
**Strategic Employment
Sites**

FINAL REPORT

Strategic Employment Sites

May 2009

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Contents

	Page	
1	Introduction	4
	1.1 Purpose of the Study	4
	1.2 Approach	4
	1.3 Structure of this Report	5
2	Defining Strategic Employment Sites	6
	2.1 Meeting the Needs of Business and Communities	6
	2.2 What is a Strategic Employment Site?	6
	2.3 Definition	12
	2.4 Hierarchy of Strategic Employment Sites	15
	2.5 Local Employment Sites	17
	2.6 Take Up of Strategic Sites	17
3	Assessment and Prioritisation of Sites	19
	3.1 Approach	19
	3.2 The 'Long List' of Sites	20
	3.3 Identification of Sites with Future Capacity	20
	3.4 Identification of Local v Strategic Employment Sites	21
	3.5 Prioritisation of Sites	21
4	RSS and RES Policy Objectives	26
	4.1 Meeting RSS Policies	26
	4.2 RES Policies	31
5	Meeting Market Needs	37
	5.1 Context and overview	37
	5.2 Property Market Considerations	37
	5.3 Identification of Key Sectors	40
	5.4 Sector Analysis and Forecasts	41
	5.5 Advanced Engineering	44
	5.6 Life-sciences, Pharmaceuticals and Biotechnology	46
	5.7 Agriculture and Food Production	47
	5.8 Financial & Business Services	48
	5.9 Computer Services and ICT	49
	5.10 Environmental Technologies & Energy	50
	5.11 Creative Industries	51
	5.12 Transport and Logistics	52
	5.13 Summary of Findings	53
	5.14 Strategic Sites and Growth Sectors	54
6	Towards a Regional Action Plan	59

6.1	Overview	59
6.2	Raising Awareness	59
6.3	Addressing Developer Risks	60
7	Recommendations	62
7.1	Recommendation 1	62
7.2	Recommendation 2	62
7.3	Recommendation 3	62
7.4	Recommendation 4	64
7.5	Recommendation 5	64
7.6	Recommendation 6	65
7.7	Recommendation 7	65

Appendices

Appendix A

Employment Land Reviews

Appendix B

Key Investment Drivers and Demographics

Appendix C

Identified Sites and the Long List

Appendix D

Employment Site Recommendations

Appendix E

Regional Strategic Sites

1 Introduction

1.1 Purpose of the Study

The East of England Development Agency (EEDA) with the East of England Regional Assembly (EERA) commissioned Arup to undertake a Strategic Employment Sites Study of the East of England. The purpose of this study was to review the current strategic employment sites in the region and to set out a new approach to the future definition, prioritisation and delivery of such sites and an understanding of likely future demand. In particular, the key question for the study to answer was:

'What is the nature of strategic employment provision that is required to meet the East of England's economic needs and aspirations both at a regional and sub-regional scale and how is current provision relative to this?'

The East of England has high economic growth targets as set out in the Regional Economic Strategy (RES) and reflected in the East of England Plan. The delivery of a range of employment opportunities across the region of the quality and quantity required to meet the needs of business will be essential to achieving the levels of growth as set out in the long term. It will also be important to ensure that the East of England is in the best possible position as the economy recovers. The approach to the key strategic employment opportunities in the region is expected to be particularly significant in this respect. EEDA and EERA are therefore seeking to define sites that have inter-regional and regional significance and ensure that such sites meet the identified business and market needs in the time required. The identification of sites will:

- Inform EEDA's focus for intervention; and
- Inform EERA's review of the Regional Spatial Strategy (RSS) and Local Development Frameworks (LDFs).

It is important to note that this report is concerned with identifying future capacity and therefore does not identify all existing important employment sites. It is also important to note that strategic employment sites form only a small part of the East of England's sites portfolio. The identification and prioritisation of 'other sites' is addressed in the Employment Land Reviews (ELRs) undertaken by Local Planning Authorities. The identification of strategic employment sites is an important exercise, to ensure that these sites can be protected from other development pressures, in particular housing, once the economy recovers.

1.2 Approach

Arup's approach to the delivery of this study has been one of highly collaborative working, drawing on the knowledge of local authorities, private developers and the project steering group. The main methods applied include desk based research; a market workshop held in March 2009 with local commercial property agents and developers; and consultations with strategic planning authorities.

Following inception, a long list of strategically important sites was compiled through a desk-based review of existing strategies and policies and consultation with strategic planning authorities. This list was also reviewed and extended through the course of a workshop hosted to allow developers and their agents the opportunity to suggest sites. The workshop also provided an opportunity to confirm and secure region-wide buy in for the consultants' understanding of the concept of strategic sites and to confirm their interpretation of the East of England market context.

For each site a pro-forma was produced, drawing on existing local authority knowledge and policies as well as other web-based information sources. The pro-forma focused on the existing extent and use of the sites, as well as any vision for their further development. They were then used to support a short listing exercise described in detail within Section 3.1.

The initial ranking of sites was confirmed through discussions with County and Unitary Authorities and the steering group. Action plans were then produced for the top-tier of sites describing in detail the existing use and status of the sites as well as visions for their further development. The action plans were drafted to set out a clear route to the realisation of the visions for these important sites, reflecting any relevant market considerations or associated risks.

1.3 Structure of this Report

The report is presented in six further sections:

- Section 2 explores previous definitions of strategic employment sites and proposes a future definition and hierarchy of sites based around a set of criteria.
- Section 3 sets out the 'long list' of potential sites and, by way of the site selection criteria, those sites, which have been identified as strategic employment sites and the recommended prioritisation of these sites.
- Section 4 considers the identified portfolio of strategic employment sites in the context of the existing RSS and RES policies. The purpose of this section is to assess whether the portfolio meets RSS and RES objectives.
- Section 5 presents an analysis of anticipated sectoral growth in the East of England and the likely implications in terms of need for strategic employment sites.
- Section 6 presents a high level delivery plan the highest tier of strategic employment sites.
- Section 7 sets out our policy recommendations.

Further information and detail is provided in the appendices and a separate Annex Report:

- Appendix A provides a summary of progress to date around the region on producing Employment Land Reviews (ELRs) and schedules of definitions used for strategic employment sites.
- Appendix B explores key investment drivers identified in the Regional Economic Strategy and provides analysis of the demographics of the region.
- Appendix C presents schedules of identified strategic locations and sites in the RES, RSS and ELRs, as well as the 'long list' of potential sites.
- Appendix D sets out the recommendations for the prioritisation of each of the sites.
- Appendix E contains action plans for the regional strategic sites.
- Annex Report provides a compendium of pro forma for each of the potential sites on the long list.

2 Defining Strategic Employment Sites

2.1 Meeting the Needs of Business and Communities

There are no specific references to strategic employment sites in current and emerging national policy guidance¹ for economic development; however it establishes a number of principles, which provide a useful starting point for considering the need for, and potential roles of such sites. Namely:

- There is a need for sufficient available land to meet the different needs of business, and employment needs of communities;
- New sites should be readily capable of development and well served by infrastructure;
- Locational demands of businesses should be a key input to the identification of sites and sustainable travel should be promoted; and
- Planning should support existing, new and emerging sectors.

As would be expected these principles are reflected at the regional policy level in the Regional Spatial Strategy (RSS)² and Regional Economic Strategy (RES)³. For example, RSS Policy E2 emphasises the need to ensure that there is an adequate range, quantity and quality of sites/ premises at locations, which minimise commuting and meet the needs of the region's sectors and clusters. While Priority 3 for the Spatial Economy in the RES, stresses the importance of protecting, promoting and developing employment sites that support business growth and ensure economic viability.

2.2 What is a Strategic Employment Site?

Previous studies of this kind have tended to use size (e.g. greater than 10 ha) and significance (in terms of sectoral growth) prospects. A previous study on strategic employment sites in the East of England⁴ defined such sites as:

- Employment sites capable of accommodating a user requiring a plot of 10 hectares of more; or
- Special user sites, e.g. port or airport related.

It further defined sub-regional employment sites, as sites capable of accommodating a user requiring a plot of 1 hectare and having more than 4 hectares of developed land available.

However, the RSS EIP Panel Report noted that these definitions are 'somewhat rigid and not particularly suitable or helpful'; and therefore no reference was made to the Chesterton Study in the published RSS. In fact, the RSS does not define a strategic employment site, although it highlights that it must be 'readily serviceable' (Policy E3) and should meet the needs of businesses identified in employment land reviews.

The RSS identifies a number of locations where strategic employment sites should be particularly, although not exclusively provided and the rationale for this spatial strategy (Policy E3). The RSS acknowledges that in some locations, provision has already been allocated while in other areas, sites will need to be allocated. As set out in the RSS (Policies E2 and E3), one of the roles of Local Development Documents is to identify strategic employment sites and the suggested approach is that these would come forward through Employment Land Reviews (ELRs). A review of these documents around the region was thus undertaken.

¹ CLG (1992) Planning Policy Guidance 4: Industrial, Commercial Development and Small Firms; CLG (2007) Consultation Paper on a New Planning Policy Statement 4: Planning for Sustainable Economic Development; CLG (2008) Consultation of Planning Policy Statement 4: Planning for Sustainable Economic Development – Summary of Key Issues and Analysis of Consultation Responses

² GoEast (2008) East of England Plan, The Revision to the Regional Spatial Strategy for the East of England

³ EEDA (2008) Inventing Our Future Collection Action for a Sustainable Economy, The Regional Economic Strategy for the East of England 2008-2011

⁴ Chesteron plc (200) Study of Strategic and Sub Regional Employment Sites

RSS Policy E3

Local Development Documents should identify readily-serviceable strategic employment sites of the quality and quantity required to meet the needs of businesses identified through the employment land reviews referred to in policy E2. Sites should be provided particularly but not exclusively at the following regionally strategic locations:

- 'Bedford, Harlow, Stevenage, Hemel Hempstead and the Luton conurbation – to assist regeneration and ensure growth in key sectors and clusters;
- Thames Gateway, linked to the strategies for the key centres at Basildon, Southend-on-Sea and Thurrock Urban Area;
- Cambridge Sub-region, to secure its full potential as a centre for world-class research and development;
- Peterborough, to achieve regeneration, attract business activities and key sectors and clusters including environmental services;
- Norwich, to support regeneration and its role in bio-technology;
- Haven Gateway, to support growth and regeneration at Colchester and Ipswich, including the latter's role in ICT and development associated with port expansion at Harwich and Felixstowe;
- Great Yarmouth and Lowestoft, to support development associated with port expansion, regeneration and economic diversification;
- Hertfordshire, at locations (other than those noted above) where this would support strong, continued growth of mature and emerging clusters and sectors, or support regeneration of the Lee Valley; and
- Other key centres of development change, including Chelmsford, to meet needs identified in Local Development Documents.'

The 2007 Roger Tym study⁵ examined the approaches taken to the identification of strategic employment sites within ELRs across the region. It concluded that a variety of approaches have been taken, that some ELRs have identified strategic sites while others have not; and those that have identified strategic sites have defined them in different ways while in some cases authorities have not included a definition. This picture remains true today; it is acknowledged however, that some of the ELRs were completed prior to the publication of the final RSS. Appendix A summarises the approach taken in each completed ELR within the region with regards to strategic employment sites.

This apparent complexity over the exact definition of a strategic employment site is not confined to the East of England. A review of RSSs for the other English regions reveals a wide disparity in the approach to discussing and identifying strategic employment sites (Table 2.1). In summary, most of the RSS provide very little detail on how a strategic employment site should be defined. The main exception is the West Midlands, which identified a detailed hierarchy of sites and clear definitions (Table 2.2). Likewise a review of RES around the country revealed that most strategies did not discuss or identify strategic employment sites; the only exception being the North West which identified three tiers of employment sites (Table 2.3). Two of the RSS identify specific sites, i.e. the North East of England Plan with 8 (no.) 'key employment locations' and the London Plan, with 61 'preferred industrial locations' and 'industrial business parks'. The North East RES refers to 'employment sites of importance (8 no.) as part of case study for a development programme for a specific area – not all of these locations are the same as those identified in the RSS and the RES does not refer to 'key employment locations' per se.

⁵ Roger Tym & Partners (2007) East of England Employment Land Reviews and Guidance

Table 2.1 Regional Spatial Strategies – Approach to Strategic Employment Sites

Regional Spatial Strategy	Approach to Strategic Employment Sites
East	<ul style="list-style-type: none"> • Known as ‘Strategic Employment Sites’ • No definition provided • Required to meet the qualitative and quantitative needs of businesses including those of the region’s growth sectors and clusters • Identifies strategic locations where sites should be provided • No specific sites identified
South West	<ul style="list-style-type: none"> • Known as ‘Strategic sites’ • Not included in RSS Glossary • Strategic role is to be defined in terms of location and potential users’ requirements. • Acknowledges that strategic sites will be of different sizes, serve different employment uses and provide different numbers of jobs in different parts of the region. • New sites are to be safeguarded to meet future need • No specific sites identified.
South East	<ul style="list-style-type: none"> • Known as ‘Strategic Employment Land’ • Required to provide for the future needs businesses including qualitative needs in sectors showing growth potential for that part of a region • To be focused at locations identified in the sub-regional strategy, or more generally at the regional hubs or gateways • To be allocated or safeguarded in the relevant LDD • No specific sites identified.
London	<ul style="list-style-type: none"> • References to ‘Strategic Employment Locations’, to be identified in sub-regional frameworks but no definition provided. • Also references ‘Strategic Industrial Locations’ which are intended to ensure that London provides sufficient quality sites, in appropriate locations, to meet the needs of the general business, industrial, warehousing, waste management and some utilities and transport sectors. • Strategic Industrial Locations comprise Preferred Industrial Locations (PIL) and Industrial Business Parks (IBP). • IBPs are for businesses requiring a high quality environment; and PILs for businesses with less demanding requirements (including some in the environmental industry sector, for example) • Forty five PILs, fourteen IBPs and two sites, which partly fall into both categories are identified.
West Midlands	<ul style="list-style-type: none"> • Identifies a hierarchy of sites: <ul style="list-style-type: none"> ○ First tier sites of regional significance – known as ‘Regional Investment Sites’, ‘Major Investment Sites’ and ‘Regional Logistics Sites’ ○ Second tier sites of local significance – known as ‘Sub-regional Employment Sites’, ‘Good Quality Employment Sites’ and ‘Other Employment Sites’. • Notes that regionally and sub-regionally significant strategic sites will have cross-boundary implications. • See Table 2.3 for more detail • No specific sites identified
East Midlands	<ul style="list-style-type: none"> • No general discussion or policy for strategic employment sites • Regional priorities for employment land include meeting the needs of the market, priority sectors and potential investors • Contains a policy to encourage partnership working to bring forward ‘strategic distribution sites’,

within identified broad locations. Sites to be defined and prioritised based on the following criteria:

- Served by rail freight and operate as inter-modal terminals (good rail access and to the highway network)
 - Suitable configuration to meet operational needs
 - A need for such facilities due to demand from the logistics industry
 - Location which allows 24 hour operations
 - Minimising environmental and community impact
 - Good access to labour.
 - No specific sites identified
- North West
- Known as 'Locations for Regionally Significant Economic Development'
 - To be located close to sustainable transport nodes within urban areas
 - Sites should be:
 - Capable of development within the plan period
 - Highly accessible, especially by public transport services, walking and cycling
 - Well related to areas of high worklessness and/ or areas of regeneration
 - Well related to neighbouring uses
 - Sites should not be:
 - Used for development which could equally be accommodated elsewhere
 - Developed in a piecemeal manner
 - Site criteria for regionally significant developments in specific sectors identified:
 - Office development: - focus on regional centres and towns/ cities;
 - Knowledge based services – clustered close to universities, major hospitals or other research establishments;
 - Knowledge based manufacturing – well connected to these facilities by transport and ICT links
 - Logistics and high-volume manufacturing – well connected to the primary freight transport networks.
 - No specific sites identified
- Yorkshire and the Humber
- No specific discussion on strategic employment sites
 - The safeguarding and delivery of 'strategic employment sites' is identified as a key outcome for a general policy on safeguarding employment land
 - No specific sites identified
- North East
- Known as 'Key Employment Locations'
 - Term defined in RSS Glossary as 'those locations that the RSS identifies as critical to delivering accelerated growth in the regional economy.'
 - To be developed with particular strategic function and located within city-regions and within or adjacent to conurbations.
 - Promotes high levels of sustainability on Key Employment Locations
 - Eight individual sites are identified as Key Employment Locations and a brief description of size and economic focus provided

Sources: Government Office for the East of England (2008) East of England Plan; South West Regional Assembly (2006) The Draft Regional Spatial Strategy for the South West 2006 – 2026; Government Office for the South East (2009) The South East Plan; The London Mayor (2008) The London Plan - Spatial Development Strategy for

Greater London, Consolidated with Alterations since 2004; Government Office for the West Midlands (2008) Regional Spatial Strategy - for the West Midlands; Government Office for the East Midlands (2009) East Midlands Regional Plan; Government Office for the North West (2008) North West of England Plan, Regional Spatial Strategy to 2021; Government Office for Yorkshire and The Humber (2008) The Yorkshire and Humber Plan - Regional Spatial Strategy to 2026; Government Office for the North East (2008) The North East of England Plan - Regional Spatial Strategy to 2021

Table 2.2 West Midlands Hierarchy of Employment Sites

Site	Definition / Typical Characteristics
Premium Employment Sites	<ul style="list-style-type: none"> • Sustainably located, high quality peripheral employment land intended for inward investment and to allow for the expansion of existing firms with particular requirements
Regional Investment Site	<ul style="list-style-type: none"> • Purpose to support diversification and modernisation of economy; and development of cluster priorities • High quality sites • 20-50 ha • Attractive to national and international investors • Served or capable of being served by multi modal transport facilities and broadband IT infrastructure • Well related to motorway and trunk road network • Located within, or close to, the areas of greatest need • Accessible to effective education and training opportunities
Major Investment Site	<ul style="list-style-type: none"> • Purpose to meet the need for accommodating very large scale investment by single users with an international choice of location to help diversity and restructure the regional economy • High quality sites • 50 ha • Served or capable of being served by multi modal transport facilities and broadband IT infrastructure • Well related to motorway and trunk road network but avoiding sites immediately adjacent to motorway junctions • Located in areas close to a large pool of labour with employment needs • Accessible to effective education and training opportunities
Regional Logistics Site	<ul style="list-style-type: none"> • Purpose to provide opportunities for the concentrated development of warehousing and distribution uses • 50ha or more • Good quality access to the regional rail and highway networks and public transport links, or capable of having such links provided • Served or capable of being served by multi modal transport facilities and broadband IT infrastructure • Easy access to appropriate labour supply and education and training opportunities • Aim to minimise compromise to the local environment
Sub-regional Employment sites	<ul style="list-style-type: none"> • High quality attractive site • 10-20 ha in sustainable urban locations • Attractive to clients with an international/ national/ regional choice of location • Located on or have direct link to strategic highway network • Existing or proposed good public transport service
Good Quality Employment	<ul style="list-style-type: none"> • Good quality site

Site	Definition / Typical Characteristics
Site	<ul style="list-style-type: none"> • Suitable for locally based investment • More than 0.4ha • Some larger sites, which are some distance from the strategic highway network • Some sites within rural areas
Other Employment Sites	<ul style="list-style-type: none"> • Only of interest to local investors • Very small (less than 0.4ha) or only suitable for marginal or bad neighbour activities • Small sites within rural areas.

Source: Government Office for the West Midlands (2008) Regional Spatial Strategy - for the West Midlands

Table 2.3 Regional Economic Strategies – Approach to Strategic Employment Sites

Regional Economic Strategy	Approach to Strategic Employment Sites
East	<ul style="list-style-type: none"> • No references to Strategic Employment Sites
South West	<ul style="list-style-type: none"> • No references to Strategic Employment Sites
South East	<ul style="list-style-type: none"> • Only one references to Strategic Employment Sites in relation to providing sufficient employment land in one sub area of the South East. • No definition or Strategic Employment Site • No specific sites identified, although regionally important locations and areas referenced
London	<ul style="list-style-type: none"> • References the strategic industrial sites and strategic employment areas in the London Plan • Glossary defines Strategic Employment Locations (SELs) as: These comprise Preferred Industrial Locations, Industrial Business Parks and Science Parks and exist to ensure that London provides sufficient quality sites, in appropriate locations, to meet the needs of the general business, industrial and warehousing sectors.
West Midlands	<ul style="list-style-type: none"> • No specific references to Strategic Employment Sites • Only an identified priority to ensure an appropriate supply of employment land and premises which accords with the region's economic, environmental and spatial priorities as well as meeting the needs of business and communities
East Midlands	<ul style="list-style-type: none"> • No specific references to Strategic Employment Sites • Identified priority action to ensure there is an appropriate supply and range of quality employment sites, and for a range of different types of accommodation
North West	<ul style="list-style-type: none"> • Delivery of high quality employment sites seen as a priority for sustainable growth • The strategy states an adequate portfolio of regional and sub-regional employment sites will be needed to cater for indigenous growth and inward investment • Three tiers of sites identified: <ul style="list-style-type: none"> ○ Strategic Regional Sites - regional investment sites, knowledge nuclei, or intermodal freight terminals. These sites provide a portfolio of opportunities to support knowledge-based growth, key sectors, sustainable freight distribution and economic restructuring. ○ Reserve sites for major investment that would not otherwise take place in the Northwest in: Manufacturing, Knowledge based industry, corporate headquarters and R&D ○ Sub-regionally important employment sites. These will complement the existing regional sites to generate employment growth, especially where they are accessible to areas of worklessness
Yorkshire and	<ul style="list-style-type: none"> • No references to the general provision of employment sites or Strategic Employment Sites

Regional Economic Strategy Approach to Strategic Employment Sites

the Humber

- North East
- Employment Sites of Importance identified within a sub area as a case study example.
 - General references to requirements for employment sites, premises and supporting research facilities to meet business needs.

