier, industrial traffic
Critical Mass	Generally well occupied with significant site density, however bounded by existing residential.

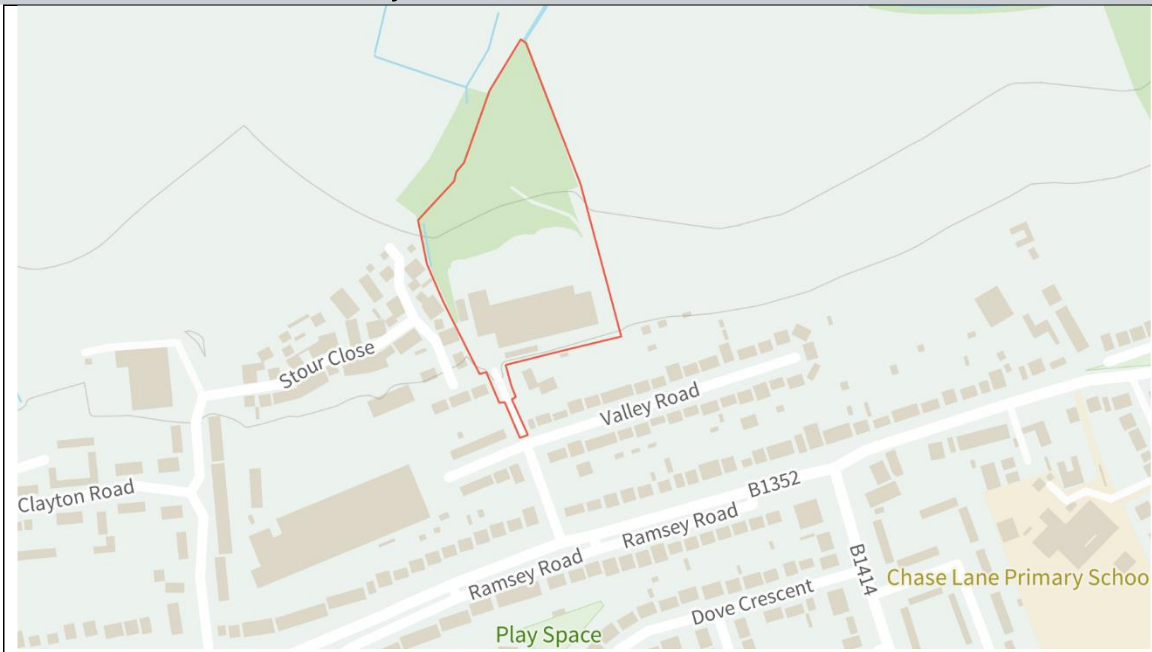
Opportunities for redevelopment/ expansion	Could only work as redevelopment, rather than expansion given the current site density. The site was identified in a previous Town Centre regeneration plan as a potential ‘opportunity site’ for redevelopment alongside the upgrading and improvement of the railway station.
Score (Max 90) / Recommendations	42

SATO Site, Valley Road, Harwich



Name	SATO Site, Valley Road, Harwich
Description	Single business site occupied by SATO, a labelling company. Self-contained site, generally bound by residential use. The site incorporates a historic factory, which SATO intend to redevelop for housing, as well as a new facility and significant greenspace.
Key Occupier(s)	SATO
Prominence	Sits within residential area and bounded on all sides.
Current Use (Use Classes)	B2, B8
Size, ha	2.2
Building Age Range	1970s/80s, plus modern unit
Average Building Quality	Good quality premises in full operation.
Constraints	Poor prominence and generally restricted access around residential premises off Valley Road Potential noise issue depending on redevelopment No other visible constraints
Critical Mass	Single site occupier, however in captive area for new residential development as planned.
Opportunities for redevelopment/ expansion	Old factory to be redeveloped with 38 homes.
Score (Max 90) / Recommendations	33

Table G.7 Durite Works, Valley Road, Harwich



Name	Durite Works, Valley Road, Harwich
Description	Single business site occupied by Durite. Self-contained and generally bound by residential use. Site incorporates existing Durite facility, with a small level of associated greenspace.
Key Occupier(s)	Durite
Prominence	Sits within residential area and bounded on all sides.
Current Use (Use Classes)	B2, B8
Size, ha	1.0
Building Age Range	1970s/80s
Average Building Quality	Good quality premises in full operation.
Constraints	Potentially restricted access around residential premises Potential noise issue depending on redevelopment No other visible constraints.
Critical Mass	Single site occupier, however in captive area for new development.
Opportunities for redevelopment/ expansion	Some capacity for expansion on current site, otherwise bounded by residential to the south and west. Harwich Valley development site located to the North.

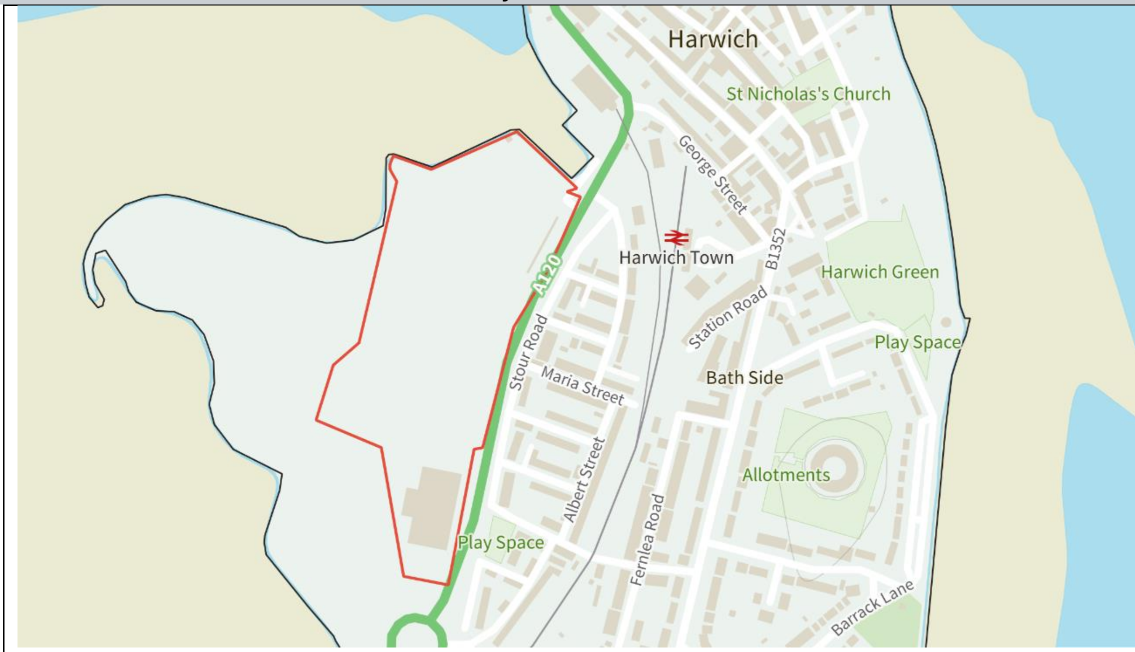
HATCH REGENERIS

	Business controls some land to the north and might be interested in a ‘SATO-style’ land swap (i.e. new replacement factory and some houses).
Score (Max 90) / Recommendations	33

Table G.8 Europa Way, Parkeston

Name	*Europa Way, Parkeston*
Description	Established employment area. Site comprises five separate industrial/warehouse building with appropriate yard areas. Good prominence and strategic location (both highway and port) with access directly off the A120.
Key Occupier(s)	Surya Foods
Prominence	Good access off A120.
Current Use (Use Classes)	B2, B8
Size, ha	4.38
Building Age Range	1980s
Average Building Quality	Good quality units, well occupied.
Constraints	Potential flood risk issues
Critical Mass	Within well-established employment area and well occupied. Located near a number of large retail options, with Harwich Port to the North.
Opportunities for redevelopment/ expansion	No visible options for expansion on site. Vacant land to the east and west.
Score (Max 90) / Recommendations	73

Table G.9 Mercedes Site, Bathside Bay



Name	Former Mercedes Site, Bathside Bay
Description	The site comprises flat, open land which has the potential for open storage, as well as a large industrial warehouse of around 5,000 sqm The majority of the site is under use as timber yard (fencing)
Key Occupier(s)	Formerly Mercedes
Prominence	Strong prominence off A120.
Current Use (Use Classes)	B2
Size, ha	2.77
Building Age Range	1970s/80s
Average Building Quality	Although site is primarily vacant, the Premier Labellers facility is of average quality
Constraints	The Local Plan indicates that the site sits within a flood zone and has known ground stability issues, as well as potentially being contaminated. Any planning application must therefore show how such constraints can be mitigated.
Critical Mass	Site sits further east in isolation from Stanton Europark and Europa Way.
Opportunities for redevelopment/ expansion	Much of the site is used for storage and therefore offers room for intensification of the existing proximal port facilities.