Source: SWRDA (2006) Regional Economic Strategy for South West England 2006 - 2015; SEEDA (2006) The Regional Economic Strategy 2006 – 2016, A Framework for Sustainable Prosperity; LDA (2005) Sustaining Success – Developing London's Economy, Economic Development Strategy; Advantage West Midlands (2006) Connecting to Success – West Midlands Economic Strategy; EMDA (2006) A Flourishing Region – Regional Economic Strategy for East Midlands 2006 -2020; NWDA (2006) North West Regional Economic Strategy; Yorkshire Forward (2006) The Regional Economic Strategy for Yorkshire & Humber 2006-2015; One North East (2006) Leading the Way, Regional Economic Strategy 2006- 2016

2.3 Definition

As the review of existing definitions has shown, a precise definition of a strategic employment site is an elusive concept. At its simplest a strategic employment site could be defined as one, which meets strategic objectives. Previous definitions of strategic employment sites have tended to use size and significance in terms of sectoral growth prospects. However, it is proposed that a broader and more comprehensive definition, (i.e more than just size or sectoral growth,) is adopted to identify strategic sites in the future.

The following 'definition' (and subsequent assessment of potential strategic employment sites) has been based on: analysis of approaches taken elsewhere to define strategic employment sites; the policy framework; and comments provided by the steering group, strategic planning authorities and attendees at the market workshop. The proposed definition was 'tested' with strategic planning authorities and the workshop attendees, who were in broad agreement.

Five key themes, each with a number of individual criteria frame the definition of strategic employment sites:

- Provision of future capacity
- Meet regional objectives
- Scope, scale and influence
- Vision and focus
- Economic drivers
- Transport and planning policy compliance

Each of these themes is discussed in term in the following sections. The approach taken to apply this definition to the long list of potential strategic employment sites, and the outcomes of this exercise, are described in Chapter 3.

2.3.1 Provision of Future Capacity

The purpose of designating strategic regional sites is to identify future capacity for employment growth within the region. Thus the designation should only be applied to:

- Existing sites with redevelopment or expansion potential; or
- New sites.

Sites should be capable of delivery within the plan period, i.e. 2031.

Such a designation would not apply to an existing established site, which is a significant source of employment and might fulfil some of the other criteria for strategic employment

sites, without capacity for growth, although this role could change in the future. This is not to say that these sites are not important but rather to acknowledge that at the current time (and the foreseeable future) that such a site is unlikely to be available to accommodate the future growth of the region. Should however, part of the site be identified for redevelopment then the designation should be reconsidered.

2.3.2 Meeting Regional Objectives

In addition to this basic purpose of providing future capacity, strategic employment sites should contribute to the wider regional objectives of jobs growth, providing a choice of quality sites and supporting the growth of clusters.

In order to fulfil these purposes, a strategic employment site may be defined by its ability to meet a range of criteria, which are set out below. A site would not necessarily need to fulfil all criteria in order to be designated a strategic employment site, however, some of the criteria are considered relatively more important and would be reflected in the prioritisation of a site within the proposed strategic employment site hierarchy, which is discussed further below.

2.3.2.1 Scope, Scale and Influence

One purpose of the strategic employment sites is to support economic growth for the region. Thus they should be significant sites capable of attracting national and international players, and they should be attractive to highly skilled individuals, who would be willing to move or commute to the area in order to work there.

Sites should be of regional/inter-regional/ or national significance

Although local employment sites undoubtedly have an important role to play in the regional economy, at a strategic level those sites, which have the greatest capacity to raise the profile of the region and therefore offer the greatest potential to increase the economic growth and productivity of the region or even the nation as a whole, are of more significance. This is considered key to achieving the proposed future growth of the region, in line with current RSS Policy E1.

Sites should be capable of providing sufficient employment to support sub-regional scale labour catchments

A strategic employment site is likely to attract employees from more than a local labour market catchment due to the scale of employment offered and the likely nature of the activities operating on the site which are expected to be specialised and thus require particular skill sets. A business required specialised employees is far more likely to attract employees from a sub-regional catchment area than a more local and general employment area, where employees do not require particularly high skill levels.

Sites should accommodate uses that serve regional or national markets

Given that strategic employment sites are of more than local importance, the businesses accommodated on the site should serve a more than local market. This may be defined in terms of function, i.e. command and control operations, such as international or national head offices or regional headquarters, or in terms of market share, where there is a more than local market for a specialised product.

2.3.2.2 Vision and Focus

A strategic employment site should be a showcase for the region. In order to achieve this purpose, it is necessary that a site has a clearly articulated vision and focus, which is understood by regional, national and international markets and investors.

Sites should have a clear identity/brand and a clear vision of their future role

Strategic employment sites should provide a portfolio of attractive flagship opportunities for future indigenous growth or inward investment for the region, particularly for the key sectors identified in the RSS and RES. In order for a site to compete in a global market for investment, it must have a brand or identity that is capable of international renown, such as

that achieved by the Cambridge science parks or the Newmarket race horse cluster. One essential ingredient to achieving a clear identity is a clear vision for the future role of the site. Thus, whether a site intends to be a R&D location or a renewable energy cluster, it is important that it has a long term vision to achieve this objective and that incompatible uses are resisted within the site. At the market workshop, it was emphasised that strong and consistent management of a site has a key role to play to achieve this aspiration.

Sites should have a clear office, manufacturing, research or distribution/logistics employment focus

A strategic employment site should have a single employment foci, it should not be a general mixed use employment area. Thus a high level objective for such a site could be; for example, to encourage the development of knowledge based activity, especially close to universities and other research clusters; or to great a distribution hub, which serves the region or a wider area.

Sites should accommodate single large scale users or multiple users, which fit with the overall strategy

As part of developing a coherent vision and focus, a strategic employment site will only accommodate businesses, which contribute to the overall strategy. This could be interpreted as a single user for the whole site, such as on GlaxoSmithKline site in Harlow, or multiple users involved in the same sector, such as at Adastral Park or Norwich Research Park. There may be other uses accommodate on site, however, these would be ancillary to the main functions and will cater for employee needs. Typical ancillary uses would include food & drink outlets, crèches, conference centres and small scale leisure, such as a gym. Ancillary users would not typically include hotels, large scale retailing or larger scale commercial leisure, such as bowling alley or cinema.

2.3.2.3 Economic Drivers

One further purpose for identifying strategic employment sites is to address the need for new development associated with growth and restructuring. Thus these sites should have the potential to act as economic drivers of change for the region. Supporting existing and emerging clusters is an important role for such sites.

Sites should accommodate leading edge sectors

The RSS identifies a number of key inter-regional and intra-regional clusters and sectors for support (Policy E4). Other identified key sectors include: food, automotive, construction and built environment, transport gateways, environmental goods and services and renewable energy. The RES also acknowledges the key clusters in the East of England and identifies strengthening clusters around leading private sector R&D companies and research intensive universities as a priority for realising the value of innovation in the region. The RES also emphasises the need to focus on sectors and clusters with existing or potential international advantage and the importance of leading innovation infrastructure in achieving this aim, including 'third generation science parks'⁶ The future prospects of these clusters and key sectors and implied demand for strategic employment sites is explored in Section 5.

RSS Policy E4

- 'The life-science regional super-cluster with concentrations in the Cambridge sub-region, Hertfordshire, Cranfield and Norwich;
- The energy cluster on the Norfolk/ Suffolk coast;
- The environmental technologies cluster stretching from Essex to Cambridgeshire, with particular focus on Peterborough;
- The motor sports cluster with a focal point at Hethel in Norfolk linking to Cranfield;
- The multimedia cluster from London to Hertfordshire and in Norfolk;

⁶ Also known as 'next generation science parks'

- The ICT cluster in the Cambridge area; and
- The ICT/ telecommunications cluster around Ipswich.'

Sites should accommodate uses that add to the 'economic base' of the region and are clear economic drivers.

A strategic employment site must support economic growth or economic restructuring for existing and new economic activity across the region. Sites which accommodate only local population or market orientated services should be excluded. One of the key questions, for identifying strategic employment sites, relates to where it is strategically important to deliver significant employment growth. Should this be at identified growth locations, such as Peterborough and Harlow? Further, is there a need for strategic employment sites within these locations?

2.3.2.4 Transport and Planning Policy Compliancy

One of the purposes for designating strategic employment sites is to ensure that they are prioritised in terms of deliverability and therefore a potential focus for intervention. They provide a focus for intervention, thus maximising the effectiveness of a likely limited pool of funding and increasing the likelihood of deliverability. This is particularly key in relation to infrastructure, which may require significant investment. If sites are to be prioritised, it is necessary, for example, that identified sites are compliant with planning and transport policy in order to be eligible for support and in particular funding.

Sites should offer high levels of accessibility by public and private transport and be consistent with transport policy

Although some sectors prefer town centre sites, for example media and financial services, it is assumed that the majority of strategic employment sites are likely to be within wider employment areas or business parks within or adjacent to the urban area rather than in the town centre per se. In some circumstances, it is possible that strategic employment locations may be physically more distant from the urban area due to a specialised activity, for example airport or food hub, or because the activity is a perceived or actual bad neighbour use, such as waste facilities. Given that strategic employment sites are likely to generate a significant number of jobs and the potential high levels of freight traffic associated with logistic sites, for example, it would generally be desirable that sites are highly accessible. There may be exception to this 'rule', for example food hub sites may be located within rural areas.

High levels of accessibility is defined as on or close to a motorway or A-road network and served by, or have the potential to be served by, good quality public transport, which given the relatively paucity of the rail network in terms of overall distribution within the East of England, is likely to be bus services. In general, a strategic employment site must be in conformity with transport policy. .

A strategic employment site use should be consistent with current and emerging planning policy

One of the most important functions of designating strategic employment sites is to ensure that they are protected for intended uses. To achieve this they must be supported through the planning system, including in development plans and local transport plans. Thus, if a site is to be designated a strategic employment site then it must implicitly be consistent with current and emerging planning policy.

2.4 Hierarchy of Strategic Employment Sites

A hierarchy of strategic employment sites is proposed for the East of England as follows:

- Regional strategic sites,
- Regional gateway and logistics sites, and

- Sub regional strategic sites.

All sites would be subject to regular review, so that new sites could be added and sites which failed to realise their ambitions over a sustained period could also be re-designated. Options for future reviews are presented in Chapters 6 and 7.

Regional Strategic Sites

The general term 'regional strategic site' is likely to be used in future to describe a short list of key employment sites in the region, the delivery of which will be critical to the effective implementation of the RES and the RSS, in particular supporting policies E2, E3 and E4. In terms of business development, the sites are likely to be or be capable of supporting cluster development, business incubation and supporting university spin-out, in addition to providing high quality locations for both indigenous and inward investment.

Regional strategic sites should have – or have the potential to develop – a very clear vision for their future role on terms of providing space for specific or leading edge sectors or clusters that offer potential to meet RES ambitions. These sectors will service national or international areas and be capable of developing a strong reputation in these markets. In this context there is a clear distinction between general business parks and industrial estates and regionally strategic sites. By having a clear vision, regional strategic sites are intended to develop the kinds of World Class reputation that is already apparent from the most successful sites in the region, such as the Cambridge science parks. They would also be designed to overcome a tendency for sites to accommodate all development that is available, resulting in a rather diverse range of unconnected uses. The regional strategic sites are also intended to be long term development options, capable of development over 20 years or more. They are also sites which need careful management, most particularly to ensure that they develop as leading edge 'brands' which are synonymous with leading edge success. This means taking a long term perspective and avoiding incompatible uses and poorer quality uses that undermine this brand or reputation.

The key characteristics of regional strategic sites are:

- High quality sites, which are attractive to national and international investors;
- Have good road and public transport accessibility;
- A clear identity/ brand and future vision for the site;
- Should accommodate development, which could not equally be accommodated elsewhere; and
- Support specific sectoral needs, such as knowledge based services clustered close to universities, major hospitals or other research establishments. .

Regional Gateway and Logistics Sites

The term 'regional gateway and logistics site' would apply to airports, ports and logistics sites. These sites must contain inter-modal freight facilities and terminals to encourage sustainable passenger and freight distribution; and serve more than a local market.

The key characteristics of regional gateway and logistics sites are:

- Served by rail and operate as inter-modal terminals;
- Have good road and rail access;
- Meet a strategic demand for passenger travel or distribution; and
- Provide an opportunity to accommodate users associated with the terminal, which require physical proximity.

Sub Regional Strategic Sites

Sub regional strategic sites would tend to be larger sites however they would have a more general focus than would be expected on regional strategic sites. The differences between

regional and sub regional strategic sites may in some circumstances be relatively marginal; and in fact, a cluster of sub-regional strategic sites may cumulatively be of regional strategic importance.

Sub regional strategic sites would typically be highly accessible sites and those that meet RSS/ RES objectives such as regeneration or skills development or the creation of sustainable communities by supplying sufficient quality employment alongside new or existing residential areas. They may have strong brands and reputations, but these brands and reputations would be typically linked more to the location or place and form part of a range of employment land offer. They would also accommodate more locally focused users. They are differentiated from local sites in terms of scale and the attraction of sub-regional functions as well as offering good strategic access. The design and layout of these sites and they type of premises in existence or likely to be developed should provide an attractive and competitive environment for higher order modern employment sectors.

The key characteristics of sub regional strategic sites are:

- Good quality site, which are attractive to businesses with sub-regional foci;
- More likely to offer general employment space rather than be sector specific;
- Have good road and public transport accessibility; and
- Support wider RSS/ RES objectives, such as regeneration or creation of sustainable communities.

2.5 Local Employment Sites

The definition of what constitutes a strategic employment site will vary significantly depending on context. Thus for a particular local authority area, a site may be of strategic importance, although would not be considered of strategic importance in the wider regional field. For the purpose of this study, these locally significant sites will be termed 'local employment sites'. However, it is acknowledged that the quality, scope and size of these sites could vary widely and it may be possible to identify a hierarchy of sites within this category.

It is probable that strategic employment sites will account for less than a quarter of the total requirement in the East of England. In this context, the importance of local employment sites should not be underestimated, and they have a key role to play in providing an appropriate portfolio of sites to meet the needs of all businesses. A point that was emphasised at the market workshop.

ELRs are the key mechanism through which the need for local employment sites will be examined and their locations identified. The results of which, should be reflected in Local Development Documents. This key role of ELRs is clearly acknowledged in the RSS (Policies E2, E3 and E4) and there is both regional and national guidance and good practice advice for conducting such exercises.

2.6 Take Up of Strategic Sites

The take up of strategic employment sites in the past could shed light on likely future demand. This approach forms an important part of the Employment Land Review process across planning authorities. However, there are no consistent statistical sources for take up of strategic employment sites. It is likely that this relates, in part, to the intangible nature of the definition of strategic employment sites.

This accepted, the take up of strategic employment sites is not necessarily different to the take up of all employment land – it is still principally driven by market demand and the viability of development. Take up rates may however be significantly influenced by the overall vision for a strategic site.

By focusing on specific areas of activity (for example high value added manufacturing or bio-technology) strategic employment sites support the development of symbiotic relationships between actors on the site, and links to related local activities. In focusing on complementary activities strategic sites may turn away enquiries from unrelated activities – slowing their take up. For example, a park with a vision centred around biotechnology may be in an attractive location for a large retailer looking to serve a wide area. A general employment area might welcome this development, but as it does not fit with the vision, a strategic site would turn it away.

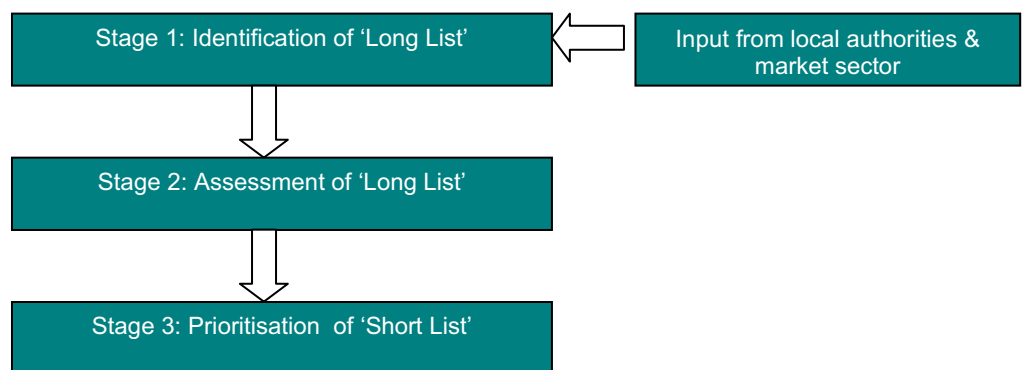
Sites with visions that are particularly aspirational, may be especially slow to develop. This process may reduce the financial viability of strategic site. These effects do not operate on general employment sites, which may therefore face more rapid take up rates. Contrary to this, once a critical mass is achieved on a strategic site, the vision may actually accelerate take up.

3 Assessment and Prioritisation of Sites

3.1 Approach

The overall approach to create a prioritised short list of strategic employment sites is shown in Figure 3.1 and is described in more detail in the following sections.

Figure 3.1 Overall Approach



Stage 1: Identification of the 'Long List'

An initial 'long list' of potential strategic employment sites was created based on information available in the RSS and RES (Appendix C) as well as the consultants' knowledge. This initial list was circulated to the County and Unitary Authorities in the region for comment. Authorities were provided with the criteria set out in Section 2.3, and asked to edit the initial list as considered appropriate, i.e. both proposals for deletion and nomination of sites. Subsequently a revised list of sites was prepared, which was then shared with attendees at a market workshop for comment and further suggestions. On the basis of both these consultation exercises, a 'long list' of potential sites was established.

Pro forma, containing basic information for each of these sites, were prepared and these can be found in the Annex Report. Each identified potential site was named and details of its location, size, status, primary economic use, existing or proposed occupants, present site and surrounding uses, and main access were noted. These details were established through consultation with authorities, market workshop attendees and information available in relevant data sources, such as employment land reviews, planning applications or masterplans.

Stage 2: Assessment of 'Long List'

On the basis of the information in the pro forma, all of the sites were the independently assessed by the Consultant team against the strategic employment sites criteria to create a 'short list' of strategic employment sites.

As set out in Section 2.3, the purpose of designating strategic employment sites is to identify future capacity for employment growth within the region. Thus, the designation should only be applied to existing sites with redevelopment or expansion potential, or new sites. Therefore the first step of assessment was to identify those sites, which are currently important employment locations but do not at present offer capacity for growth. Where a site was found to have no current or anticipated growth capacity on the basis of information provided, it was discounted from further assessment.

The second step of the assessment was to assess the site against the other defining criteria with regards to meeting regional objectives, i.e. scope, scale and influence; vision and focus; economic drivers; and transport and policy compliance. Those sites, which met

regional objectives, were included on the 'short list'. Where a site was judged not to meet regional objectives, it was classified as a local employment site.

Stage 3: Prioritisation of the 'Short List'

The final task was to prioritise the 'short list' according to the defined hierarchy set out in section 2.4.

3.2 The 'Long List' of Sites

One hundred and forty four potential strategic employment sites were identified - the 'long list' (Appendix C4), which are distributed across the region:

- Bedfordshire and Luton – 25 potential sites;
- Cambridgeshire and Peterborough – 24 potential sites;
- Essex, Southend-on-Sea and Thurrock – 30 potential sites;
- Hertfordshire – 17 potential sites;
- Norfolk – 19 potential sites; and
- Suffolk – 29 potential sites.

3.3 Identification of Sites with Future Capacity

Based on the pro forma information, (provided by local authorities, the market sector and desk top research), fifteen sites within the list of proposed strategic employment sites were identified as fully or nearly fully occupied, with no known plans for expansion or redevelopment (Table 3.1). It should be noted that many of these sites provide accommodation for important (growth) sectors for the region. As suggested in Section 2.3, if potential for growth or redevelopment is identified at a later date, re-designation should be considered.

Table 3.1 Significant Local and Sub Regional Employment Locations with No Identified or Very Limited Scope for Growth

Capability Green, Luton	EADS Astrium, Stevenage
Marsh Leys Regional Distribution Site, Kempston	MBDA, Stevenage
Wyboston Lakes, Wyboston	University of Hertfordshire, Hatfield
Genome Campus, Hinxton	British Sugar Site, King's Lynn
Colchester Institute, Colchester	DanceEast, Cranfield Mill, Ipswich
Grays Town Centre Learning Campus and Grays Business Community Centre, Grays	Suffolk New College, Ipswich
Borehamwood & Elstree Studios, Borehamwood and Elstree	Trinity Park, Ipswich
Woodside Industrial Park, Dunstable	

There will be many other sites across the region that could be similarly categorised and should be afforded appropriate protection as current key employment sites. Included within this group are, for example, the RAF/ USAF airbases. It is important for both Local Development Frameworks and the RSS to recognise the bases' and other MOD establishments' importance and contribution to the regional economy. However, until identified by the MOD as surplus to requirements, their inclusion in a list of strategic employment sites (i.e. development opportunities) would be inappropriate.

A suggestion was made that the horse racing and associated industries in the Newmarket area should be included within the list of strategic employment sites. However, given the absence of a specific site or sites to assess this location was excluded from the

assessment. Nevertheless as important economic cluster for the region, this location should be afforded appropriate protection and support.

3.4 Identification of Local v Strategic Employment Sites

The sites with potential future capacity (no. 129) were appraised against the definition (Section 2.3) to identify those sites, which could be considered strategic employment sites and those which were considered local employment sites.

- Fifty six sites were classified as strategic employment sites. These are prioritised according the hierarchy of strategic employment sites, (Section 2.4), in the next section.
- Seventy three sites were classified as local employment sites (Table 3.2). A summary of the reasons for the designation can be found in Appendix D.

3.5 Prioritisation of Sites

The 56 strategic employment sites (Table 3.3) have been classified as regional strategic sites, regional gateway or logistics sites or sub regional sites, based on the hierarchy established in Section 2.4. A summary of the reasons for the designations can be found in Appendix D. The sites have been prioritised as follows:

- Eleven sites have been designated as regional strategic sites.
- Fifteen sites have been designated as regional gateway and logistics sites,
- Thirty have been designated as sub regional sites.

Table 3.2 Local Employment Sites

Bedfordshire & Luton	Cambridgeshire & Peterborough	Essex, Southend & Thurrock
<p>Arlesey/Stotfold/Fairfield Park Business Park Cardington Cross, Cardington Cardington Sheds, Cardington Center Parcs, Millbrook Century Park, Luton East of Leighton Buzzard, Leighton Buzzard Land East Stratton, Biggleswade Napier Park, Luton North of Luton, Luton Rookery South, Marsden Vale Thurleigh Airfield, Thurleigh Wootton</p>	<p>Brookfield Farm, Huntingdon Great Stukeley Northern Fringe East, Cambridge South East Chatteris, Chatteris Wisbech Port / Mount Pleasant, Wisbech</p>	<p>East Colchester, Colchester Essex Regiment Way, Chelmsford Firstsite, Colchester Land NE Elsenham Maltings Lane, Witham North of Nortel, Harlow New Town North-west Braintree, off Panfield Lane, Braintree Proposed Sites in North-East Chelmsford Royal Opera House Production Campus & Creative National Skills Academy, Purfleet Skyline 120 Business Park, Braintree South of Country Park, Great Notley, Braintree Springfield Business Park, Chelmsford Stane Park, Colchester Stanway Strategic Employment Zone, Colchester Temple Farm, Chelmsford University of Essex Knowledge Gateway, Colchester</p>
Hertfordshire	Norfolk	Suffolk
<p>Area of Search 1: South west of St Albans, St Albans Area of Search 2: South east of St Albans, St Albans Area of Search 4: South of London Colney, London Colney East of Buncefield, Hemel Hempstead Former Radlett Aerodrome, Upper Clone Valley Lister Hospital, Stevenage</p>	<p>Beacon Business Park, Great Yarmouth Deal Ground, Norwich Fisons Way Extension, Thetford Gapton Hall Industrial Estate Extension, Great Yarmouth Hardwick Industrial Estate Extension, Kings Lynn Honingham Thorpe Farm, Colton Longwater, Costessey NORA, King's Lynn</p>	<p>Beach Industrial Estate, Lowestoft Brantham Site, Brantham Cranes site, Ipswich Eye Airfield Industrial Estate, Eye Gisleham Industrial Estate, Lowestoft Hanchet End Business Park, Haverhill Haverhill Business Park, Haverhill IP8 Scrivener Drive, Ipswich Ipswich Waterfront, Ipswich</p>

Roehyde, Hatfield Royston Road, Baldock	Snetterton Circuit & Heath, Eccles Thetford Enterprise Park, Thetford Thetford North, Thetford Utilities, Norwich Watton Airfield, Watton White House Farm, Saddlebow	Jaywick, Clacton-on-Sea Orion Business Park, Great Blakenham Ransomes Europark, Nacton Shepherds Grove Industrial Estate, Stanton/ Hepworth SnOasis, Great Blakenham South of Lake Lothing, Lowestoft University Campus Suffolk (West Suffolk Campus), Bury St Edmunds University Campus, Suffolk (Ipswich campus), Ipswich Wherstead site nr Orwell Bridge, Ipswich
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Table 3.3 **Prioritised Strategic Employment Sites**

County	Regional Strategic Sites	Regional Gateway and Logistics Sites	Sub Regional Sites
Bedfordshire & Luton	Butterfield Business Park, Great Marlings Cranfield University and Technology Park, Cranfield	Luton Airport, Luton Sundon Quarry, Luton	Colworth Science Park, Sharnbrook Millbrook Proving Ground, Millbrook NIRAH and Science Park, Marston Vale Priory Business Park and iLab, Bedford Wixams new settlement, Bedford
Cambridgeshire & Peterborough	Addenbrookes 2020 Vision, Cambridge Peterborough University, Peterborough Babraham Research Campus, Cambridge Granta Park, Cambridge Cambridge Science Park, Cambridge	Magna Park, Whittlesey	Alconbury Cambridge East, Cambridge East of St. Neots Gateway Peterborough and Great Haddon, Peterborough Hostmoore Commercial Park, March Huntingdon West / Hinchingsbrooke Park, Huntingdon Lancaster Way Business Park, Ely Northstowe, near Longstanton Red Brick Farm, Peterborough Redevelopment of the South Bank, Peterborough South West Wisbech / Weasenham Lane, Wisbech University North West Cambridge, Cambridge
Essex, Southend & Thurrock	A127 Enterprise Corridor, Basildon New Town & Southend	East of Pond Hall Farm, Ramsey, Harwich Harwich International Port, Bathside Bay Container Terminal, Harwich London Gateway Port Development, Thurrock London Southend Airport and its environs, Southend London Stansted Airport, Generation 1 expansion, Stansted London Stansted Airport, Generation 2	Cuckoo Farm, Colchester Chelmsford Business Park, Chelmsford Lakeside Basin, Thurrock South West Canvey, Charfleets extension and Northwick Road, Canvey Island

		expansion, Stansted Port of Tilbury, Tilbury	
Hertfordshire	Glaxosmithkline Cluster, Stevenage, Ware and Harlow		Gunnels Wood, Stevenage Knebworth Innovation Park, Stevenage Leavesden Studios, Leavesden Maylands, Hemel Hempstead
Norfolk	Norwich Research Park and extension, Colney	South Denes (East Port), South Denes	Broadland Business Park, Norwich Hethel Engineering Centre, Hethel
Suffolk	Adastral Park, Martlesham	Blofield Park, Felixstowe Christmasyard's Wood, Felixstowe Felixstowe South Reconfiguration, Felixstowe Innocence Farm, Trimley St Martin	Former British Sugar site Sproughton, Ipswich Lowestoft Power Park, Lowestoft Moreton Hall Industrial Estate/ Suffolk Business Park, Bury St Edmunds

4 RSS and RES Policy Objectives

This section considers the role of strategic employment sites and the identified portfolio in the context of supporting existing RSS and RES policies.

4.1 Meeting RSS Policies

The key policies to which strategic employment sites could make the greatest contribution have been identified as policies E1, E2, E3 and E4.

4.1.1 Policy E1: Jobs Growth

Policy E1 sets indicative jobs growth targets for the region for the period up to 2021. It is judged that the existing identified portfolio of strategic employment sites will help to contribute to the overall growth of the region. However, it is considered that direct job creation will be relatively modest compared to overall targets, given the relatively small contribution that strategic employment sites make in terms of the proportion of overall land requirements. It is possible that the further induced, indirect or catalytic jobs may be created through development on strategic employment sites that would further contribute to the overall growth of jobs in the region.

4.1.2 Policy E2: Provision of Land for Employment

This policy stresses the need for Local Development Documents (LDDs) to ensure an adequate range of sites/ premises to accommodate the full range of sectoral requirements, to meet growth targets and the needs of the local economy revealed by up-to-date ELRs. As already established, strategic employment sites have a role to play in ensuring the region has a good range of sites.

More than 85% of authorities in the region already have an ELR in place. As discussed in Section 2.2, not all ELRs discuss or identify strategic employment sites, although it is acknowledged that some of the ELRs were completed prior to the issue of the final RSS. Sixteen of the completed ELRs specifically identify strategic employment sites (Appendix C2). The distribution of these locally identified sites in relation to the outcomes of this study is discussed further in relation to Policy E3.

If the recommendations of this study are taken forward and the proposed hierarchy of sites adopted, there would be merit in updating some ELRs, in particular those that cover the locations identified in the current Policy E3 (or its update).

4.1.3 Policy E3: Strategic Employment Sites

This policy is based around the provision of strategic employment sites to meet the needs of businesses, to be provided, but not exclusively, at regionally strategic locations. Policy E3 again emphasises the role of LDDs in identifying strategic employment sites at the named strategic locations based on the outcomes of ELRs. The following analysis examines the short list of strategic employment sites identified in this study compared to the named strategic locations. The tables also record whether the site is identified in the relevant authority's ELR.

Bedford, Harlow, Stevenage, Hemel Hempstead and Luton

A portfolio of strategic employment sites have been identified in Bedford, Luton, Stevenage and their immediate environs. However, the identified future strategic employment sites capacity in Harlow and Hemel Hempstead is more constrained. The only potential site in Hemel Hempstead considered to be of more than local importance is Maylands, which is largely developed, while in Harlow it is the GlaxoSmithKline site. That said the (re-) development of these sites has the potential to contribute to the regeneration of these urban centres, a key aim for this area (Policy E3).

The contribution that all these sites can make towards ensuring growth in key sectors and clusters, a specific aspiration for this area in Policy E3, is discussed in Chapter 5.

Table 4.1 Bedford, Harlow, Stevenage, Hemel Hempstead and Luton Conurbation – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Bedford	Cranfield University and Technology Park, Cranfield	x
	<i>Colworth Science Park, Sharnbrook</i>	x
	<i>Priory Business Park and iLab, Bedford</i>	x
	<i>Millbrook Proving Ground, Millbrook</i>	x
	<i>NIRAH and Science Park, Marston Vale</i>	x
	<i>Wixams new settlement, Bedford</i>	x
Harlow	Glaxosmithkline, Harlow	x
Stevenage	Glaxosmithkline, Stevenage	x
	<i>Gunnels Wood, Stevenage</i>	x
	<i>Knebworth Innovation Park, Stevenage</i>	x
Hemel Hempstead	<i>Maylands, Hemel Hempstead</i>	x
Luton	Butterfield Business Park, Great Marlings	x
	<u>Luton Airport, Luton</u>	✓
	<u>Sundon Quarry, Luton</u>	x

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Thames Gateway – Basildon, Southend and Thurrock

Strategic employment sites have been identified at all of the specified locations within the Thames Gateway. Both Southend-on-Sea's and Basildon's future capacity is provided in the form of the potential to (re-)develop along the A127 Corridor; while the remaining capacity provides scope for growth around the key infrastructure hubs in the area, i.e. London Gateway Port, Tilbury Port and London Southend Airport. The identified sites would appear to support the overall strategies for these key centres, (RSS Policies E3, ETG2, ETG3 and ETG4), including: supporting the growth of the ports; regeneration and redevelopment of Lakeside Basin; the regeneration of Basildon and Southend; and supporting employment uses that would benefit from an airport location.

Table 4.2 Thames Gateway – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Basildon	A127 Enterprise Corridor, Basildon New Town	x
Southend-on-Sea	A127 Enterprise Corridor, Southend	x
	<u>London Southend Airport and its environs, Southend</u>	x
Thurrock Urban Area	<u>London Gateway Port Development, Thurrock</u>	x
	<u>Port of Tilbury, Tilbury</u>	x
	<i>Lakeside Basin, Thurrock</i>	x

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Cambridge Sub Region

A range of sub regional sites have been identified, as well as regional strategic sites. The latter offer additional growth capacity to further develop the world renown science parks at Babraham, Granta Park and Cambridge Science Park, and to develop the medical research cluster at Addenbrookes. Although four individual sites have been identified in Cambridge, it is recommended that these sites are grouped together and considered to collectively

provide future growth capacity for this centre of research and development; the key aspiration for this area in Policy E3.

Table 4.3 Cambridge Sub Region – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Cambridge Sub Region	Babraham Research Campus, Cambridge	x
	Granta Park, Cambridge	x
	Cambridge Science Park, Cambridge	x
	Addenbrookes 2020 Vision, Cambridge	✓
	<i>Alconbury</i>	x
	<i>Cambridge East, Cambridge</i>	✓
	<i>East of St. Neots</i>	x
	<i>Hostmoore Commercial Park, March</i>	x
	<i>Huntingdon West / Hinchingsbrooke Park, Huntingdon</i>	x
	<i>Lancaster Way Business Park, Ely</i>	x
	<i>Northstowe, near Longstanton</i>	✓
	<i>South West Wisbech / Weasenham Lane, Wisbech</i>	x
<i>University North West Cambridge, Cambridge</i>	✓	

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Peterborough

The planned university campus, specialising in environmental technologies would help to support the existing cluster in Peterborough. The priority will thus be to ensure the delivery of the first phase of the project, i.e. the four college sites; and to identify an appropriate site for the proposed university campus. The proposed regional freight centre at Magna Park would also offer wider job opportunities. Other more general employment sites, which offer the opportunity to achieve regeneration, create sustainable communities and potentially accommodate the desired expansion of the environmental technology cluster, have also been identified.

Table 4.4 Peterborough – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Peterborough	Peterborough University, Peterborough	x
	<u>Magna Park, Whittlesey</u>	x
	<i>Gateway Peterborough and Great Haddon, Peterborough</i>	✓
	<i>Red Brick Farm, Peterborough</i>	x
	<i>Redevelopment of the South Bank, Peterborough</i>	x

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Norwich

Three strategic employment sites have been identified at Norwich and in its immediate environs. The Norwich Research Park extension in particular, is likely to help achieve the aspiration set out in Policy E3 to support Norwich's role in bio-technology. No specific sites have been identified, which specifically support the regeneration of Norwich, the second aspiration for this area.

Table 4.5 Norwich – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Norwich	Norwich Research Park and extension, Colney <i>Broadland Business Park, Norwich</i> <i>Hethel Engineering Centre, Hethel</i>	✓ ✓ x

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Haven Gateway

Strategic employment sites have been identified at all of the specified locations within the Haven Gateway. This has includes potential to build on the identified ICT and port clusters, at Adastral Park and Felixstowe and Harwich Ports. The identified future strategic employment sites capacity in Colchester is relatively constrained compared to Ipswich, as no regionally strategic sites have been identified at the former location.

Table 4.6 Haven Gateway – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Colchester	<i>Cuckoo Farm, Colchester</i>	✓
Ipswich	Adastral Park, Martlesham <i>Former British Sugar site Sroughton, Ipswich</i>	✓ x
Harwich	<u>East of Pond Hall Farm, Ramsey, Harwich</u> <u>Harwich International Port, Bathside Bay Container Terminal, Harwich</u>	x ✓
Felixstowe	<u>Blofield Park, Felixstowe</u> <u>Christmasyard's Wood, Felixstowe</u> <u>Felixstowe South Reconfiguration, Felixstowe</u> <u>Innocence Farm, Trimley St Martin</u>	x x ✓ x

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Great Yarmouth and Lowestoft

Two strategic employment sites have been identified in this area, which would appear to meet the aspirations for this area of regeneration, economic diversification and supporting port expansion. Although the identified future strategic employment sites capacity in this area is relatively constrained compared to other regionally strategic locations, it is judged that this is appropriate given the relatively low jobs growth targets (Policy E1) for these areas compared to other locations.

Table 4.7 Great Yarmouth and Lowestoft – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Great Yarmouth	<u>South Denes (East Port), South Denes</u>	✓
Lowestoft	<i>Lowestoft Power Park, Lowestoft</i>	x

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Hertfordshire

In addition to the growth capacity identified at Stevenage and Hemel Hempstead, two further strategic employment sites have been identified in Hertfordshire. The first Glaxosmithkline at Ware may be considered to be part of an overall Glaxosmithkline 'cluster' within Hertfordshire and Essex, rather than treated as individual site. This site plus the second site at Leavesden, both provide capacity to support the continued growth of mature clusters or sectors, i.e. pharmaceuticals and the creative industries, one of the main Policy E3 aspirations for this area. No sites have been identified to support the other aspiration of supporting regeneration in the Lee Valley.

Table 4.8 Hertfordshire – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Hertfordshire	Glaxosmithkline, Ware <i>Leavesden Studios, Leavesden</i>	× ×

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Key Centres for Development and Change (KCDCs)

The other KCDCs not already addressed are: Bury St Edmunds, Chelmsford, Thetford and Welwyn Garden City and Hatfield. Two sub regional sites have been identified at the first two locations. No strategic employment sites have been identified at Thetford or Welwyn Garden City and Hatfield.

Table 4.9 Other Key Centres of Development and Change – Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
Bury St Edmunds	<i>Moreton Hall Industrial Estate/ Suffolk Business Park, Bury St Edmunds</i>	×
Chelmsford	<i>Chelmsford Business Park, Chelmsford</i>	×
Thetford	None	n/a
Welwyn Garden City and Hatfield	None	n/a

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Other Identified Sites

As stated in Policy E3, strategic employment sites will not necessarily exclusively found at regionally significant locations. In fact, this study has identified three strategic employment sites that fall outside of the identified areas.

Table 4.10 Other Identified Strategic Employment Sites

Regionally Strategic Locations	Prioritised Strategic Employment Sites	Identified as a Strategic Employment Site in ELR
n/a	<u>London Stansted Airport, Generation 1 expansion, Stansted</u> <u>London Stansted Airport, Generation 2 expansion, Stansted</u> <u>South West Canvey, Charfleets extension and Northwick Road, Canvey Island</u>	<p style="text-align: center;">✘</p> <p style="text-align: center;">✘</p> <p style="text-align: center;">✘</p>

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

Summary

The current identified portfolio of strategic employment sites (Table 3.3) provides future growth capacity in almost all of the identified locations in RSS Policy E3. However, in some regionally strategic locations, only sub-regional employment sites have been identified. It may be worth exploring whether in some of these locations, there is a case for identifying and promoting a regional strategic site. That said, it is not necessarily essential that each regionally strategic location has a regional strategic site, it may be that a portfolio of sub-regional sites or Regional Gateway or Logistics Sites as more appropriate in that location. This judgement should be made on a case by case basis depending on the specific economic characteristics of the area.

A couple of specific geographical ‘gaps’ have been identified; specifically at Thetford and Welwyn Garden City and Hatfield. If Policy E3 is retained, there is a need to re-examine the inclusion of these areas to determine if there is a still a need for strategic employment sites in these locations. If so, the priority will be to identify and accord protection to appropriate locations.

An aspiration for a number of the regionally strategic locations is to identify strategic employment sites to assist with the regeneration of the area. The identified portfolio of strategic employment sites does not seem to necessarily sit well with this aspiration. For example, the identified sites within Norwich do not seem to offer any significant regeneration potential. There are a couple of regeneration areas, such as the Lee Valley, where no strategic employment sites have been identified. It is arguable whether strategic employment sites will necessarily be the most appropriate choice for a regeneration area. As already discussed, strategic employment sites are by their very nature more difficult to deliver, particularly in relation to regional strategic sites, in terms of the likely need for a long lead in time or implementation period in order to deliver a site with a clear vision and economic focus. In a regeneration area, where there are already likely to be economic challenges, such a long term approach may not be attractive in terms of delivering demonstrable change. That said, there may be circumstances, where the promotion of a regional strategic site as a flagship project may be an attractive proposition, providing appropriate support can be realised. Again this judgement will need to be made on a case by case basis for individual locations.