	The wider Bathside Bay project has secured planning permission which is subject to a condition that development must be commenced before 2021 (10/0202/FUL). It is considered that the Mercedes site will aid the enabling of this permission by providing a site for the relocation of an existing small boat quay, as well as further facilities.
Score (Max 90) / Recommendations	66

Table G.10 Kirby Cross Trading Estate, Clare Road, Kirby Cross

Name	Kirby Cross Trading Estate, Clare Road, Kirby Cross
Description	Small industrial employment area comprising a good range of one and two-storey industrial units. Occupiers appear generally historic, with tenants geared towards MOT/servicing and car body repairs.
Key Occupier(s)	Kirby Cross MOT Centre The Complete Home Improvement Company JCW Car Body Repairs
Prominence	Located off B1033, however sits within an otherwise residential area
Current Use (Use Classes)	B1(c), B2
Size, ha	1.0
Building Age Range	1960s/70s
Average Building Quality	Generally average terraced industrial units, supplemented by some relatively good quality larger industrial premises.
Constraints	No visible constraints
Critical Mass	Small, fully occupied yet well-established employment area.
Opportunities for redevelopment/ expansion	There is vacant land at the eastern end of the site which has been allocated for employment use in previous versions of the Local Plan. There have been unsuccessful attempts to obtain planning permission for a discount

	food store, but little commercial interest otherwise. Access to land is however not compromised.
Score (Max 90) / Recommendations	48

Table G.11 Harmer's Foundry, Walton on the Naze

Name	Harmer's Foundry, Walton on the Naze
Description	Poor quality industrial area primarily occupied by scrap and timber merchants. No visible vacancies, with occupants generally comprising historic tenancies.
Key Occupier(s)	A1 Walton Salvage Elite Fencing & Timber Mills
Prominence	Located off Hall Lane, but with very little prominence from the entrance road
Current Use (Use Classes)	B1(a), B1(c), B2
Size, ha	1.12
Building Age Range	40 years +
Average Building Quality	Poor quality historic units and industrial yard space. One single example of a recent good quality industrial unit, within the bounds of Elite Fencing & Timber Mills. Small, poor quality, single storey office at entrance.
Constraints	Narrow access on tight bend Poor estate road surface Heavy industrial – scrap and recycling uses – have led to poor quality conditions on the estate.
Critical Mass	Fully occupied, high-density site in an otherwise residential area

Opportunities for redevelopment/ expansion	No current expansion opportunities within the bounds of current employment area. Bounded to the north and south by areas of heavily wooded land.
Score (Max 90) / Recommendations	20

Table G.12 Lawford Dale Industrial Estate, Manningtree

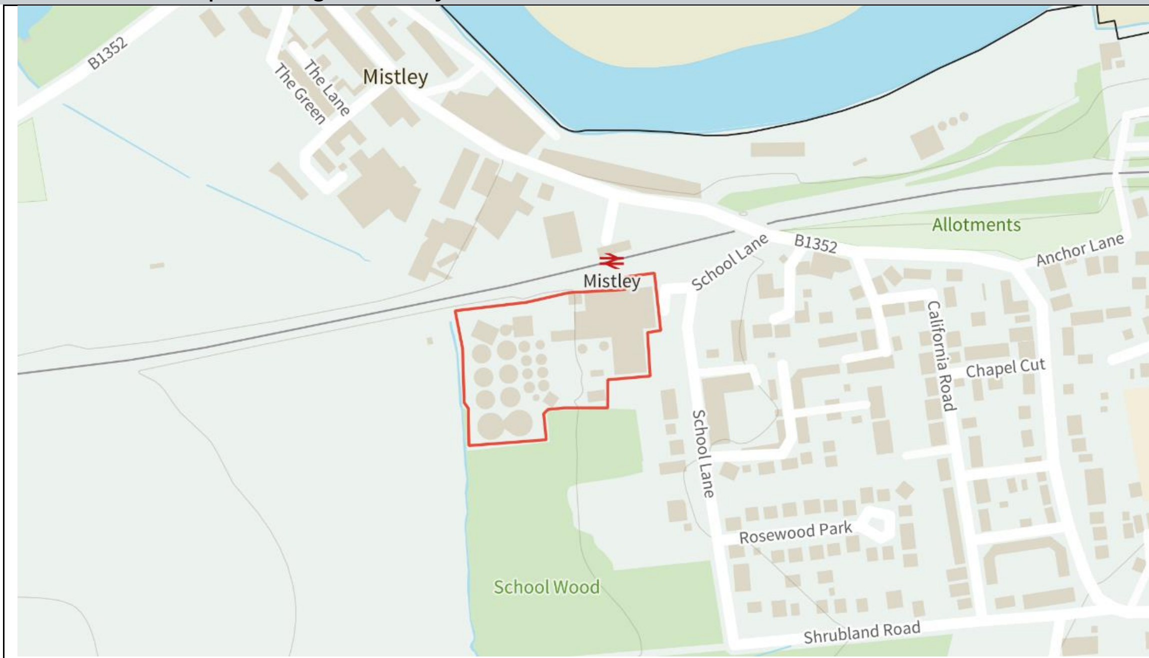
Name	Lawford Dale Industrial Estate, Manningtree
Description	Moderate/good quality industrial location comprising a number of different schemes. Some office content, however primarily an industrial location.
Key Occupier(s)	Manningtree Tiles and Flooring Wiliams Newman Joinery AMC Prestige Cars Pultrex Frutarom UK (occupying 10 individual neighbouring units) Occupiers appears to need to take multiple adjoining units, presumably due to lack of larger options
Prominence	Strong prominence off B1352
Current Use (Use Classes)	B1(a), B1(c), B2
Size, ha	18.77
Building Age Range	1970s/80s
Average Building Quality	Generally good to average quality industrial and terraced office space. Some poor examples of historic vacancies
Constraints	Entrance via busy B1352 appears an intermittent issues for larger HGVs Some areas of estate road are in need of repair