4.1.4 Policy E4: Clusters

This policy is discussed in the following Chapter.

4.2 RES Policies

The RES does not contain any specific policies which are overtly about employment land provision or in particular, strategic employment sites. Nevertheless there are a number of aspirations within the RES, to which the identification and future development of strategic employment sites could contribute. Not least of all is the overall vision.

4.2.1 Vision

By 2031, the East of England will be:

- Internationally competitive with a global reputation for innovation and business growth;
- A region that harnesses and develops the talents and creativity of all;
- At the forefront of the low-carbon and resource-efficient economy.

And known for:

- Exceptional landscapes, vibrant places and quality of life
- Being a confident, outward-looking region with strong leadership and where communities actively shape their future.

A number of the key criteria for defining a strategic employment sites (as set out in Section 2.3), are its ability to be more than locally significant and to have a clear vision and economic focus that will make it more than locally recognisable. The identification, support and protection of the strategic employment sites portfolio could thus be a key element to help achieve the vision, in particular the aspiration to be internationally competitive.

4.2.2 Priorities

The RES sets out a number of priorities, which provide the framework for action to deliver the vision and growth aspirations for the region. The eight priorities to which strategic employment sites could make the greatest contribution have been identified and are discussed below.

- Enterprise Priority 2: Opportunities from international trade, investment and collaboration
- Enterprise Priority 3: Enabling high-growth businesses to realise their potential
- Innovation Priority 3: Strengthening clusters around leading private sector R&D companies and research-intensive universities
- Innovation Priority 4: Positioning the East of England and Greater South East as global innovation regions
- Resource Efficiency Priority 3: Increasing the share of environmental goods and services markets
- Economic Participation Priority 3: Increasing economic demand in areas with low economic activity rates
- Transport Priority 3: Increasing economic benefit to the East of England from major international gateways
- Spatial Economy Priority 3: Creating sustainable places for people and businesses.

Strategic employment sites are important in terms of:

- Providing capacity to encourage international investment and support indigenous growth (Enterprise Priorities 2 and 3). These are key criteria used in the definition and identification of strategic employment sites.
- Supporting the development of existing and emerging clusters by the provision of future growth capacity (Enterprise Priority 3). For example, the identified sites in Cambridge and Norwich, will help to support the existing R&D clusters (Innovation Priorities 3 and 4); while the identified sites in Peterborough, will help to support the emerging environmental technologies cluster (Resource Efficient Priority 3).
- Delivering regeneration and supporting economic diversification in areas of deprivation (Economic Participation Priority 3). For example, development of Eastport at Great Yarmouth and the Lowestoft Power Park will help to diversify these struggling coastal economies, while the development of Peterborough's Southbank, will help with the regeneration of the city centre.

- Creating sustainable communities by helping to ensure there is capacity to delivery employment growth to complement planned new residential communities, (Spatial Economy Priority 3), such as Northstowe, Wixams and Great Haddon.
- Encouraging the growth of transport gateways, i.e. ports and airports by the provision of strategic employment sites both at the gateways themselves and in the immediate area for supporting activities, which do not be located on the site but do require physical proximity. The current portfolio of strategic employment sites includes numerous sites that will help facilitate this growth in the East of England, such as London Southend Airport and Felixstowe South Reconfiguration.

4.2.3 Spatial Economic Planning

The RES identifies three spatial geographies in terms of delivering the various goals and priorities contained within the strategy: engines of growth; coastal settlements; and market towns and rural areas. In practice many of these geographies overlap with the regionally strategic locations already discussed in Section 4.1.3.

Table 4.11 compares the identified portfolio of strategic employment sites with the strategic ambitions, with a spatial dimension, for each of the spatial geographies. There is a good match for the majority of the strategic ambitions. Only those ambitions relating to creative/ cultural industries and financial/ businesses services do not have 'matched' strategic employment sites. As explored further within Sections 5, it is arguable that these sectors, and the creative industries in particular, tend to exploit small scale provision in a number of locations, rather than on a few larger sites.

Table 4.11 RSS Spatial Geography and the Distribution of Prioritised Strategic Employment Sites

RES Spatial Geography	Strategic Ambitions with a Spatial Dimension	Prioritised Strategic Employment Sites
Thames Gateway South Essex	<p>Develop London Gateway, including the Port of Tilbury</p> <p>Major reinvention of Lakeside Basin</p> <p>Develop environment technologies and services centre in Basildon and in Thurrock</p> <p>Support creative industries in Thurrock and Southend-on-Sea</p> <p>Realise the potential of London Southend Aripport</p>	<p>A127 Enterprise Corridor, Basildon New Town and Southend</p> <p><u>London Southend Airport and its environs, Southend</u></p> <p><u>London Gateway Port Development, Thurrock</u></p> <p><u>Port of Tilbury, Tilbury</u></p> <p><i>Lakeside Basin, Thurrock</i></p> <p><i>South West Canvey, Charfleets extension and Northwick Road, Canvey Island</i></p>
Greater Cambridge Sub Region	<p>Support the growth of Anglia Ruskin University</p> <p>Deliver new facilities at East Forum and Addenbrookes</p> <p>Ensure a long term supply of sites for R&D and commercial activity</p>	<p>Babraham Research Campus, Cambridge</p> <p>Granta Park, Cambridge</p> <p>Cambridge Science Park, Cambridge</p> <p>Addenbrookes 2020 Vision, Cambridge</p> <p><i>Alconbury</i></p> <p><i>Cambridge East, Cambridge</i></p> <p><i>East of St. Neots</i></p> <p><i>Hostmoore Commercial Park, March</i></p> <p><i>Huntingdon West / Hinchingsbrooke Park, Huntingdon</i></p> <p><i>Lancaster Way Business Park, Ely</i></p> <p><i>Northstowe, near Longstanton</i></p> <p><i>South West Wisbech / Weasenham Lane, Wisbech</i></p> <p><i>University North West Cambridge, Cambridge</i></p>
Greater Peterborough Sub-Region	<p>Provide a university presence in the city, with longer term development of an higher education campus</p> <p>Expand the environmental technology cluster including through provision of space</p> <p>Secured increased investment in logistics and advanced services</p>	<p>Peterborough University, Peterborough</p> <p><u>Magna Park, Whittlesey</u></p> <p><i>Gateway Peterborough and Great Haddon, Peterborough</i></p> <p><i>Red Brick Farm, Peterborough</i></p> <p><i>Redevelopment of the South Bank, Peterborough</i></p>

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

RES Spatial Geography	Strategic Ambitions with a Spatial Dimension	Prioritised Strategic Employment Sites
<p>Milton Keynes South Midlands Growth Area</p>	<p>Promote growth and innovation through physical development, such as Butterfield Park, Luton; Capability Green, Luton; and Priory Business Park and i-lab, Bedford.</p> <p>Develop a next generation science park at Colworth</p> <p>Realise the role of Cranfield University by further developing the Technology and Air Parks</p>	<p>Cranfield University and Technology Park, Cranfield <i>Colworth Science Park, Sharnbrook</i> <i>Priory Business Park and iLab, Bedford</i> <i>Millbrook Proving Ground, Millbrook</i> <i>NIRAH and Science Park, Marston Vale</i> <i>Wixams new settlement, Bedford</i> Butterfield Business Park, Great Marlings <u>Luton Airport, Luton</u> <u>Sundon Quarry, Luton</u></p>
<p>London Arc Sub-Region</p>	<p>Support the Key Centres for Development and Change</p>	<p>Glaxosmithkline Cluster, Harlow/ Stevenage/ Ware <i>Gunnels Wood, Stevenage</i> <i>Knebworth Innovation Park, Stevenage</i> <i>Leavesden Studios, Leavesden</i> <i>Maylands, Hemel Hempstead</i> <u>London Stansted Airport, Generation 1 expansion, Stansted</u> <u>London Stansted Airport, Generation 2 expansion, Stansted</u></p>
<p>Greater Norwich Sub-Region</p>	<p>Strengthen Norwich as a leading medium sized science city</p> <p>Enable the development of clusters at Norwich Research Park and Hethel</p> <p>Develop Norwich as a nationally important centre in financial and businesses services and creative industries</p>	<p>Norwich Research Park and extension, Colney <i>Broadland Business Park, Norwich</i> <i>Hethel Engineering Centre, Hethel</i></p>

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

RES Spatial Geography	Strategic Ambitions with a Spatial Dimension	Prioritised Strategic Employment Sites
Haven Gateway Sub-Region	<p>Develop a next generation science based business park at Martlesham</p> <p>Expansion of the international port functions of Haven Gateway including Felixstowe South and Bathside Bay</p> <p>Develop cultural infrastructure of national and regional significance</p> <p>Strengthen the University of Essex through the development of Colchester Research Park (University of Essex)</p>	<p><i>Cuckoo Farm, Colchester</i></p> <p><i>Adastral Park, Martlesham</i></p> <p><i>Former British Sugar site Sproughton, Ipswich</i></p> <p><u>East of Pond Hall Farm, Ramsey, Harwich</u></p> <p><u>Harwich International Port, Bathside Bay Container Terminal, Harwich</u></p> <p><u>Blofield Park, Felixstowe</u></p> <p><u>Christmasyard's Wood, Felixstowe</u></p> <p><u>Felixstowe South Reconfiguration, Felixstowe</u></p> <p><u>Innocence Farm, Trimley St Martin</u></p>
Coastal Renaissance	<p>Develop EastPort outer harbour</p> <p>Delivery major physical restructuring in the 1st East area</p>	<p><u>South Denes (East Port), South Denes</u></p> <p><i>Lowestoft Power Park, Lowestoft</i></p>
Market Towns and Rural Areas		<p><i>Moreton Hall Industrial Estate/ Suffolk Business Park, Bury St Edmunds</i></p> <p><i>Chelmsford Business Park, Chelmsford</i></p>

Key: Regional Strategic Site, Regional Gateway or Logistics Site; *Sub Regional Site*

5 Meeting Market Needs

5.1 Context and overview

Over the past 30-40 years the East of England has been one of the fastest growing regions of the UK in terms of both population and economic activity. The initial growth was fostered by Town Expansion and New Town as well as by outward migration from London. More recent strategy has sought to facilitate growth where it arises with an emphasis on the sustainable location of homes and new jobs to minimise travel to work, without making any radical interventions on existing trends.

In practice the overall economy largely mirrors the national economy in terms of performance and sectoral composition and has achieved similar growth rates. Nevertheless the geographical pressures differ significantly. The southern parts, including some of Essex and Hertfordshire are closely tied to the London economy. However, where the region differs from, say the rest of the south east, is the existence also of centres of independent economic dynamics such as Peterborough, Ipswich and Norwich and most especially of Cambridge. Similarly the market towns, the rural areas and coastal zones are subject themselves to separate and different pressures.

Recent years have also seen strong growth in nearly all parts of the service sector, both public and private. This sector has grown as a result of a combination of factors including a growth in activities as a result of increases in public expenditure and population. It is also based on service sectors serving markets outside the region. These include finance and insurance, legal services, scientific and engineering consultancy, education as well as tourism within the region.

Within the manufacturing sector, there is a large proportion of medium sized companies and a high growth rate of new companies. For much of the last 40 years the region also grew in manufacturing employment even when activity and employment was declining elsewhere, a factor usually explained by the ability to offer modern facilities and skilled labour. However, more recently the region has followed national manufacturing trends. However, restructuring obscures many sub trends. One trend has been an emphasis on research and development (R&D) with the region having probably the highest employment in R&D of all the UK regions; another has been an emphasis on high tech and advanced manufacturing activity.

The overall competitive advantages of the region are actually quite diverse and hard to pin down. The region has a particularly strong representation of Universities and internationally significant research organisations, which are likely to influence the location of new enterprises. There are many foreign owned firms, but the region has not been a large scale recipient of inward investment. Quality of life is very high across the region and the region offers good cultural and education facilities, certainly relative to the midlands or north. There is good access to the capital and internationally, although this varies across the region and a lack of access has helped to create strong retail clusters and captive catchment areas. There are also strong ports reflecting the growth of European trade. Entrepreneurship and rates of new firm formation are also strong. The region also offers a network of attractive medium sized centres.

5.2 Property Market Considerations

The property market plays a critical role in the delivery of strategic sites alongside the actions of planning authorities and other agencies. In general the delivery of strategic sites almost always requires interventions by both the private and public sectors. Many of those initially identified have had a strong public sector involvement including significant university involvement or initiatives by local authorities. In some cases, a private sector developer has been brought on board at a later stage as the viability of the basic scheme becomes established, or there has been “enabling” developments typically housing or retail uses on part of the site.

Underlying these partnerships has been the issue that employment developments have in recent years been more marginal in terms of viability than other uses such as housing, retail and leisure except in the strongest market areas. Many employment sites develop over the long period and given the requirement for upfront infrastructure, servicing and landscaping there is strong commercial imperative for early development. In some parts of the region this seems to have resulted in rather mixed developments involving offices, industry and research. Other uses such as retail and leisure developments and even housing has often materialised, in part because planning policy has not proved sufficient robust, and because commercial incentives for such uses are strong. The market for property is also cyclical in nature with different land uses experiencing peaks and demand for space at different times.

Assessment of the property market is problematic because of the ongoing effects of the credit crunch. However, even in “normal” times long term projections or generalisation are challenging and the property industry as a whole is strongly focused on the short term. A number of generalisations are however possible and collectively set a broad framework for viability and delivery.

- Values are determined by rental levels and expectations of rental growth over the longer term. The latter is reflected in the concept of yield. A low yield value suggests long term confidence in rental growth as it implies confidence in rental growth. The ideal is high rental levels and low yields.
- The decision to invest in property as opposed to other investments depends on differences in yields. Property is also an illiquid, long term investment option.
- The recent boom in property investment was partly driven by the relative strength of property and the downturn in equities after about 2001.
- Development is very sensitive to values because viability is often marginal.
- Values are typically cyclical with stronger markets experiencing longer peaks and thus windows of development activity and weaker ones having very short peaks. In weaker areas developers have to get developments underway and occupiers within a short period in order to catch the market.
- Market values also tend to follow the economic performance of end occupiers to a reasonable extent, because of their influence on demand.
- Accessibility is a major positive driver of value.
- High market values drive further development if land is available, low values while seemingly making areas competitive tend to have limited supply of new premises.
- Scarcity drives also drives values.
- The areas of the East of England closest to London and around the strongest centres such as Cambridge tend to achieve the highest market values.
- Speculative development (advance development of premises without an upfront occupier) is a feature of strong markets with long peaks long term confidence in value growth.
- Speculative development is the ideal in terms of maintaining a supply of premises.
- Business parks with consented and serviced land are an effective supply option in weaker markets because development can be achieved quickly to meet market peak demands. By contrast city centres can be sensitive environments and are associated with longer timescales, making the achievement of development more challenging.
- The market seems to prefer standard space provision, complex occupancy conditions on end uses or specialist provision tends to weaken viability and increase perceived value risks, unless the market is familiar with this type of supply.
- Markets are location specific, there is no real “regional” market.

The property market is cyclical and current conditions are probably at or near the bottom of the cycle. However, because the identification of strategic sites is intended as a long term plan, it is generally assumed that conditions will improve. Nevertheless the current cyclical decline is worsened by the credit crunch, which is likely to deepen and lengthen the cycle meaning that its effects cannot be ignored. A healthy development market requires both occupier demand and crucially land and property values that make development inherently viable in the sense that the value of a new building will exceed its cost by a sufficient margin to justify investment. It is therefore important to ensure that the designation of strategic sites to meet employment needs are underpinned by views on:

- What is viable now;
- What might become possible in the future as the cycle swings upwards again; and
- What is the most appropriate trade off between the various aspirations at different points in time

The reality is that property markets are locally rather than regionally specific and given the existence of smaller centres in the East of England, trends are heavily influenced by single large deals which occur only occasionally. It is possible however to distinguish three types of market based on strategic centres:

The general East of England market beyond the London Arc but excluding Cambridge. For offices the existing market is characterised by town centre offices built at the peak of the property cycles between 1960 and 1990 and a range of older buildings and conversions. Many are occupied by the public sector or longstanding private occupiers.

For industry the dominant provision is now industrial estates identified from the 1950s onwards, generally on the periphery associated with main roads but also associated with large housing estates reflecting good town planning principles. These estates have continued viability and most saw rents rise and yields fall during the recent boom. Many have seen strong demand, although there have typically been significant losses of land to other uses including retail and leisure based on higher values

The last 20 years have seen the rise of the business park or business park type space as the dominant model for the delivery of new space for both services, research and modern manufacturing. Many of these have been out of town, but a number of centres have been able to provide such conditions in or edge of town locations. In both boom and slump, the emphasis is mostly based on pre-lets on sites where occupiers can be provided with space in a short timescale.

The London Arc. This market is common to south east England. It is similar to the general East of England market, but heavily influenced by issues of access (rail and road), environment and image, as well as the profile of existing occupiers. The market in these locations is generally stronger than to the north and east and speculative development is less common. The extent of loss of older industrial estates is often greater and demand for industrial uses weaker, reflecting local employment profiles and skills. Speculative development has been occurring frequently during the boom, but pre-lets are now more likely to be the norm until the market recovers.

The Cambridge Market. This is one of the strongest locations of the region reflecting the strengths of the underlying economy. The overall market reflects a lack of any surplus supply and at times undersupply and as a consequence rents are higher than elsewhere and yields lower. For offices, supply is mostly out of town on parks, but there is a small but steady flow of town centre provision. Cambridge also offers specialist research and laboratory space through the market. Industrial demand is also strong.

Opportunities for non-commercial funding are from local authorities, universities, charities, EEDA and possibly the HCA. A limited number of strategic sites will fall within areas designated for European funding. In many areas, local authorities, universities and major charities (e.g. Wellcome) have played a major role, often as freeholders or guarantors.

5.3 Identification of Key Sectors

For the purposes of this strategic sites exercise, an understanding of regionally important sectors is required to identify sectors with significant growth potential and wider importance. These will be likely to create a demand for strategic sites. Additionally, an appreciation of the geographical concentration of these activities will help to understand links to sites, and identify pressures on land.

To achieve this analysis, sectors with potential for growth were identified and assessed in terms of:

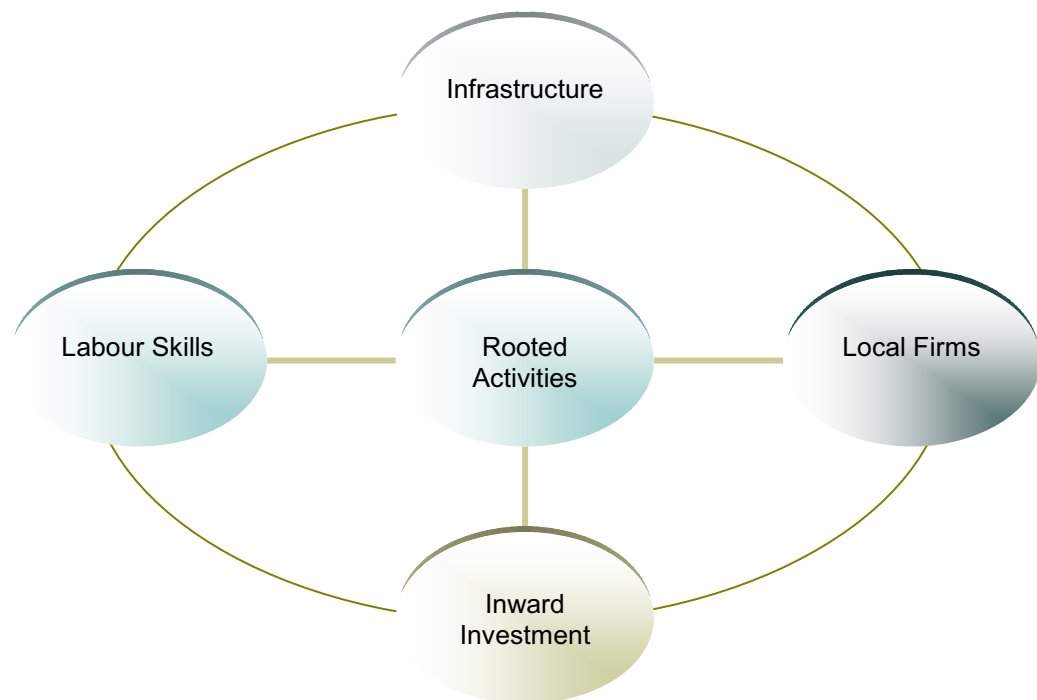
- Existing assets for growth and geographic focus;
- Likely future trends; and
- Implications of growth – land and location specific requirements for growth.

As implied above the East of England competes on a broad range of factors, but not generally on cost. It is apparent that the East of England can not compete on the production of commodifiable goods/services, as these can be produced elsewhere more cheaply. The future development of the region is therefore heavily reliant on activities which are 'territorialized' and able to compete on rare or unique qualities rather than price. These are activities which are inherently tied to or rooted in specific assets of a location, and can not be carried out elsewhere (low wage economies in particular).

This focus on qualities necessitates the development of industries which are in initial stages of development as these are typically closely rooted to specific place based assets. Activities in early stages of development are typically characterised by short production runs, rapidly changing techniques, and activities protected by 'know how' driven barriers to entry. The industrial structure of firms in initial stages of development are usually characterised by large numbers of small firms, highly specialist supply chains, few competitor locations and a reliance on highly technical knowledge / expertise. These characteristics are all closely related to place based advantages of sectors.

This type of high-order function is heavily reliant on repeated face-to-face contact between individuals. This interaction generates links between what can be thought of as the four 'pillars' of development: infrastructure, local firms, labour skills and inward investment. Where these interact and complement each other they create unique assets, which anchor economic activity to a location in the face of global competition.

Figure 5.1 The Four Pillars of Local Economic Development



Source: Rodriguez-Pose (2001)

Sectors with great economic potential for growth are those which build on existing local assets – exploiting strengths of highly specialised local firms and labour supplies, which are supported by specific infrastructure (including specialised public research organisations) and related inward investment. It is also these sectors which are likely to benefit greatest from localization economies of scale.

5.4 Sector Analysis and Forecasts

Sectors were identified for analysis through a review of an evidence base consisting of:

- Government Office for the East of England (2008) *East of England Plan*;
- EEDA (2008) *Inventing our Future: Collective action for a sustainable economy*;
- EEDA (2007) *Regional Economic Strategy for the East of England: Draft strategy for consultation*;
- EEDA (2006) *Review of Approach to Sectors and Clusters*;
- Woolthuis, Boekholt and Sowden (2000) *Developing clusters in the East of England Region*;
- The Work Foundation (2009) *Knowledge Economy and Enterprise*;
- P. Townroe and B. Moore *The East of England (1999)*;
- UK Trade and Investment, East of England International: *Aerospace and Airports, Aerospace, Automotive Centres of Excellence in the East of England, Automotive Innovation Drives Success in the East of England, Biofuels, Biomass, Biotechnology, Cambridge Imaging Systems, CleanTech, Cranfield University and Boeing IVHM Centre of Excellence, Creative and Media, Display Technology, eCommerce, Energy, Environmental Services, Financial Services, Food and Drink, Future Medical Technologies, Healthcare and Medical Devices, Honeytop Speciality Foods, Inkjet, Nanotechnology, Offshore Renewable Energy, Oil and Gas, Radio Frequency Identification,*

Semiconductors, Software and Services, Sustainable Construction, Technology, Telecommunications and Wireless;

- East of England Observatory;
- Sub regional partnerships – Greater Norwich Development Partnership – Greater Norwich Economic Strategy, and Cambridge Strategies;
- Oxford Economics (2008) *Employment Projections*;
- ONS (2009) *District Level VAT Registration Statistics by Sector*; and
- Existing knowledge.

The following sectors were identified for analysis:

- Advanced Engineering;
- Life-sciences, Pharmaceutical and Biotechnology;
- Agriculture and Food Production;
- Financial and Business Services;
- Computer Services and ICT;
- Environment Technologies and Energy;
- Creative Industries; and
- Transport and Logistics.

This analysis has also been informed by econometric projections of employment, produced by Oxford Econometrics in August 2008. Base predictions for 28 sectors of activity within the East of England are presented in Figures 5.2 and 5.3. These show that:

- Employment in manufacturing based activities are expected to continue to decline;
- Business services and health related activities are expected expand strongly;

These high-level and largely trend-based projections were used to gain an appreciation of the overall tone and direction of change for broad groups of activity. This note has also been informed by discussion with Oxford Economics relating to the likely impact of recent international economic developments on these forecasts. The impacts of these changes are summarised below:

Implications of Recent Economic Developments

The Oxford Economics econometrics forecasts operate based on three linked models of the global economy, the national economy and individual sectors. These are due to be re-run shortly and are anticipated to show the following deviation from the August 2008 estimates.

Global level – Large short term decline, but long run growth in world trade still anticipated – expanding world trade by 2010.

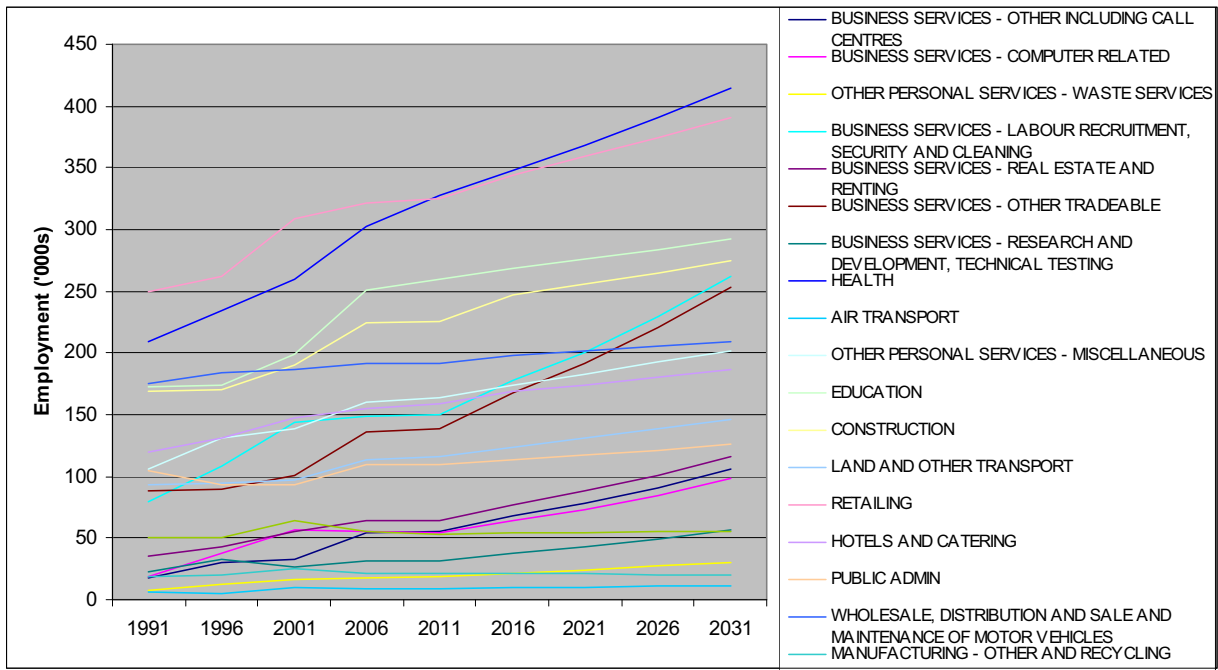
National level – Their UK model is driven by expenditure and is best considered in the following areas:

- Consumer expenditure severely depressed, but rapid recovery from 2010;
- Government expenditure anticipated to be strong; and
- Investment expenditure subject to a slow recovery.

Industry level – Model likely to identify the following departures from projections estimated in August 2008 :

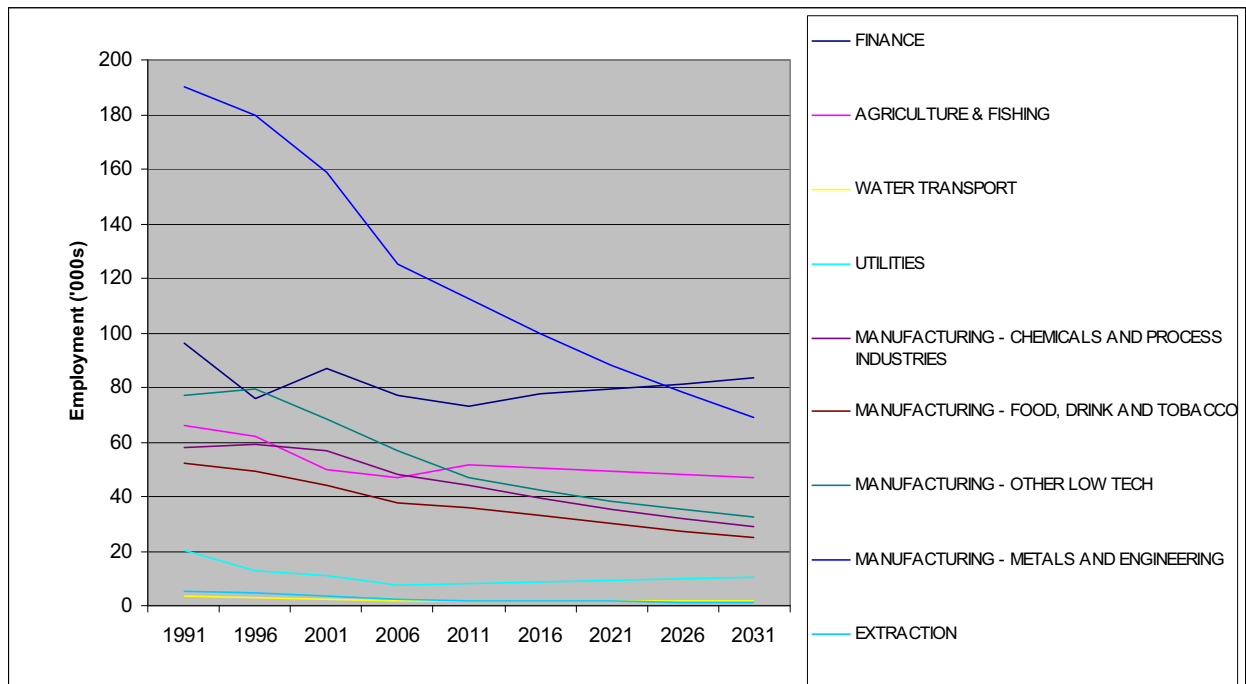
- Overall depression of most activities in the short run;
- Health sectors likely to be strong due to expanding government funding;
- Business services subject to large falls in 2008 and 2009, but likely to recover post 2010, and return to previous trends by 2016; and
- Retail, hotels, and distribution are likely to follow a similar, but less extreme pattern to business services (recovery post 2010).

Figure 5.2 Employment in Contracting Industries (1991-2031 '000s)



Source: Oxford Economics (2008)

Figure 5.3 Employment in Expanding Industries (1991-2031 '000s)



Source: Oxford Economics (2008)

Site Requirements

Common themes can be identified within the site requirements of these high-order economic activities. If sites are to meet their needs they must offer:

- Access to strong local labour supplies;
- Easy access to main road networks or strong public transport options;
- High quality physical environments;
- Up-to-date IT provision;
- Local amenities (if not provided on site); and
- Access to stable and adequate power supplies.

In addition to these general requirements, individual sectors specific site needs are explored in detail below.

5.5 Advanced Engineering

In contrast to the apparent long-term decline in general manufacturing, the region possess pockets of considerable strength in the development, design and manufacture of high-quality, highly specialised components and machinery. Aerospace, automotive and motorsport industries in particular, have been identified as significant.

These activities are far removed from cost-focused traditional mass production, and are at the forefront technical innovation. They can be considered to be manufacturing services and manufacturing research and development. Indeed within the region, advanced engineering research is conducted for clients including Ford, Jaguar, Volvo Trucks, Exxon Chemicals Ltd, Shell Oil, Lotus, Ricardo Consulting Engineers and Vauxhall Motors.

This activity is supported a number of institutions in the East of England:

- Cranfield University's Integrated Vehicle Health Management (IVHM) Centre of Excellence (in partnership with Boeing);
- Essex University, which has a focus on electrical systems engineering (including photonics, RF engineering, and multimedia architectures), computer science (including robotics); and

- Centres of automotive excellence including the Millbrook Proving Ground, Nissan Technical Centre Europe, Cranfield Impact Centre, Ford Dunton Technical Centre and TWI Ltd – World Centre for Materials Joining Technology.

This activity is anchored by the following leading firms:

- Aviation: Astrium, MBDA, BAE Systems, Marshall Aerospace, SR Technics and Boeing;
- Automotive: Ford, General Motors, Lotus and Nissan; and
- Other companies including: Unilever, BAE Systems, Nissan, Lockheed Martin Insys, Astra Zenica, Siemens and Trafficmaster.

The following locations include particularly significant concentrations of this activity:

- The A127 'Enterprise Corridor' with Ford's R&D facility at Dunton and New Holland;
- High value added manufacturing near to Peterborough;
- A motorsport cluster with a focal point at Hethel in Norfolk linking to Cranfield;
- Transport related high-tech engineering concentrated near Colchester; and
- Related to these advanced engineering activities is a world renown concentration of nanotechnology expertise and research around Cambridge.

Likely future trends

Predictions relating to loss of the manufacturing base, through the outsourcing of manufacturing to the Far East appear to have been oversimplified. Outsourcing has occurred for highly codifiable and process based aspects of manufacturing. However, high-value activities, especially research, development and design show signs of strong growth in many high-cost locations as aspects of manufacturing become part of the knowledge economy. Globally this trend is anticipated to continue, suggesting a continued role for this sector within developed economies.

A little removed from standard advanced engineering activities, the market for nanotechnology is widely anticipated to grow rapidly as many applications are brought to market (for example Electronics Industry Market Research and Knowledge Bank (May 2008) predicted that the market value of the industry will treble in the next 5 years).

Locational Requirements

As with other high value added knowledge based activities, advanced engineering benefits from strong localization economies of scale – highlighting the need for provision of space close to concentrations of these activities. Within the East of England this implies the importance of sites close to the A127 Corridor, near Peterborough, Hethel, Colchester and Cambridge. This locational consideration applies equally to many of the knowledge economy activities considered within this paper.

Site Requirements

These activities are likely to predominantly demand accommodation on business and industrial parks. Good access to the main road and other rapid distribution networks will be of particular importance for many firms within this sector, particularly those producing goods.

Likely Regional Implications of Growth

Importance of provision close to existing concentrations of activity within the East of England including:

- A127 Corridor
- Near Peterborough
- Hethel
- Colchester
- Cranfield
- Cambridge

5.6 Life-sciences, Pharmaceuticals and Biotechnology

The study of living things and the design and development of new treatments is an important sector for the regional economy. The sector is characterised by strong export figures and the successful attraction of a number of international firms. The Regional Spatial Strategy identifies that the entirety of the East of England has been identified as a life-sciences super-cluster as parts of the region have been the focus of highly successful commercialisation of related research activities.

The following nationally and internationally recognised institutions have helped to lay the foundations for this super cluster:

- The Genome Campus at Hixton & Laboratory of Molecular Biology in Cambridge (also known as ‘the Nobel factory’);
- Teaching hospitals including, Papworth Addenbrookes and the Norfolk and Norwich University Hospitals;
- The activities of anchor companies including: Baxter Healthcare, Bepak, Clement Clarke International, Ferraris Medical, GE Healthcare, Medtronic, Olympus KeyMed; and GlaxoSmithKline’s pharmaceuticals research facility in Stevenage.
- Anglia Ruskin University’s Bioengineering research group, Cambridge University’s Centre for Medical Materials, Cranfield University’s focus on bioformatic, biosensors and diagnostics, Essex University’s research on human-computer interfaces, Hertfordshire University’s BioPark and the University of East Anglia’s research on chemical biosensors

In addition to excellence in life sciences, the region possesses great strengths in the branch of micro biology that studies the use of micro organisms to perform specific industrial processes. The region is home to over half of the UK’s publically quoted biotech companies. Though a distinct activity, this sector is able to draw strongly on assets (especially labour skills) from the life-sciences.

The biotechnology industry is focused around two nodes of activity:

- Cambridge is home to 185 biotech companies, a quarter of Europe’s publicly-quoted biotechs and the Laboratory of Molecular Biology (noted above). Again the area has succeeded in attracting other firms to exploit the resident expertise of the people living around Cambridge; and
- Norwich is home to the largest concentration of plant, food and microbial scientists in Europe. Activity is concentrated around the Norwich Research Park which includes John Innes Centre, Institute of Food Research, the Sainsbury Laboratory and the Norfolk and Norwich University and Hospital Trust.

Working with these industries, the concentration of related firms has built up a highly specialist pool of local labour. This has proved attractive to inward investment, particularly in the Cambridge sub-region, Hertfordshire, Cranfield and Norwich.

Likely future trends

Within the East of England, econometric forecasts predict strong growth for health related sectors including life sciences and aspects of biotechnology. This growth is likely to be particularly strong in the short run, as the sector is relatively recession proof, and likely to be the recipient of considerable government investment. However, this funding source may be constrained in the longer term.

Locational Requirements

There are strong benefits associated with the co-location of these activities with research centres and clinicians. Further growth is likely to demand locations close to existing centres as new firms look to take advantage of specialist suppliers as well as using untraded links

between firms to tap into existing knowledge. These include the circulation of knowledge through the operation of the labour market as individuals move between firms, and through knowledge gained by suppliers being passed on to their customers. These effects operate best over relatively small areas. There are also strong crossovers between these activities and ICT sectors, therefore firms' locations requirements may also be influenced by concentrations of these activities. A good illustration of these is the crossovers in the nanotech market. As confirmed at the market workshop, this is currently a small sub sector of a number of areas of strength in the East of England including advanced engineering, biotechnology and ICT. However, this overlap of skills means the area may be poised for explosive growth.

Site Requirements

This sector is likely to demand B1 provision for both research and production activities. Existing facilities (such as the GlaxoSmithKline park in Stevenage) are typically characterised by an exceptionally high quality physical environment. It is likely that many firms in this sector will look to offer high quality work environments in order to compete for staff within this market. They will therefore be prepared to pay for the highest quality accommodation.

Likely Regional Implications of Growth

These requirements imply that demands from this sector for sites are likely to be strongest in areas with existing concentrations of these, and related activities:

- The Cambridge sub-region
- Hertfordshire
- Cranfield
- Norwich

5.7 Agriculture and Food Production

The region has a strong concentration of employment in Agriculture and Food Processing. The majority of agricultural land within the region is grade 3 or higher. There is a concentration of the best and most versatile land (grade 1) in the north west of the region within a triangle between Peterborough, Kings Lynn and Thetford. There are scattered areas of this land to the north east of Norwich and close to Bedford and Colchester. Areas of lower quality agricultural land (such as the Sandlings area) have been successful in realising high yields on lower quality land and there is evidence of ongoing agricultural production within the East of England abstracted from the local environment and land quality either within green houses, food factories or in historic agricultural production locations.

There is also a bloodstock cluster of international renown at Newmarket. This is linked to significant employment within the industry (including research at the Horseracing Forensic Laboratory), and in associated tourism.

The region is a focus for specialist R&D for the sector. This takes place at institutions including Cranfield University; IACR Rothamsted (the largest agricultural research centre in the UK) in Hertfordshire; the Institute of Food Research in Norwich, Writtle College in Essex and the Colworth Laboratory in Bedfordshire (being developed by Unilever as a world-class science park).

Anchor firms located across the region include: Allied Bakeries, Baxters, Bernard Matthews, Bowes of Norfolk, British Sugar, Britvic, Buxted Foods, Dalehead Foods, Del Monte, Greene King, Hain Celestial, W Jordan and Son Ltd, Kettle Chips, Masterfoods, McCain, Nestle Purina, Nestle Waters, Premier Foods, Stream Foods, Unilever (Colmans and Flora) and VION UK.

Likely future trends

The 2002 government funded Curry Report into the future of farming and food identified the likely future importance of local food production, and the importance of continued research towards ensuring sustainability within agriculture.

In the long term climate change is likely to have very significant impacts on agriculture and food production. These will be felt through environmental changes influencing production directly, or indirectly through increased flooding of low-lying (typically high yield) agricultural land – food security issues. Linked to these issues, and wider energy security concerns there may be growing pressures on agricultural land to be used for the production of bio-fuels. Additionally further development on agricultural land may place increased pressures on what remains. In contrast a trend towards the increased use of indoor food production, may reduce the significance of the quality of agricultural land, easing these pressures.

Location Requirements

The production of many foodstuffs is heavily reliant on the quality of agricultural land, and therefore the best and most versatile land identified above will be in greatest demand for arable farming. Associated research activities are less bound by land related constraints and are more likely to be influenced by existing distributions of researchers and institutions.

Site Requirements

The wide range of activities within this sector will create a diversity of accommodation need ranging from traditional agricultural accommodation to high-tech 'clean' research facilities.