	Estate split by railway track (bridge) which is low and restricting to larger commercial vehicles
Critical Mass	Well occupied and strong, well-established employment area.
Opportunities for redevelopment/ expansion	Small parcel of land in the north of the site, to the east of Ace Auto Salvage. Sizeable yard space configuration allows for large commercial vehicles, plus potential for individual unit expansion. Some examples of vacancy, however in historic units which may benefit from being purely regenerated, rather than being occupied.
Score (Max 90) / Recommendations	52

Table G.13 EDME Malings, Mistley

Name	EDME Maltings, Mistley (working with owners to secure the future reuse of heritage buildings)
Description	Intensely developed and operational cereal mill facility, occupied by EDME. Mix of mill buildings and large storage tanks with little circulation space for vehicles.
Key Occupier(s)	EDME
Prominence	Off B1352 and fronting the road. Satisfactory local prominence, however links to strategic routes is lacking.
Current Use (Use Classes)	B2
Size, ha	1.5
Building Age Range	40 years +
Average Building Quality	Historic but generally good external condition.
Constraints	Little vehicle circulation Access to be improved Lack of access to strategic routes
Critical Mass	Sits within a wider small employment area.
Opportunities for redevelopment/ expansion	Historically suitable for occupiers, however we understand that EDME are now looking to vacate, indicating that the site is reaching the end of its life as a primarily employment area.
Score (Max 90) / Recommendations	45

Table G.14 Crisp Maltings, Mistley

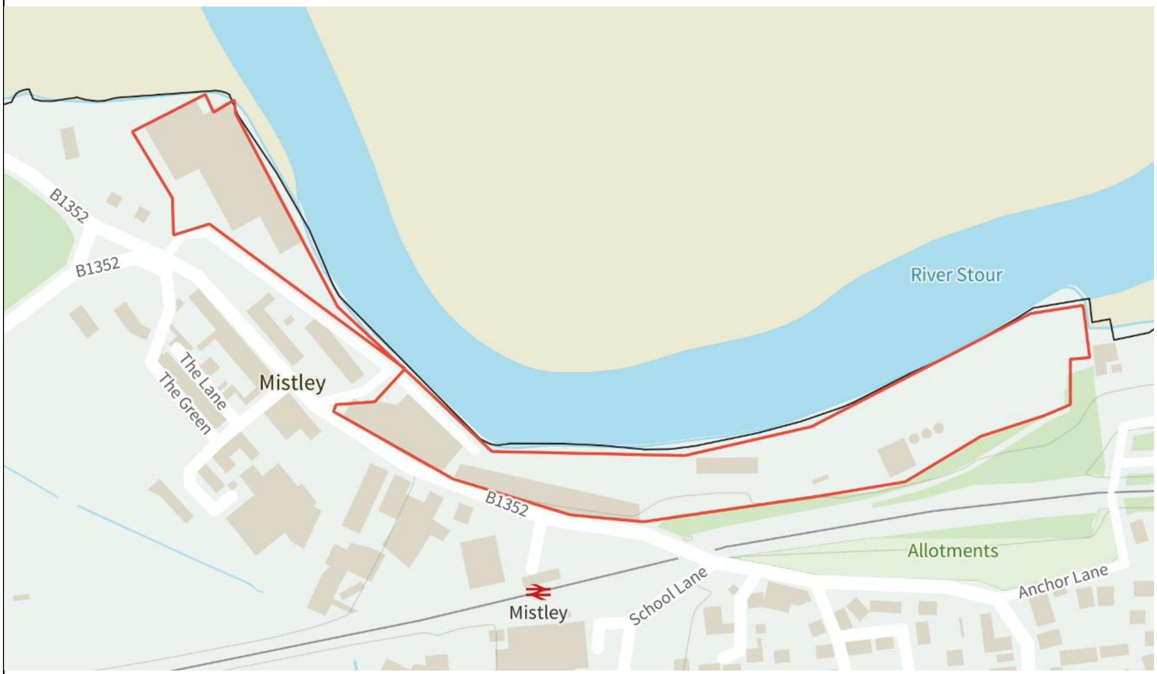


Name	Crisp Maltings, Mistley
Description	Maltings Facility in full operation and lying adjacent to residential development.
Key Occupier(s)	Crisp Malting Group
Prominence	Accessed via School Lane off B1352, therefore not hugely prominent. The access road and adjacent railway also result in poor general access.
Current Use (Use Classes)	B2
Size, ha	1.5
Building Age Range	40 years +
Average Building Quality	Some historic buildings, but generally good external quality
Constraints	Potentially comprised, narrow access for larger commercial vehicles via B1352
Critical Mass	Sits within a wider small employment area.
Opportunities for redevelopment/ expansion	Intensely developed site with no apparent opportunities for development.
Score (Max 90) / Recommendations	45