Likely Regional Implications of Growth

Growth in agricultural production is likely to be concentrated in the existing concentrations of agricultural production identified above. The wide geographic spread of existing research institutions (Cranfield, Hertfordshire, Norwich, Essex and Bedfordshire) implies that growth of these sectors may create demands in any of a number of locations.

5.8 Financial & Business Services

Banking, insurance, accounting, and other supporting services are important areas of employment within the region. These activities have grown strongly in recent years, supporting national and international growth. This is concentrated in the following centres:

- Norwich – The city of Norwich has a strong labour pool of financial advisors, qualified bankers and insurance executives. In addition to hosting a number of finance firms (including Norwich Union and Virgin) the city has a strong business services sector based on the presence of a concentration of more than 50 regional and national headquarters which provide business services to a number of other locations, including Marsh, Bayer Crop Science, Colmans, Adobe Systems;
- Ipswich – concentration of major insurance companies including Churchill, Axa Insurance and Willis Faber Dumas Ltd. as well as the Ipswich Building Society;
- Southend-on-Sea – concentration of business services activities, particularly focusing on back office operations;
- Peterborough – The Norwich & Peterborough Building Society is headquartered here, and the area is the location for major employment in firms including foreign exchange firm Travelex, life and pensions fund operator Diligentia, BGL (parent of Budget Insurance) and securities firm BNP Paribas; and
- Cambridge – The concentration of venture capital activities around Cambridge is the greatest outside of London. These activities are best viewed as a 'key enabler', supporting other growth activities within the region, particularly entrepreneurship.

Likely future trends

Over the last 15 years, the UK, and London in particular, has been highly successful at selling financial and business services to a growing world economy. In the long run this has left these activities well placed to continue to grow if global economies, and world trade in particular, expand. Oxford Economics projections show finance sectors as relatively stable between 2008 and 2031, however, in contrast to concerns raised by developers at the market workshop, business service activities are anticipated to grow strongly over the period. Additionally, the close proximity and links between financial and business services in

the East of England and those in London, make the ongoing prominence of London as a World City, specialising in financial services, important for the continued success of this East of England Sector.

Globally, the growth of functional concentrations of these command and control corporate activities have been indentified, particularly within major city centres (Duranton and Puga 2004). This pattern is understood to relate to a response to technological development and a fall in the costs of remote management, allowing advantages from the co-location of these activities to dominate. Duranton and Puga noted however, that this functional specialisation is particular to centralised command and control activities, rather than all sectors. Their research also suggested that smaller cities have actually become less functional specialised over the last thirty years.

Locational Requirements

Financial and business service activities consistently require proximity to large pools of skilled labour. Many business services also depend heavily on close proximity to client businesses. These opportunities tend to be most available in urban locations, and places with very strong transport links. In the East of England this raises the importance of the largest settlements and areas closest to London for these activities.

Site Requirements

In addition to often demanding sites within urban locations, financial and business services tend to create demands for high quality office stock.

Likely Regional Implications of Growth

Any growth in financial and business services is likely to demand sites within existing centres of these activities:

- Norwich
- Ipswich
- Southend-on-Sea
- Peterborough
- Cambridge

These areas also offer large pools of skilled labour and concentrations of other economic activities (customers) which will be attractive to firms within this sector. Of the sectors considered here, financial and business services are most likely to demand town centre locations.

5.9 Computer Services and ICT

The development and production of computer hardware, software and related services has been one of the East of England's best performing sectors in terms of GVA and employment growth. The sector is supported by cutting edge software, hardware and computer services research at the University of Cambridge, Cranfield University, University of East Anglia, University of Essex, University of Hertfordshire and a number of private research laboratories, including those at: Accelrys, Adobe, Autonomy, BT, Cambridge Consultants, Diligenta, Northgate, Steria and Zeus.

Despite commonalities, the highly diverse nature of this sector necessitates the individual treatment of a number of sub-sectors.

- Telecommunications – through exploitation of assets including BT Labs (BT research arm), the Centre for Integrated Photonics and the Nortel Labs (well known for optoelectronics) a strong concentration of activity has developed around Ipswich;
- Semiconductors – Design and development of semiconductors is a strong regional asset. Cambridge is home to ARM and CSR and hosts the European R&D centres for Broadcom, Qualcomm, Hitachi and Toshiba;
- Display technology – Cavendish Laboratory at the University of Cambridge and the University of Essex's Optoelectronic Materials and Devices Laboratory in Colchester have created world leading centers of activity within the region;
- Inkjet printer design – one of only two global inject clusters is Cambridge; and

- Software – Microsoft’s recent \$100m investment in Cambridge, tapped into a long established cluster and a significant pool of skilled local labour.

Likely future trends

Computer services have been identified as likely to be the fastest growing (% growth) sector for the region over the next decade. This prediction is supported by Oxford Economics econometric projections.

Locational Requirements

Common to many activities identified above, advanced research aspects of computer services and ICT are likely to benefit from locations close to the research institutions and existing pools of highly skilled labour. The ICT sector also has particularly strong links to many other sectors. Locational decisions of firms will also therefore be strongly influenced by other activities within the East of England.

Site Requirements

Firms within this sector are likely to demand particularly high quality ICT infrastructure such as access to super-fast fibre-based broadband internet connections.

Likely Regional Implications of Growth

Likely that growth in this sector will demand sites close to existing research institutions and existing pools of skilled labour which are concentrated in the following locations:

- Ipswich
- Cambridge
- Colchester

5.10 Environmental Technologies & Energy

Environmental services renewable energy research and generation activities represent significant strengths for the region. The area is home to world-renowned universities, undertaking ground-breaking research and development in the area of environmental technologies. Examples include the University of East Anglia’s School of Environmental Sciences, Cranfield University’s School of Applied Sciences and its Sustainable Systems Department, and the University of Cambridge’s Centre for Climate Change Mitigation. Additionally the East of England is home to the Centre for Environment, Fisheries and Aquaculture Science and the Building Research Establishment.

These assets have been exploited through the development of a cluster of firms involved with Environmental Technologies which stretches from Essex to Cambridge, with a particular focus around Peterborough. Companies in the cluster include Anglia Water, Veolia Environmental Services, GE Water and Process Technologies, Hales Waste Control, Harrison Group Environmental, Perkins Engines, Hemcore, Butyl Products, Alphasense, Foneback, Aquablast Holdings, Cambridge Biopolymers, Dritex International and CMR Fuel Cells.

Expertise developed exploiting traditional oil and gas resources as well as in the regions nuclear power plants has helped to position the region to respond effectively to calls for renewable energy:

- The East of England is globally recognised for its expertise in offshore wind power generation. Lowestoft is home to Britain’s first Centre of Vocational Excellence for Offshore Technology, and there is local practical experience constructing off shore wind farms. These activities are supported by research centres originally focused on supporting the exploiting traditional energy sources such as the BP Institute at the University of Cambridge and Cranfield University’s Offshore Technology Centre. Orbis Energy (formally known as the Offshore Renewable Energy Centre) is likely to cement the position of Lowestoft and Great Yarmouth as centres for this activity.
- Biofuels - Regional R&D institutes include, Rothamsted Research, Norwich Research Park, The British Bioalcohols Group, The Department of Chemical Engineering,

Cambridge University, and The Algal Bioenergy Consortium (ABC) University of Cambridge.

- Biomass - Cranfield University's Process Systems Engineering Group researches power generation from biomass, waste and sludge. The University of East Anglia (UEA) is renowned world-wide for its climate change-driven research. Meanwhile Writtle College, part of the University of Essex, is home to the Centre for Environment and Rural Affairs, which aims to transfer lessons from research directly to the region's rural communities.

Likely future trends

Demands for environmental technologies and renewable energies are anticipated to grow strongly, supported by: a growing awareness of climate change issues and interest in adaptation and mitigation measures, global interest in public funded investment in environmental technologies as a potential route out of recession (particularly following the election of Barack Obama) and increased demand for renewable energies driven in the UK by the Climate Change bill.

Government planned construction of new nuclear power stations may create more employment within this sector.

Locational Requirements

The sector is associated with specific but highly diverse locational requirements. The generation of energy from renewable sources is characterised by highly specific locational requirements relating to access to renewable resources – the location of new activity will be driven by access to these. Similarly, many research activities benefit from close proximity to the environmental assets under investigation. Common to many knowledge economy activities, the locational requirements of other aspects of this sector are likely to be driven by close proximity to other pools of skilled labour and institutions.

Additionally many of these environmental technology activities are closely linked to other sectors including advanced engineering (standard and nanotechnology) and agriculture. Locational requirements for some activities will therefore also be influenced by concentrations of these activities.

Site Requirements

The spread of activities within this sector prevent any detailed predictions of site needs. However, it is likely that this sector will demand provision for sites suitable for research and development activities as well as industrial sites for the implementation of these technologies.

Likely Regional Implications of Growth

This sector is likely to generate demands for sites close to existing research institutions in Norwich, Cambridge, Cranfield and Chelmsford as well as close to existing clusters of activity and research around Peterborough and Lowestoft.

5.11 Creative Industries

The creative industries cover a very wide range of activities including: advertising, architecture, arts and antiques, designer fashion, video/film/photography, music/visual/performing arts, publishing, software/computer games & electronic publishing as well as radio and TV. Areas in close proximity to London (and its internationally significant creative industries) as well as strengths in related digital technologies have been identified as important assets for the creative industries within the East of England.

Overall export data does suggest that creative and media industries are performing well in the East of England and have grown strongly in recent years. The following two areas have been identified in particular:

- Production – the region is home to half of the UK's studios and production facilities. Hertfordshire is home to six studios, but Norwich is the most significant regional production centre. Companies based in the city include ITV Anglia, BBC East, Radio

Broadland, Radio Norfolk, Archant (the UK's largest independently-owned regional media business), Imago and Town House TV. Activities here are supported by the East of England Production Innovation Centre (EPIC);

- Multimedia – several thousand small firms have been identified across the region as engaging in multimedia based activities. These are typically small firms, predominantly located in rural locations across the region. Concentrations of these firms have been mapped electronic gaming and electronic publishing sectors in Peterborough, Norwich and Cambridge as well as concentrations of all multimedia firms in the south of the region (Hertfordshire and Essex);
- Culture – Particular strengths identified within the Haven Gateway sub region (International Centre of Excellence for Classical Music at Aldeburgh, a visual arts facility in Colchester, and DanceEast as part of the Cranfield Mill development in Ipswich), Luton (Carnival Arts) and Norwich (strong cultural infrastructure including theatres, museums, music venues and art centres);

Likely future trends

Nationally, the creative sector is thought to have grown at twice the rate of the national economy over the past decade, and is anticipated to continue to grow. Two important trends are likely to shape future developments within these sectors:

- A process of convergence between many creative industries and digital technologies – this is likely to increase the importance of areas such as Cambridge where both creative industries and digital technologies are strongly represented; and
- Further ICT developments allowing for the standardisation, and outsourcing of many aspects of the creative industries (such as the production of digital advertising). The result of this will be to leave value added within this sector increasingly focused on design activities. These higher-order, knowledge economy processes are heavily reliant on interpersonal contact, and therefore the trend may increase the importance of concentrations of creative activities.

Locational Requirements

The activities identified above cover a wide range of firms and associated requirements, making generalisation difficult – the needs of a sole trader software programmer are likely to be very different to a news agency. This accepted, examples of creative industries which create the greatest added value typically focus on strong networks operating at the heart of agglomerations of other activities – such as advertising and marketing within the West End of London and the Village in New York – or focus on the development of clusters of related businesses around one large anchor organisation such as the BBC. These aspects of their nature make it very hard to relate creative industries to an assessment of strategic sites.

Site Requirements

For the reasons outlined above, the site requirements for creative industries are highly diverse.

Likely Regional Implications of Growth

Though it is difficult to predict the demands of the creative industries, it is likely that this sector will create demands for sites close to existing concentrations of activity in Norwich, Peterborough, Cambridge, Haven Gateway and close to London in Hertfordshire and Essex. A significant proportion of this growth is likely to demand urban locations, and many activities within this sector will demand access to particularly strong ICT infrastructure.

5.12 Transport and Logistics

Services supporting distribution and international trade have experienced high GVA growth in recent years. Unlike other sectors considered here, this growth is driven by consumption and production in other industries and patterns of trade. As a result, the growth of logistics activities is heavily reliant on the performance of activities outside of the sector.

Global and UK based growth and trends towards increased geographical division of labour (facilitated by improved communication and co-ordination technologies) have increased the importance of these sectors.

Despite the limited availability of motorway infrastructure, the region has a strong logistics offer from:

- Ports: Tilbury, London Gateway, Harwich, Ipswich, Felixstowe, Lowestoft, Great Yarmouth, Kings Lynn, and Mistley;
- International airports: Luton, Stansted, Southend, Norwich;
- Concentrations of ground based logistics activities close to the ports and airports listed above and in Peterborough and Thurrock (supporting London); and
- Regional strengths in eCommerce underlined by the attraction/retention of firms including Amazon and Fagleaves.com, and by research at the Cambridge Centre for Communications Systems Research, and Cranfield University's Centre for Logistics and Supply Chain Management.

Likely future trends

As noted above, the demand for this sector is heavily reliant on other sectors and the UK's trading relationship with the rest of the world. Despite current global turmoil, it is highly likely that the UK will continue to depend heavily on international trade for growth. If this is the case, transport and logistics activities can be expected to experience strong growth.

A number of ports within the region are set to expand significantly, evidencing this expected growth. A recent study of Felixstowe port identified an additional demand for land of between 44-116 ha by 2023.

Locational Requirements

Demand is frequently characterised by highly specific requirements such as needs to locate close to specific markets, or immediately adjacent to other logistics facilities such as ports.

Site Requirements

Unlike many activities detailed above, the link between the throughput of logistics facilities and their land requirements is relatively stable – an expansion in activity on a site is likely to yield a requirement for more land. This requirement is particularly significant as logistics operations are often exceptionally land hungry, and require larger sites than other employment activities.

Likely Regional Implications of Growth

Demand for specific sites with good access to the region's expanding ports and airports as well as its road and rail infrastructure is likely to be strong. This is may be particularly apparent in the Haven Gateway area.

5.13 Summary of Findings

This analysis has identified the following sectors as likely to drive growth, and the following associated spatial requirements:

- **Advanced Engineering** – future growth likely to build on existing geographic concentrations of activity including areas within the A127 Corridor, and near Peterborough, Hethel, Colchester, Cranfield and Cambridge. These activities are likely to predominantly demand accommodation on business and industrial parks. Good access to the main road network will be of particular importance for any physical production activities;
- **Life-sciences, Pharmaceutical and Biotechnology** – strong benefits associated with co-location with existing research centres and clinicians likely to drive locational choices. Demands for sites from this sector are likely to be strongest in the Cambridge sub-region, Hertfordshire, Cranfield and Norwich. This sector is likely to demand B1

provision for both research and production activities. Existing facilities (such as the GlaxoSmithKline park in Stevenage) are typically characterised by an exceptionally high quality physical environment. It is likely that many firms in this sector will look to offer high quality work environments in order to compete for staff within this market;

- **Agriculture and Food Production** – food production heavily reliant on concentrations of high quality agricultural land (particularly in the north west of the region), other activities driven by existing distributions of researchers and institutions. The wide range of activities within this sector will create a diversity of accommodation need.;
- **Financial and Business Services** – future growth likely to focus on urban locations. Norwich, Ipswich, Southend-on-Sea, Peterborough and Cambridge are likely to be particularly relevant for this provision. These areas also offer large pools of skilled labour and concentrations of other economic activities (customers) which will be attractive to firms within this sector. Of the sectors considered here, financial and business services are most likely to demand town centre locations;
- **Computer Services and ICT** – future growth likely to build on existing concentrations activity within a number of distinct sub-sectors – Ipswich, Cambridge and Colchester in particular. Firms within this sector are likely to demand particularly high quality ICT infrastructure such as access to super-fast fibre-based broadband internet connections;
- **Environment Technologies and Energy** – while growth in primary and energy generation related activities is likely to be driven by the availability of resources, the growth in this sector will be strongly influenced towards existing institutions and concentrations of skilled labour, such as the concentration of renewable energy and offshore technical expertise in Lowestoft. The spread of activities within this sector prevent any detailed predictions of locational requirements. However it is likely that this sector will demand provision for research and development activities as well as industrial sites for the implementation of these technologies;
- **Creative Industries** – future growth likely to be concentrated around existing agglomerations or anchor organisations. A significant proportion of this growth is likely to demand urban locations, and many activities within this sector will demand access to particularly strong ICT infrastructure; and
- **Transport and Logistics** – future demands dominated by highly specific, facility related requirements. Demand for logistics sites close to ports and airports likely to be particularly strong. This is may be particularly apparent in the Haven Gateway area.

5.14 Strategic Sites and Growth Sectors

5.14.1 Regional Strategic Sites

The ability of the strategic sites to meet the locational demands of the growth sectors is illustrated in Table 5.1 below. With the exception of Butterfield Business Park (which does not have an apparent sectoral focus), all sites are placed to meet identified local sector-specific demands.

Table 5.1: Regional Strategic Sites and Growth Sectors

Site	Sectors
Butterfield Business Park, Great Marlings	<ul style="list-style-type: none"> • Broad sector focus
Cranfield University and Technology Park, Cranfield	<ul style="list-style-type: none"> • Advanced Engineering • Life-sciences, Pharmaceuticals and Biotechnology
Addenbrookes 2020 Vision, Cambridge	<ul style="list-style-type: none"> • Life-sciences, Pharmaceuticals and Biotechnology
Anglian Ruskin University, Peterborough	<ul style="list-style-type: none"> • Environmental Technologies & Energy
Babraham Research Campus, Cambridge	<ul style="list-style-type: none"> • Life-sciences, Pharmaceuticals and Biotechnology
Granta Park, Cambridge	<ul style="list-style-type: none"> • Life-sciences, Pharmaceuticals and Biotechnology • Advanced Engineering
Cambridge Science Park, Cambridge	<ul style="list-style-type: none"> • Life-sciences, Pharmaceuticals and Biotechnology • Financial and Business Services • Computer Services and ICT
A127 Enterprise Corridor, Basildon New Town & Southend	<ul style="list-style-type: none"> • Advanced Engineering • Transport and Logistics
Glaxosmithkline Cluster, Stevenage, Ware and Harlow	<ul style="list-style-type: none"> • Life-sciences, Pharmaceuticals and Biotechnology
Norwich Research Park and extension, Colney	<ul style="list-style-type: none"> • Life-sciences, Pharmaceuticals and Biotechnology
Adastral Park, Martlesham	<ul style="list-style-type: none"> • Computer Services and ICT

5.14.2 Regional Gateway or Logistics Sites

Regional gateway or logistics sites are split between those which serve a strategic demand for passenger travel, and those which contain intermodal freight facilities which meet strategic distribution needs. It is therefore not appropriate to relate these to the growth sectors as above.

5.14.3 Sub Regional Strategic Sites

Of the 30 sub-regional sites, 16 do not have a clear sectoral focus:

- Alconbury
- Cambridge East, Cambridge
- Chelmsford Business Park, Chelmsford
- Colworth Science Park, Sharnbrook
- Cuckoo Farm, Colchester
- Former British Sugar site Sproughton, Ipswich
- Gateway Peterborough and Great Haddon, Peterborough
- Gunnels Wood Stevenage
- Hostmoore Commercial Park, March
- Lakeside Basin, Thurrock
- Maylands, Hemel Hempstead
- Moreton Hall Industrial Estate/ Suffolk Business Park, Bury St. Edmunds
- Northstowe, near Longstanton
- Priory Business Park and iLab, Bedford

- Red Brick Farm, Peterborough
- Wixams new settlement, Bedford

Table 5.2 identifies the regional and sub-regional sites which may contribute to meeting the identified local sector-specific site demands. This highlights a number of sectors and locations which may need additional provision. These are summarised for each sector below:

- Advanced Engineering: Limited provision close to Peterborough, however this may be able to draw on provision for environmental technologies and energy. Otherwise provision is closely matched to anticipated sectoral demands;
- Life-sciences and Pharmaceuticals: Provision well matched to anticipated sectoral growth;
- Agriculture and Food Production: Limited provision for sector within the current portfolio of strategic employment sites;
- Financial & Business Services: Limited provision for sector within the current portfolio of strategic employment sites;
- Computer Services and ICT: Sector well provided for in Ipswich and Cambridge. Away from these areas there is limited provision for this sector within the current portfolio of strategic employment sites;
- Environmental Technologies & Energy: Sector well provided for in Peterborough and Lowestoft. Away from these areas provision within the current portfolio of strategic employment sites is limited;
- Creative Industries: Modest provision for sector within the current portfolio of strategic employment sites. However, as identified above, only a limited subset of these activities are likely to demand strategic sites; and
- Transport and Logistics: Provision of strategic employment sites and Gateway or Logistics Sites well matched to anticipated demand.

These needs may be attenuated if the geographic sphere of influence of these sector-specific demands are sufficiently flexible to exploit sites in alternative locations. Additionally some of these needs may be met through occupation of the 16 general employment sites listed above.

The analysis above highlights strong overlaps between existing policy, the sectors with potential for growth and sites. The RSS policy E4 (captured above within Section 2.3.2.3) identifies the main clusters of economic activity which should be supported. The analysis of sectors with potential for growth and provision of strategic sites above matches closely to this existing policy. The RES contains no such consolidated list, but consistently identifies these sectors as assets and opportunities within its seven engines of growth. In this way the interpretation of sectors and sites is in broad compliance with existing RES and RSS policy.

Table 5.2 Sector Demands and the Current Portfolio of Strategic Employment Sites

Sector	Demands	Regional Sites	Sub-Regional Sites	Other Sub-Regional Sites
Advanced Engineering	<p>Importance of provision close to existing concentrations of activity within the East of England:</p> <ul style="list-style-type: none"> • A127 Corridor • Near Peterborough • Hethel • Colchester • Cranfield • Cambridge 	<ul style="list-style-type: none"> • A127 Enterprise Corridor, Basildon New Town & Southend* • Cranfield University and Technology Park, Cranfield* • Cambridge Science Park, Cambridge 	<ul style="list-style-type: none"> • Hethel Engineering Centre, Hethel • East of St. Neots • Huntingdon West / Hinchingsbrooke Park, Huntingdon • University North West Cambridge, Cambridge • Millbrook Proving Ground, Millbrook 	<ul style="list-style-type: none"> • Knebworth Innovation Park, Stevenage • Lancaster Way Business Park, Ely
Life-sciences, Pharmaceuticals and Biotechnology	<p>These requirements imply that demands from this sector for sites are likely to be strongest in:</p> <ul style="list-style-type: none"> • Cambridge sub-region • Hertfordshire • Cranfield • Norwich 	<ul style="list-style-type: none"> • Addenbrookes 2020 Vision, Cambridge • Babraham Research Campus, Cambridge • Cranfield University and Technology Park* • Glaxosmithkline Cluster, Stevenage, Ware and Harlow • Granta Park • Granta Park, Cambridge • Cambridge Science Park, Cambridge* • Norwich Research Park, Colney 		
Agriculture and Food Production	<p>Growth in agricultural production is likely to be concentrated in the existing concentrations of grade 1 land identified above.</p> <p>The wide geographic spread of existing research institutions (Cranfield, Hertfordshire, Norwich, Essex and Bedfordshire) implies that growth of these sectors</p>		<ul style="list-style-type: none"> • South West Wisbech / Weasenham Lane, Wisbech 	

Sector	Demands	Regional Sites	Sub-Regional Sites	Other Sub-Regional Sites
	may create demands in any of a number of locations.			
Financial & Business Services	Any growth in financial and business services is likely to demand sites within existing centres of these activities: <ul style="list-style-type: none"> Norwich Ipswich Southend-on-Sea Peterborough Cambridge 	<ul style="list-style-type: none"> Cambridge Science Park, Cambridge* 		
Computer Services and ICT	Likely that growth in this sector will demand sites close to existing research institutions which are concentrated in and around: <ul style="list-style-type: none"> Ipswich Cambridge Colchester 	<ul style="list-style-type: none"> Adastral Park, Martlesham Cambridge Science Park, Cambridge* 		
Environmental Technologies & Energy	This sector is likely to generate demands for sites close to existing research institutions in Norwich, Cambridge, Cranfield and Chelmsford as well as close to existing clusters of activity and research around Peterborough and Lowestoft.	<ul style="list-style-type: none"> Anglian Ruskin University, Peterborough 	<ul style="list-style-type: none"> Lowestoft Power Park, Lowestoft Redevelopment of the South Bank, Peterborough 	<ul style="list-style-type: none"> NIRAH and Science Park, Marston Vale South West Canvey, Charfleets extension and Northwick Road, Canvey Island
Creative Industries	It is likely that this sector will create demands for sites close to existing concentrations of activity in Norwich, Peterborough, Cambridge, Haven Gateway and close to London in Hertfordshire and Essex.		<ul style="list-style-type: none"> Leavesden Studios, Leavesden 	
Transport and Logistics	Demand for specific sites with good access to the regions' expanding ports and airports likely to be strong. This is likely to be particularly apparent in the Haven Gateway area.	<ul style="list-style-type: none"> A127 Enterprise Corridor, Basildon New Town & Southend* Regional Freight Interchange - Magna Park, Whittlesey (regional logistics site) 	<ul style="list-style-type: none"> Innocence Farm 	

Note: * some sites linked to more than one sector

6 Towards a Regional Action Plan

6.1 Overview

Having identified strategic employment sites and reflected these in planning policy, the next step is to identify the actions necessary to prime these for investment, by working closely with relevant stakeholders including other agencies, authorities and the private sector. The general ambition in terms of business development is that the sites should support cluster development, business incubation and university spin-outs, in addition to providing high quality locations for both indigenous and inward investment.

Delivery of the sites is closely linked to achieving skills objectives, supporting large scale job creation, particularly high-value jobs in the knowledge-based industries. A number of the sites have a specific focus on developing closer links between the region's world class higher education institutions and industry.

The overall mix of actions implemented in relation to strategic sites will, of course, be dependent on the circumstances at individual sites, which are considered on a site by site basis for the regional strategic sites in Appendix E. However, it is also possible to determine common regional action plan framework within which these can be considered. The prime objective of the actions is, of course, to enhance the overall competitive position of the sites for development and investment, especially by the private sector. This typically means increasing awareness of the opportunities, addressing the kinds of market failures or constraints to development, minimising developer or investor risks and addressing offsite constraints. Each of these issues is discussed below, concluding with the preferred actions.

6.2 Raising Awareness

Awareness and promotion of sites is a basic and traditional economic development activity, although recent years of economic success have perhaps made this less important. Inward investment agencies have typically been able to address inward investment queries, in part by providing details of a portfolio of possible development sites including existing occupier details. Monitoring sites and increasing awareness of opportunities can also assist in the speedy redevelopment or reoccupation of existing sites.

As suggested in earlier sections, most of the strategic sites have a vision and strategy for their future development, several also have promotional material. A large proportion of this material is not primarily aimed at the external investor, rather it is for planning or site development purposes. Similarly even this report, although containing details of the sites, is broadly aimed at identifying sites for designation, rather than promoting the sites. However, in practice most actors would still relate to this material.

Any sort of actions concerned with raising awareness of the regional strategic sites would need to be considered carefully with East of England International and local authority economic development officers and other local agencies. However, it seems to us that there is a case for a regional sites 'prospectus'. We suggest that this would be primarily web-based and take the form of any overall summary of the regional scale sites and local contacts, as well as a basic portfolio of information on each site, comprising:

- General context and existing occupiers, including photographic images
- Site Plans
- Vision
- Development opportunities
- Local contacts and support services
- Recent success stories, events, etc.

Most of this information is available from existing sources, although its re-presentation through a standard template and branding would be appropriate. In some cases it would also be possible to provide web links to existing employment site websites. The general aim would be to ensure that the information could be regularly updated and allow current news to be included.

A more sophisticated version, might be based on an interactive map, perhaps following google-earth type formats and linked databases which would allow those interested to 'drill down' into specific areas or contexts. This might be extended to include all sites. A good example is the London Brownfield Sites database.

If the East of England chooses to pursue this option, it is important that the approach is practical and that sufficient resources are in place to maintain the system. The major advantage of a regional system might be that it would encourage investors to consider a full range of regional options, rather than just the obvious, high profile ones.

6.3 Addressing Developer Risks

Development of the strategic employment sites is likely to occur by developers, speculatively or on the basis of pre-lets, or for some large or distinct uses by owner occupiers. In some limited cases the public sector may be the developer, although the public sector may play a significant role in site preparation and infrastructure.

Experience suggests that developer and investor preference is for 'oven-ready' sites, where development risks are minimal and development can occur quickly to meet market demands. Typical risks include ownership and site value risks, planning risks, site conditions and constraints of infrastructure including transport and utilities provision. In essence these are factors which may delay development with cost and viability implications. Ready to use sites are particularly important where the market for speculative development is limited and development proceeds on the basis of pre-lets and early completion/occupation.

These risks are also directly relevant to the regional strategic sites identified in the East England. For example on the Norwich Research Park ownership, planning and transport issues have not been resolved on all of the intended expansion area, and power supply constraints are a potential issue at Adastral Park and so on. Sites may also require upgrades to their access as they develop. Land conditions, including possible contamination or foundation requirements are also a significant risk and may require detailed investigations. In current market conditions, very little employment related development will proceed speculatively and even in the recent boom it was only the strongest locations which could support such development.

The public sector can play a significant role in overcoming these risks, through a range of factors including:

- Site assembly and preparation
- Addressing planning risks, e.g. by securing advance outline permissions for pre-lets, or taking a realistic approach to S106, etc.
- Infrastructure provision and planning
- Preparing advance information on site conditions, etc.

Given their strategic nature and the emphasis on the attraction of footloose or specialist uses, there is a case for taking a more proactive approach for getting sites 'oven-ready' and creating more favourable conditions, as investment can go elsewhere. At the workshop for the study the private sector placed particular emphasis on importance of considering strategic employment sites in the context wider infrastructure planning.

In terms of specific actions for organisations such as EEDA the key roles are probably in facilitating activities to ensure that the issues are addressed. This means:

-
- Monitoring progress and events on the strategic sites, using a combination of AMR data and having regular direct contact with local actors.
 - Benchmarking conditions across the sites in the region (and with other regions).
 - Engaging with and supporting the local management resources.
 - Helping to identify and focus business support measures on the sites.
 - Taking a proactive stance towards identifying opportunities on the sites, or addressing deficiencies.
 - Ensuring the needs of strategic sites are represented in regional infrastructure assessments and funding priorities.
 - Coordinating, managing or funding supporting studies, site masterplans investigations, etc.
 - Engaging with infrastructure and utilities providers

These roles reflect the fact that there are elements of market failure in the performance of these roles as local actors lack resources or a strategic overview. However, this is variable and actual involvement will be site specific and may range from 'light touch' through to strategic leadership. It will also depend on the nature and involvement of local actors.

Sections 4 and 5 of this report suggest limited gaps in current site provision to meet sectoral or geographical requirements, although this is an issue that should be kept under review.

Further site specific actions are identified in Appendix E, which sets out the findings of a desktop appraisal of the prioritised regional strategic sites. The desk top appraisal was complemented with site visits to the majority of the sites and discussions with the key players, such as relevant strategic and local authorities and major occupiers. The appraisals set out:

- A basic description of the site to date;
- Future potential and growth plans; and
- Any deliverability issues or risks.

7 Recommendations

7.1 Recommendation 1

Recommendation: Policy E3 should be retained.

Policy E3 plays an important role in facilitating the development of strategic employment sites of the quality and quantity required to meet the needs of the region. The policy provides clear guidance to local planning authorities on the broad location and type of strategic employment provision which should be promoted in local planning policy.

7.2 Recommendation 2

Recommendation: Named locations within Policy E3 should be reviewed

The identified locations in Policy E3 should be reviewed in the light of the gap analysis. Some identified locations may cease to play a strategic role in the future and new strategic locations may come forward, such changes should be reflected in the policy.

This study has identified specific geographical 'gaps' at Thetford and Welwyn Garden City and Hatfield. The inclusion of these areas should be re-examined to determine if there is still a need for strategic employment sites in these locations. If so, the priority will be to identify and accord protection to appropriate locations.

An aspiration for a number of the regionally strategic locations is to identify strategic employment sites to assist with the regeneration of the area. As discussed in Section 4 the identified portfolio of strategic employment sites does not seem to necessarily sit well with this aspiration. Judgement on whether such sites should be included to act as a flagship projects in regeneration areas should be assessed on a site by site basis.

7.3 Recommendation 3

Recommendation: A definition of strategic employment sites should be included within the supporting text for Policy E3

It would be worthwhile to include a definition of strategic employment sites to ensure that sites are consistently identified around the whole region. The following definitions and hierarchy are proposed for inclusion.

7.3.1 Strategic Employment Sites and the East of England Plan

The designation 'strategic employment site' should be used in future in the Plan to describe a short list of key employment sites in the region as identified in this report. The delivery of these sites would be will be critical to the effective implementation of the RES and the RSS, in particular supporting existing policies E2, E3 and E4.

In terms of business development, the sites are likely to be or be capable of supporting cluster development, business incubation and supporting university spin-out, in addition to providing high quality locations for both indigenous and inward investment.

Strategic employment sites should have – or have the potential to develop – a very clear vision for their future role on terms of providing space for specific or leading edge sectors or clusters that offer potential to meet RES ambitions. These sectors will service national or international areas and be capable of developing a strong reputation in these markets. In this context there is a clear distinction between general business parks and industrial estates and regionally strategic sites. By having a clear vision, regional strategic sites are intended to develop the kinds of World Class reputation that is already apparent from the most successful sites in the region, such as the Cambridge science parks. They would also be designed to overcome a tendency for sites to accommodate all development that is available, resulting in a rather diverse range of unconnected uses. The regional strategic sites are also intended to be long term development options, capable of development over 20 years or more. They are also sites which need careful management, most particularly to

ensure that they develop as leading edge 'brands' which are synonymous with leading edge success. This means taking a long term perspective and avoiding incompatible uses and poorer quality uses that undermine this brand or reputation.

The key characteristics of regional strategic sites are:

- High quality sites, which are attractive to national and international investors;
- Have good road and public transport accessibility;
- A clear identity/ brand and future vision for the site;
- Should accommodate development, which could not equally be accommodated elsewhere; and
- Support specific sectoral needs, such as knowledge based services clustered close to universities, major hospitals or other research establishments. .

From a planning perspective the identification of strategic sites in RSS as a part of the statutory development plan would be of great assistance in safeguarding the site for employment use in the face of higher value uses.

From an economic development perspective such a designation would be of great assistance in focusing other activities such as public sector or other third party funding or infrastructure development.

However it also needs to be made clear that any site not specifically identified in the RSS should be excluded from planning protection.

7.3.2 Adoption of a Common Strategic Sites Hierarchy

Our judgement is that there is also scope for the adoption of common terminology in the designation of employment sites across the region based on the following designations:

- Regional strategic sites,
- Regional Gateway or Logistics Sites, and
- Sub regional strategic sites.

These sites would be identified through the LDF process, with the intention, as for regional sites of improving safeguarding against non employment uses and to provide focus for investment.

In combination with the identification of Regional Strategic Sites, a resulting new policy could be similar in structure and coverage to policy E5 on Town Centres.

Such new policy would identify sites as set out below, with our study providing an evidence base and initial designations of special interest and sub regional sites. In most cases it would be appropriate for LDDs to identify the range of employment uses intended for such sites.

Regional Gateway or Logistics Sites

The term 'regional gateway or logistics site' would apply to airports, ports and logistics sites. These sites must contain inter-modal freight facilities and terminals to encourage sustainable passenger and freight distribution; and serve more than a local market.

The key characteristics of regional gateway or logistics sites are:

- Served by rail and operate as inter-modal terminals;
- Have good road and rail access;
- Meet a strategic demand for passenger travel or distribution; and
- Provide an opportunity to accommodate users associated with the terminal, which require physical proximity.

Sub Regional Strategic Sites

Sub regional strategic sites would tend to be larger sites however they would have a more general focus than would be expected on regional strategic sites. The differences between regional and sub regional strategic sites may in some circumstances be relatively marginal; and in fact, a cluster of sub-regional strategic sites may cumulatively be of regional strategic importance.

Sub regional strategic sites would typically be highly accessible sites and those that meet RSS/ RES objectives such as regeneration or skills development or the creation of sustainable communities by supplying sufficient quality employment alongside new or existing residential areas. They may have strong brands and reputations, but these brands and reputations would be typically linked more to the location or place and form part of a range of employment land offer. They would also accommodate more locally focused users. They are differentiated from local sites in terms of scale and the attraction of sub-regional functions as well as offering good strategic access. The design and layout of these sites and they type of premises in existence or likely to be developed should provide an attractive and competitive environment for higher order modern employment sectors.

The key characteristics of sub regional strategic sites are:

- Good quality site, which are attractive to businesses with sub-regional foci;
- More likely to offer general employment space rather than be sector specific;
- Have good road and public transport accessibility; and
- Support wider RSS/ RES objectives, such as regeneration or creation of sustainable communities.

Other “local” sites

The definition of what constitutes a strategic employment site will vary significantly depending on context. Thus for a particular local authority area, a site may be of strategic importance, although would not be considered of strategic importance in the wider regional field. For the purpose of this study, these locally significant sites will be termed ‘local employment sites’. However, it is acknowledged that the quality, scope and size of these sites could vary widely.

It is probable that ‘regional’ strategic employment sites will account for less than a quarter of the total requirement in the East of England. In this context, the importance of local employment sites should not be underestimated, and they have a key role to play in providing an appropriate portfolio of sites to meet the needs of all businesses.

7.4 Recommendation 4

Recommendation: Individual sites should not be named within Policy E3.

The policies in the RSS provide an overarching development framework and are not intended to provide rigid site specific policies, which local authorities must adhere to. Specific sites should be identified at the local level through information gathered to inform LDD preparation, namely employment land reviews.

7.5 Recommendation 5

Recommendation: A central list of strategic employment sites should be maintained.

A central list of the location, capacity and delivery of strategic employment sites is required in order to fully understand the existing situation in respect of employment provision and aid the future prioritisation and delivery of such sites. Such a list will ensure that such sites meet the identified business and market needs in the time required.

7.6 Recommendation 6

Recommendation: Specific policies should be included within LDDs to protect strategic employment sites.

LDDs should take into account and facilitate the delivery of the policies in the RSS by including complementary land use policies and proposals. LDDs have a role to play in safeguarding land that is likely to be needed for employment against other development pressures. The location and quality of employment land provision is critical to economic success and LDDs should ensure there is a high quality employment land offer, taking account of the contribution from strategic employment sites.

7.7 Recommendation 7

Recommendation: All sites should be subject to regular review.

All sites should be subject to regular review, so that new sites could be added and sites which failed to realise their ambitions over a sustained period could also be re-designated. The proposed mechanisms for the review process is the AMR.