Table G.15 Mistley Marine, Mistley

Name	Mistley Marine, Mistley
Description	Riverside site encompassing marine related engineering occupiers. Boat storage and moorings also present.
Key Occupier(s)	Mistley Marine & Leisure Ltd
Prominence	Accessed off High Street via B1352. Generally poor prominence due to tree line and elevation from main B-road.
Current Use (Use Classes)	B2
Size, ha	0.9
Building Age Range	40 years +
Average Building Quality	Average
Constraints	Flood risk due to location
Critical Mass	Sits within a wider small employment area.
Opportunities for redevelopment/ expansion	Presumption that any future development would be a comprehensive scheme also encompassing the neighbouring Mistley Port.
Score (Max 90) / Recommendations	41

Table G.16 Mistley Port, Mistley



Name	Mistley Port, Mistley
Description	Operational port. Based riverside and occupied by a number of marine/port related uses
Key Occupier(s)	Trent Wharfage Ltd
Prominence	Accessed off High Street via B1352. Generally poor prominence due to tree line and elevation from main B-road.
Current Use (Use Classes)	B2
Size, ha	3.1
Building Age Range	40 years +
Average Building Quality	Average
Constraints	Flood risk due to location
Critical Mass	Sits within a wider small employment area.
Opportunities for redevelopment/ expansion	Presumption that any future development would be a comprehensive scheme also encompassing the neighbouring Mistley Port.
Score (Max 90) / Recommendations	39

Table G.17 Morses Lane Industrial Estate, Brightlingsea

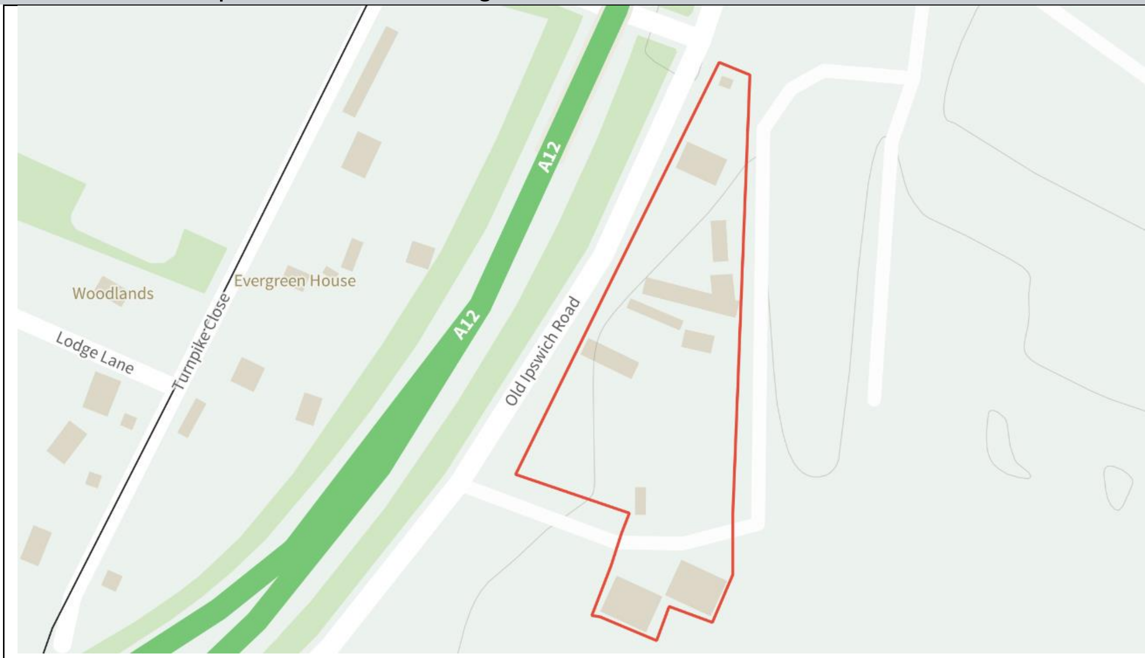
Name	Morses Lane Industrial Estate, Brightlingsea
Description	Fairly good quality, small industrial estate. Primarily standard industrial premises with recycling/scrap yard in the north.
Key Occupier(s)	Academy Windows Premier Moving Services CNC Machining
Prominence	Located off Samsons Rd with large, visible entrance beside established supermarket
Current Use (Use Classes)	B1(c), B2
Size, ha	3.4
Building Age Range	1970s/80s
Average Building Quality	Generally good quality existing units
Constraints	No visible constraints
Critical Mass	Well occupied and established employment area Large Co-Op supermarket next to site. Town & Country housing development under construction nearby.
Opportunities for redevelopment/ expansion	Small parcel of land for potential expansion to the east of existing site, with land also to the north.
Score (Max 90) / Recommendations	38

Table G.18 Shipyard Estate, Brightlingsea

Name	Shipyard Estate, Brightlingsea
Description	Large shipyard estate with a number of poor quality historic industrial buildings. Some level of dereliction amongst the historically vacant units on site.
Key Occupier(s)	Advantage Sails Brightlingsea Recycling Eurotex
Prominence	Poor access via narrow entrance off Waterside.
Current Use (Use Classes)	B1(c), B2
Size, ha	1.74
Building Age Range	40 years +
Average Building Quality	Generally poor quality historic shipyard buildings and industrial units. Some dereliction.
Constraints	Poor access for commercial vehicles via single track. Large HGV's moving in and out with difficulty, especially as local roads are also narrow. Existing vacant units in poor repair.
Critical Mass	Pure Lake flat development nearby
Opportunities for redevelopment/ expansion	A number of derelict units may require redevelopment. Greenfield land to the North with potential capacity for development.

Score (Max 90) / Recommendations	23

Table G.19 Old Ipswich Road, Ardleigh



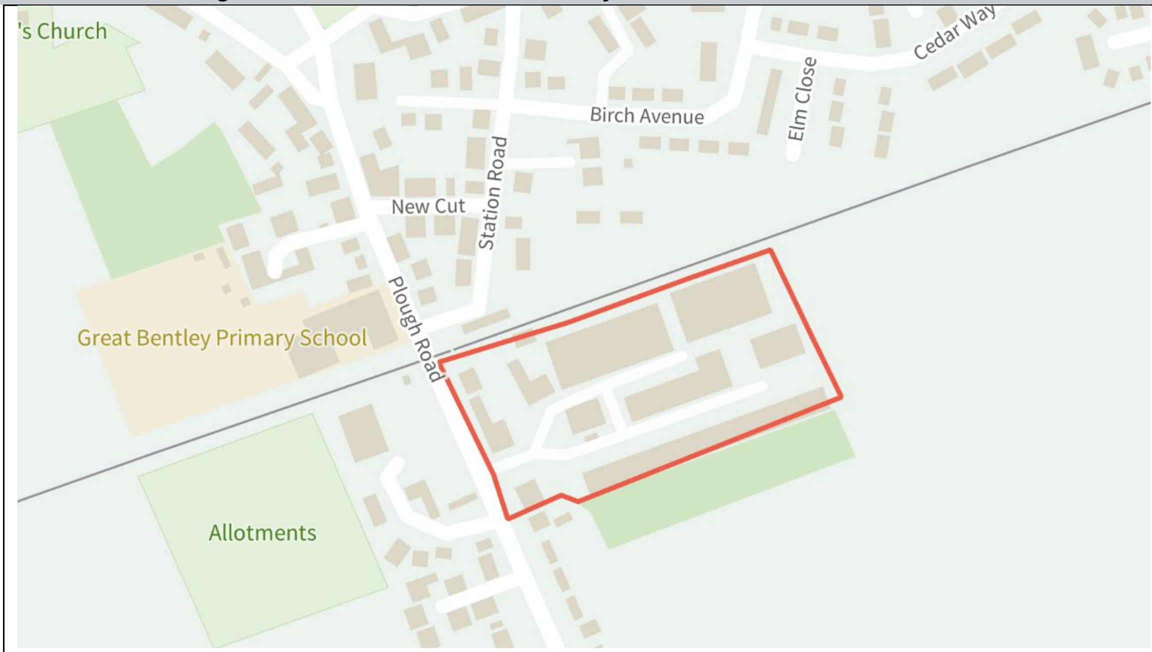
Name	Old Ipswich Road, Ardleigh
Description	Small employment area comprising two unconnected sites in separate ownership. Mix of industrial and portacabin-style office units with large associated yard space.
Key Occupier(s)	Kier Construction DTE Scaffolding and Safety Netting
Prominence	Located off and fronting on to Old Ipswich Road. Both compounds gated but highly visible from road. Very close to Colchester and to the north of the A120.
Current Use (Use Classes)	B1(c), B2
Size, ha	N/a
Building Age Range	1970s/80s
Average Building Quality	Average quality industrial units with a number of single-storey portacabin-style office units.
Constraints	Tight access off main Old Ipswich Road.
Critical Mass	Fully occupied employment area
Opportunities for redevelopment/ expansion	Crown Business Park site sits to the south as what is currently a golf driving range. Also, potential opportunity to develop on yard space in current site.
Score (Max 90) / Recommendations	46

Table G.20 Lanswood Park, Elmstead Market

Name	Lanswood Park, Elmstead Market
Description	Modern office park offering Grade A accommodation in semi-detached units. Presents as the highest quality B1(a) offer in Tendring.
Key Occupier(s)	Lightsense Bluebird Care Harp Commercial Interiors HG Hagesan Franklins Site also offers Shed Café to all occupiers.
Prominence	Strong access off A133 with estate signage visible
Current Use (Use Classes)	B1(a)
Size, ha	2.2
Building Age Range	Modern, new build
Average Building Quality	Good quality, Grade A new build
Constraints	No visible constraints
Critical Mass	Existing stock well occupied, however site is somewhat isolated from other employment areas.
Opportunities for redevelopment/ expansion	Phases 2/3 of current masterplan under construction – 2 new office units in the same configuration as existing. Current masterplan in place to develop further.

	Grange Park housing development to the east.
Score (Max 90) / Recommendations	69

Table G.21 Plough Road Centre, Great Bentley



Name	Plough Road Centre, Great Bentley
Description	Small business centre comprised primarily of industrial units with element of office space at the entrance. Office space comprised of four buildings – Beaver House, Southgate House, Plough Farm House, Northgate House.
Key Occupier(s)	Cars 2 U J&B Car Commercials
Prominence	Business Centre fronts onto Plough Road with good local prominence.
Current Use (Use Classes)	B1(a), B2
Size, ha	2.0
Building Age Range	1980s/90s
Average Building Quality	Generally good quality office and industrial units. Mixture of traditional two-storey units and covered workshops.
Constraints	No visible constraints.
Critical Mass	Strong occupancy. Primarily car uses.
Opportunities for redevelopment/ expansion	Allocated land for expansion to the east. Current access is potentially suitable, however would need improvement due to density of units in current configuration.
Score (Max 90) / Recommendations	51

Table G.22 Martell's Pit Industrial Estate, Ardleigh

Name	Martell's Pit Industrial Estate, Ardleigh
Description	Small industrial estate surrounded by quarry and scrap/recycling uses. Only a small number of units on site, which are well occupied.
Key Occupier(s)	SRC Aggregates NMR Engineering Curtis Machine Tools Arrow Composite Equipment
Prominence	Very rural location with poor access off Slough Road.
Current Use (Use Classes)	B2
Size, ha	8.03
Building Age Range	40 years +
Average Building Quality	Generally average industrial units – CMT unit appears most modern due to recladding. Otherwise estate is in poor condition due to historic, heavy industrial uses.
Constraints	Rural location and single track access Sloped estate and split entrances to premises within the estate Current scrap and quarry uses have resulted in poor conditions on site.

Critical Mass	Poor critical mass with few existing occupiers and little draw to attracting new tenants.
Opportunities for redevelopment/ expansion	Greenfield land to the north and west, however heavily wooded. Location and access is however rural and could impose logistical restrictions of any potential future development. Does present an opportunity to house future 'dirty uses' including waste and further recycling.
Score (Max 90) / Recommendations	27

Table G.23 Rice Bridge Industrial Estate, Thorpe le Soken

Name	Rice Bridge Industrial Estate, Thorpe le Soken
Description	Small industrial estate close to the railway station comprising a small number of units.
Key Occupier(s)	Comus Europe (large office occupier at entrance of site. MOT Garage
Prominence	Accessed via B1414, however not wholly prominent from road.
Current Use (Use Classes)	B1(a), B2
Size, ha	1.47
Building Age Range	40 years +, plus 1980s/90s (B1(a))
Average Building Quality	Generally average and poor industrial premises with average quality office building at the entrance of the site (occupied entirely by Comus Europe).
Constraints	Pylon sits on the edge of site, however lines only run adjacent to current boundary. Narrow access from main B-road
Critical Mass	Few existing occupiers with little capacity for growth or attracting new occupiers.
Opportunities for redevelopment/ expansion	Land with good current access to the east of current employment area.

	Large yard space also in the easternmost point of the site potentially present an option for expansion of MOT centre or new build.
Score (Max 90) / Recommendations	48

Table G.24 Frating

Name	Frating
Description	Employment area comprising two large employers and a smaller industrial estate
Key Occupier(s)	Penguin Random House Distribution Manheim Car Auctions
Prominence	Good prominence with site running both adjacent to and accessed off A133.
Current Use (Use Classes)	B1, B2, B8
Size, ha	Part of wider 273 ha site
Building Age Range	1970s/80s
Average Building Quality	Generally good quality, large scale distribution centres. Smaller industrial units of a lower quality, but still good external condition.
Constraints	Heavy traffic flow, especially given the nature of Manheim’s business Single carriageway access
Critical Mass	Fully-occupied with good quality tenants
Opportunities for redevelopment/ expansion	Potential room for expansion to the north of the Penguin site, but entire area sits on the southern border of the New Garden Village Masterplan. Further employment land is detailed in this masterplan to the east, on the other side of A133.

Score (Max 90) / Recommendations	62

Appendix H - Future Employment Demand Scenarios Method

H.1 This appendix provides a description of the method used to derive future employment land needs from economic forecasts, population projections and completions data from previous years. The method used to convert employment forecasts into future employment land need is also used in the labour force scenario once the number of residents in employment is identified from local authorities' population projections.

Employment-led Scenario

H.2 Hatch Regeneris commissioned Experian UK to produce an employment forecast for Tendring based on population projections that have been used to inform the District's OAN and that have been approved at EiP. These projections were produced by PBA and address the distortions created by errors in international migration data. The employment forecasts are then translated into a requirement for floorspace by considering the nature of employment in each sector, and the implications for the types of floorspace which employment in the sector will need to grow. The following categories of floorspace are used in the assessment of employment land need in Tendring:

- **B1a/ B1b:** office-based and research and development (R&D) uses;
- **B1c/ B2:** light industrial and manufacturing; and
- **B8:** logistics and distribution.

H.3 The following are the steps used in translating the Experian employment forecasts into employment land need:

- **Step 1:** deduct home workers and employees with no fixed address from employment forecasts/ number of residents in employment based on data from the 2011 Census of Population. This way, the assessment of employment land need includes only employees that require a physical space (either B1a/ B1b, B1c/ B2 or B8) in which to work.
- **Step 2:** allocate employment use-classes to detailed four-digit SIC sectors (using Hatch Regeneris's in-house Employment Land Need model).
- **Step 3:** estimate the proportion of employment from the detailed four-digit SIC for each of the categories represented in the Experian employment forecasts. For the labour supply scenario, residents in employment are assigned to the sectoral profile identified by the Experian employment forecasts. This exercise uses the latest available Business Register and Employment Survey (BRES) for Tendring.
- **Step 4:** use these proportions as 'weights' to derive the total number of jobs in each sector which will require different types of (office, industrial and logistics) floorspace.
- **Step 5:** convert total employment in full-time equivalent (FTE) jobs at the broad sector level. This is based on the ratio of full-time and part-time employment taken from BRES. It is assumed that two part-time jobs constitute one full-time equivalent job.
- **Step 6:** convert the total number of FTE jobs in each use class into floorspace by applying employment densities from the Homes and Communities Agency (HCA) *Employment Density Guide* (November 2015), as follows:

  - **B1a** – 15 sq. metres per FTE;
  - **B1b** – 63 sq. metres per FTE;
  - **B1c** – 59 sq. metres per FTE;
  - **B2** – 38 sq. metres per FTE; and
  - **B8** – 77 sq. metres per FTE.

- **Step 7:** make a 10% allowance to all floorspace requirements (except where demand is expected to fall) to reflect normal levels of vacancy in employment space.
- **Step 8:** A further safety margin of 10% is added to allow for flexibility and to provide a choice of sites for potential occupiers. This is only added where demand for floorspace is growing.
- **Step 9:** The next step in identifying employment land need for 2017-33 is to translate the demand for floorspace into overall land requirements. This is determined by the nature of employment land development in the district in addition to the type of floorspace delivered. This is based on typical plot ratios (ie. ratios looking at the relationship between gross floorspace and total site area) for each B-class, land-use type. The following plot ratios were used to convert floorspace into employment land requirements:
  - Office (B1a and B1b) - 0.5 ha (2 storeys)
  - Manufacturing (B1c and B2) - 0.4 ha (single storey)
  - Storage (B8) - 0.5 ha (single storey)
- **Step 10:** convert employment land requirements to land area (in hectares).

Labour Supply Scenario

H.4 The labour supply scenario takes projected population changes in the district (based on housing delivery each year over the Plan period) to derive the implied size of the workforce as well as the number of jobs that this could support. The approach used to calculate employment land need based on changes to the labour force, is similar to that used in the assessment of the district's Objectively Assessed Housing Need (OAN) and makes use of the POPGROUP model. Once the size of the labour force is determined, current and future sectoral make-up of the district's economy are applied to the labour force, and the demand for employment land need is calculated based on steps 1-10 above.

Past-Completions Scenario

H.5 The past-completions scenario is based on average annual completions for office, industrial and logistics floorspace. The sources of data and an explanation of these averages are explained fully in Chapter 6.

H.6 Once employment floorspace need for the period 2017-33 is identified, employment floorspace is converted into employment land requirements using the assumptions above (step 9 under the employment-led scenario) and finally converted to land area requirements in hectares (as per step 10 above).

HATCH REGENERIS

www.hatchregeneris.com
London: +44(0)207 336 6188 Manchester: +44(0)161 234 9910