Appendix A

**Employment Land
Reviews**

A1 ELR Progress

Bedfordshire & Luton

Authority	ELR	Title (Date)
Bedford	Yes	Bedford Employment Land Study (2006)
Luton	Yes	Luton And South Bedfordshire Joint Employment Land Review (2008)
Mid Bedfordshire	Yes	Mid Bedfordshire Employment Land Review (2007)
South Bedfordshire	Yes	Luton And South Bedfordshire Joint Employment Land Review (2008)

Cambridgeshire & Peterborough

Authority	ELR	Title (Date)
Cambridge	Yes	Cambridge City and South Cambridgeshire Employment Land Review (2008)
East Cambridgeshire	Yes	East Cambridgeshire Employment Sites Survey (2006)
Fenland	Yes	Fenland District Council Employment Land Review (2006)
Huntingdonshire	Yes	Local Development Framework Employment Land Review (2007)
Peterborough	Yes	Peterborough Employment Land Review (2008)
South Cambridgeshire	Yes	Cambridge City and South Cambridgeshire Employment Land Review (2008)

Essex, Southend-On-Sea & Thurrock

Authority	ELR	Title (Date)
Basildon	No	Basildon District Employment Capacity Study (in progress)
Braintree	Yes	Mid Essex Economic Futures (2005) Employment Land Review (2007)
Brentwood	No	Mid Essex Economic Futures (2005)
Castlepoint	Yes	Castlepoint Employment Study (2006)
Chelmsford	Yes	Chelmsford Employment Land Review (2006) Mid Essex Economic Futures (2005)
Colchester	Yes	Haven Gateway Employment Study Colchester Employment Land Study (2007)
Epping Forest	No	
Harlow	No	Employment Land Requirement and Utilisation Study
Maldon	Yes	Employment Land Review (2009) Mid Essex Economic Futures (2005)
Rochford	Yes	Employment Land Study (2008)
Southend-on-Sea	No	
Tendring	No	Local Plan Supporting Document – Employment Land Studies (2004) Employment Land Review (in progress)
Thurrock	Yes	Employment Study (2005) Thurrock Employment Land Review (2007)

Uttlesford	Yes	Appraisal of Employment Issues (2006)
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Hertfordshire

Authority	ELR	Title (Date)
Broxbourne	Yes	Broxbourne Employment Land Study (2008)
East Hertfordshire	Yes	Employment Land and Policy Review (2008)
North Hertfordshire	Yes	Employment Land Review (2005, 2006 & 2007)
Stevenage	Yes	Employment Land Survey Evidence Base (2005) Employment Capacity Study (2006)
Watford	Yes	SW Hertfordshire Employment Space Study (2005)
Dacorum	Yes	SW Hertfordshire Employment Space Study (2005)
Hertsmere	Yes	Central Hertfordshire Employment Land Review (2006)
St Albans	Yes	Central Hertfordshire Employment Land Review (2006)
Three Rivers	Yes	SW Hertfordshire Employment Space Study (2005)
Welwyn	Yes	Central Hertfordshire Employment Land Review (2006)

Norfolk

Authority	ELR	Title (Date)
Norfolk	No	Employment land monitoring report (2008) Norfolk Employment Growth Study (2005)
Breckland	Yes	Breckland Employment Land Review (2005)
Broadland	Yes	Greater Norwich Employment Growth and Sites & Premises Study (2009)
North Norfolk	Yes	North Norfolk Review of Employment Land (2006 & 2007 update)
South Norfolk	Yes	Greater Norwich Employment Growth and Sites & Premises Study (2009)
Great Yarmouth	Yes	Employment Land Study (2006) Waveney and Great Yarmouth Employment Land Study (2006)
Kings Lynn and West Norfolk	Yes	Employment Land Study (2007)
Norwich	Yes	Greater Norwich Employment Growth and Sites & Premises Study (2009)

Suffolk

Authority	ELR	Title (Date)
Babergh	Yes	Haven Gateway Employment Land (2005) Haven Gateway Employment Study Update (in progress)
Forest Heath	Yes	Employment Land Study (2006) Employment Land Review (2007)
Ipswich	Yes	Haven Gateway Employment Land (2005) Haven Gateway Employment Study Update (in progress)
Mid Suffolk	No	Employment Land Review (in progress)
St Edmundsbury	No	Employment Land Review (in progress)
Suffolk Coastal	Yes	Haven Gateway Employment Land (2005) Haven Gateway Employment Land Study Update (in progress) Suffolk Coastal Employment Land Study (2006)
Waveney	Yes	Waveney Employment Land Study (2006)

A2 East of England ELRs – Approach to Strategic Employment Sites

Bedfordshire & Luton

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
Bedford	No	Strategic Employment Sites not referred to or defined.
Luton	Yes	Reference made to Strategic Employment Sites, but they are not defined.
Mid Bedfordshire	No	Strategic Employment Sites not referred to or defined.
South Bedfordshire	Yes	Reference made to Strategic Employment Sites, but they are not defined.

Cambridgeshire & Peterborough

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
Cambridge	Yes	Strategic Employment Sites are identified but not clearly defined. Reference is made to the Cambridgeshire and Peterborough Structure Plan 2003 which defines Strategic Employment Sites as sites which 'provide important opportunities for employment growth because of their scale and/or their suitability for prestige development in strategic locations'.
East Cambridgeshire	No	Strategic Employment Sites not referred to or defined.
Fenland	Yes	Reference made to Strategic Employment Sites, but they are not defined.
Huntingdonshire	Yes	Reference made to Strategic Employment Sites, but they are not defined.
Peterborough	Yes	Strategic Employment Sites are identified but not clearly defined. Reference is made to the Cambridgeshire and Peterborough Structure Plan 2003 which defines Strategic Employment Sites as sites which 'provide important opportunities for employment growth because of their scale and/or their suitability for prestige development in strategic locations'.
South Cambridgeshire	Yes	Strategic Employment Sites are identified but not clearly defined. Reference is made to the Cambridgeshire and Peterborough Structure Plan 2003 which defines Strategic Employment Sites as sites which 'provide important opportunities for employment growth because of their scale and/or their suitability for prestige development in strategic locations'.

Essex, Southend-on-Sea & Thurrock

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
Braintree	No	Strategic Employment Sites not referred to or defined.
Castlepoint	No	Strategic Employment Sites not referred to or defined.
Chelmsford	Yes	Reference made to Strategic Employment Sites, but they are not defined.
Colchester	Yes, refers to draft RSS policy	Haven Gateway Employment Study: Uses the 2002 regional sites study, to identify strategic sites, based on ten criteria: minimum size (10ha), financial incentives, competitive position, image/ profile, supply chain position, local market position, local facility provision, transport connectivity, workforce connectivity and ICT connectivity.
	Yes, acknowledges RSS Policy E4	<p>Colchester Employment Land Study: Identifies a typology of employment sites, including strategic employment sites. These are defined as those of strategic significance for the Borough, to be predominantly located in the main urban area and to be viable locations for supporting B1, B2 and B8 land uses. Strategic Employment Sites to normally meet the following criteria:</p> <ul style="list-style-type: none"> • Part of established area of existing industrial, warehousing or office-based activity. Normally including more than 4,000 sq.m of employment floor space. In addition, employment floor space should represent a minimum of 30% of the total area of floor space within the area. • Support clusters of economic activity of particular importance to the future growth of the economy. • Well located in proximity to the road network and normally accessed directly from the strategic road network. • Good links to public transport, walking and cycling routes. • High quality/ attractive physical environment and public realm. • Provides an existing role or offers potential with regard to the provision of premises serving small and medium sized businesses. • Provides lower cost accommodation suitable for small, start-up or lower-value industrial, warehousing or office uses or other business important to the local economy. • Contributes to local employment objectives and local economic diversity.
Rochford	Yes	Definition not explicitly established. However, establishes that particular sites have greatest potential to serve as strategic employment sites for the district based on their physical location and in particular in relation to their strategic access.
Tendring	Yes, refers to draft RSS policy	Uses the 2002 regional sites study, to identify strategic sites, based on ten criteria: minimum size (10ha), financial incentives, competitive position, image/ profile, supply chain position, local market position, local facility provision, transport connectivity, workforce connectivity and ICT connectivity.

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
Thurrock	No	Strategic Employment Sites not referred to or defined.
Uttlesford	Acknowledges RSS Policy but no further references in document	NA

Norfolk

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
Breckland	Acknowledges RSS policy and LDD objectives	NA
Broadland	Acknowledges RSS policy	NA
Great Yarmouth	Acknowledges RSS policy	NA
Kings Lynn and West Norfolk	No	Strategic Employment Sites not referred to or defined.
North Norfolk	Yes	'High' strategic importance – Planning – site is designated for a specific use; there is limited supply of land; site is a large site or adjacent to a principal settlement Sustainability – site would be allocated for employment purposes today having regard to sustainability criteria; site is unsuitable for other uses

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
		<p>Market Attractiveness – site is fully occupied or being marketed with planning permission and/ or there have been expressions of developer interest</p> <p>Strategic Planning Factors (from 2007 Addendum)</p> <ul style="list-style-type: none"> - Is the site within an area identified as a principal or secondary settlement in the draft Core Strategy? - Is the site in a location being promoted for employment growth in the draft Core Strategy of the LDF? - Is the site identified or likely to be required for a specific user or specialist use? - Is the site part of a comprehensive or long term development or regeneration proposal, which depends on the site being developed for employment uses? - Are there any other policy considerations, such as emerging strategic objectives or spatial vision, which should override any decision to release the site? <p>Is the site the only site available or part of a limited supply of land in the locality?</p>
Norwich	Acknowledges RSS policy	NA
South Norfolk	Acknowledges RSS policy and existing Local Plan policy	NA

Suffolk

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
Babergh	Yes, refers to draft RSS policy	Uses the 2002 regional sites study, to identify strategic sites, based on ten criteria: minimum size (10ha), financial incentives, competitive position, image/ profile, supply chain position, local market position, local facility provision, transport connectivity, workforce connectivity and ICT connectivity.
Forest Heath	Acknowledges RSS Policy	NA

Authority	Covers Strategic Employment Sites	Definition of Strategic Employment Sites
	but no further references in document	
Ipswich	Yes, refers to draft RSS policy	Uses the 2002 regional sites study, to identify strategic sites, based on ten criteria: minimum size (10ha), financial incentives, competitive position, image/ profile, supply chain position, local market position, local facility provision, transport connectivity, workforce connectivity and ICT connectivity.
Suffolk Coastal	Yes, refers to draft RSS policy	Uses the 2002 regional sites study, to identify strategic sites, based on ten criteria: minimum size (10ha), financial incentives, competitive position, image/ profile, supply chain position, local market position, local facility provision, transport connectivity, workforce connectivity and ICT connectivity.
Waveney	Acknowledges RSS Policy but no further references in document	NA

Appendix B

**Key Investment Drivers
and Demographics**

B1 Key Investment Drivers

The Regional Economic Strategy identifies seven areas that will drive change within the region: enterprise, innovation, the digital economy, resource efficiency, skills for productivity, economic participation and transport. Our analysis has highlighted three of these (innovation, transport and skills) as driven by public sector intervention and as particularly relevant for this exercise. These are explored in detail below:

B1.1 Innovation

The Regional Economic Strategy notes that:

“If the East of England is to thrive in the global economy, then it will increasingly be on the basis of ideas and knowledge and not cost.”

There are twelve universities and higher education facilities in the East of England. These are:

- Anglia Ruskin University (including the developing ARU Peterborough centre) ;
- Cranfield University;
- Norwich School of Art & Design;
- Royal Veterinary College;
- The Open University;
- University of Bedfordshire;
- University of Cambridge;
- University Campus Suffolk
- University of East Anglia;
- University of Essex;
- University of Hertfordshire; and
- Writtle College.

The continued development of these institutions, together with private research and development facilities is likely to drive innovation within the region.

B1.2 Transport

The Regional Economic Strategy notes that: *“To increase international competitiveness, investment and employment opportunities, the East of England’s transport network must enable the efficient and sustainable movement of people and goods.”*

RSS Policy T15 (Transport Investment Priorities) identifies the areas which are likely to come under increasing transport pressure as a result of underlying traffic growth and the development strategy – limiting the ability of the transport network to provide this role. Specifically, the areas identified are:

- The London to Ipswich corridor, including the Chelmsford and Colchester urban areas;
- Haven Gateway, including the Ipswich urban area;
- The London to Huntingdonshire corridor, including the Stevenage area;
- The Cambridge area;
- Essex Thames Gateway, including the London to Southend corridor;
- The Luton Dunstable Houghton Regis area;
- The London to Stansted corridor, including Harlow & access to Stansted Airport;
- Central Hertfordshire; and
- The Norwich area.

In this context, the following planned and potential projects are likely to act as important drivers for the region:

- East West Rail – a major project to establish a strategic railway connecting East Anglia with Central, Southern and Western England. If approved the line could eventually link

Felixstowe, Ipswich, Norwich, Cambridge, Letchworth, Bedford and Bletchley/Milton Keynes.

- Other Rail Capacity Improvements – particular focus on connections to London including the Thameslink Programme, and additional capacity on the East Coast, West Anglia, Great Eastern, Great Northern and West Coast main lines which run through the region;
- Stansted Capacity Increases – the existing infrastructure has potential to support a significant increase in passengers. Plans for a second runway, if implemented, could have a multiplicative effect on capacity;
- Road Improvements – a number of road capacity schemes are programmed for the region (including M1, M25, and A12), however VCR modelling shows that the trunk road network will continue to come under increasing strain due to growth planned within the region; and
- Increased Port Capacity – significance improvements in port capacity including a new facility on the Thames, and planned expansion at a number of ports including Felixstowe and Eastport. This is likely to place increasing pressure on existing road and rail infrastructure of the region.

B1.3 Skills

Despite the presence of a number of top Higher Education institutions and concentrations of internationally renowned knowledge economy activities the East of England performs poorly in skills compared to the national average. Table B.1 below notes that the region has higher than average concentrations of individuals with only NVQ Level 2 skills (equivalent to 5+ GCSEs at grade A*-C) and lower than average levels of individuals with NVQ Level 4+ skills (equivalent to degree level or above).

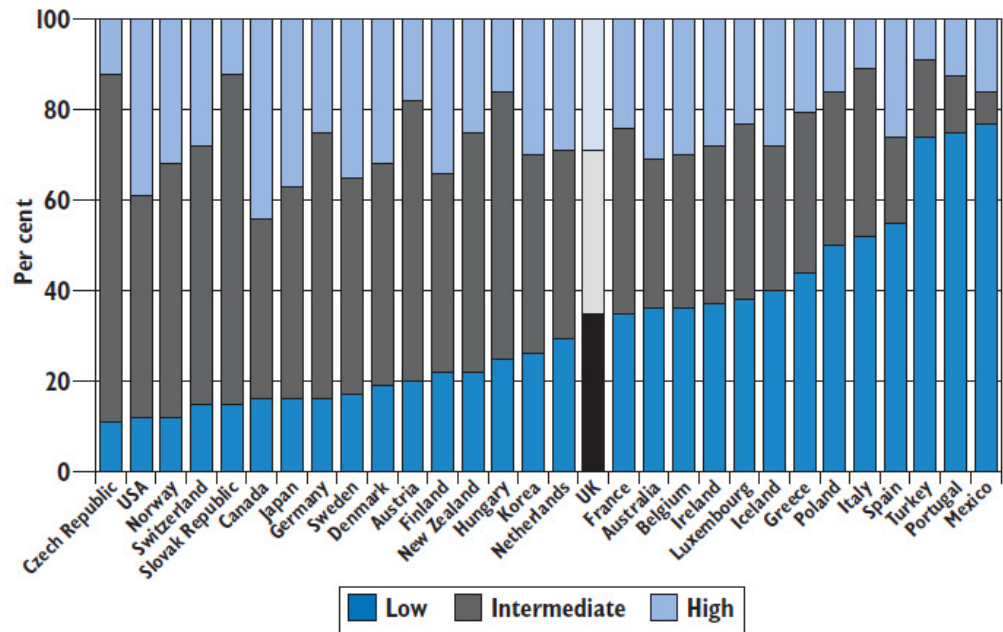
Table B1 Resident Population of Working-Age (16 to 59f/64m) by Highest Level of Qualifications Achieved, English Regions, 2006

Region	% with no qualification	% with NVQ1 only	% with NVQ2 only	% with NVQ3 only	% with NVQ4+	% with other qualifications
East	14.0	15.8	20.1	17.0	25.0	8.2
East Midlands	13.9	16.1	18.8	18.8	24.8	7.6
London	13.9	9.9	13.0	13.3	34.6	15.3
North East	14.3	15.1	21.3	20.0	22.7	6.5
North West	15.8	14.8	19.8	18.9	24.8	5.8
South East	9.6	14.7	18.6	19.0	30.5	7.7
South West	9.8	15.2	20.0	20.0	27.3	7.7
West Midlands	17.5	14.3	19.4	17.2	23.9	7.7
Yorkshire & the Humber	15.3	15.6	19.3	18.7	22.7	8.3
England	13.6	14.3	18.4	17.8	27.1	8.7

Source: ONS Annual Population Survey, as reported within the RES evidence base.

While performance is below national averages, this gap is modest and compared to international benchmarks – on a global scale the region should be viewed as a high skill area. Figure B1 shows the skills performance of the UK compared to OECD countries, which largely outperform developing countries.

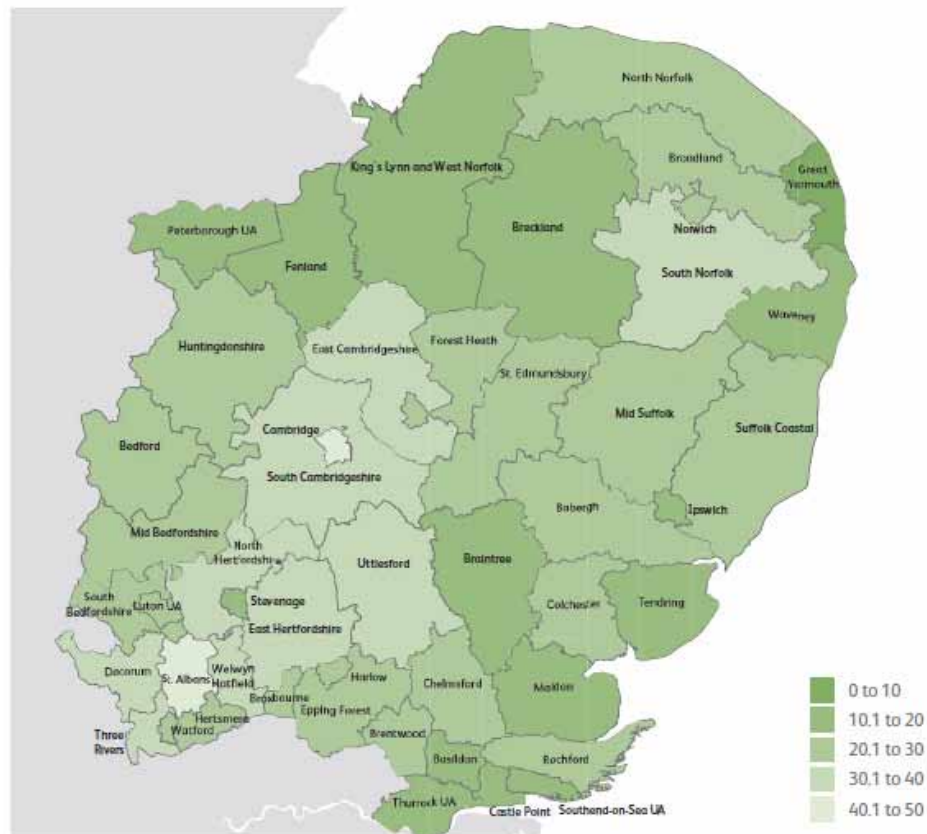
Figure B1 International Comparison of Skills Profiles



Source: Education at a Glance, OECD 2006, as reported in the Leitch Review of Skills

Of more relevance for this research, Figure B2 highlights considerable geographic variations in skills performance within the region. These range from Great Yarmouth (only 10% of the population hold NVQ Level 4 skills) to Cambridge (where the figure is closer to 50%). These variations are likely to have significant impacts on the types of activities that parts of the region can attract and support.

Figure B2 Percentage of Working-Age Population with Level 4+ Qualifications (2006)



Source: ONS Annual Population Survey, as reported within the RES evidence base.

B2 Demographics

Population Projection Based Predictions of Future Employment Needs

The East of England is expected to undergo significant growth in housing provision. These allocations will need to be matched by employment provisions within the labour market areas. Based on this, population projections for the region can be used to imply future employment needs. Table B2 presents a range of scenarios produced by Oxford Economics in 2008. These rely on different assumptions on migration and house building:

- A base case trend projections;
- A low migration projection assuming reduced rates of migration into the UK;
- A projection based on a declining average household size;
- A projection based on the RSS housing targets;
- A projection based on RSS housing targets 2006-2021 of 26,998 dwellings per annum, this rate was rolled forward after 2021;
- Two projections based on lower and upper estimates of average annual net additions to the housing stock from NHPAU;
- A GVA Growth projection based on the realisation of the productivity targets set out in the Regional Economic Strategy;
- A projection based on the GVA growth projections above, but with housing stock constrained to the RSS targets; and
- The Sub National Population Projection.

It should be noted that these projections are due to be updated at the end of April 2009.

Table B2 Alternative Projected Population Growth Scenarios 2008 - 2031

Scenario	Overall growth 2008-2031 (‘000s)
Population	
OE (Base)	1,226.23
OE (Low Migration)	1,085.75
OE (Low Household Size)	1,226.23
OE (RSS)	1,088.65
OE (NHPAU Low)	1,265.89
OE (NHPAU High)	1,704.10
OE (RES GVA)	1,409.45
OE (RES GVA and RSS housing)	1,088.95
2006-based SNPP	1,282.30

Source: Consultant's Analysis from Oxford Economics (2008) East of England: Joint Modelling for the RES and RSS

Appendix C

**Identified Sites and the
Long List**

C1 RES Identified Locations

While the RES does not specially identify strategic employment sites, it does pinpoint locations or potential locations with significant economic potential within each of the Engine's of Growth. These locations are summarised in Table C1.

Table C1 Identified Locations in the Spatial Geographies

Spatial Geography	Assets and Opportunities	Strategic Ambitions
Thames Gateway South Essex	<ul style="list-style-type: none"> Port of Tilbury London Gateway port development Lakeside basin retail cluster Basildon (major employment location) A127 Enterprise Corridor Southend-on-Sea (opportunity to be knowledge centre) London Southend Airport 	<ul style="list-style-type: none"> Develop London Gateway as a national logistics and enterprise hub Major reinvention of Lakeside Basin and West Thurrock Environment technologies and services centre based around automotive energy efficiency in Basildon and a new bioenergy park in Thurrock Niche creative industries centres at Thurrock and Southend-on-Sea Realise the potential of London Southend Airport Reinvent and revitalise the city and town centre in Southend-on-Sea, Basildon, Thurrock and Castle Point
Greater Cambridge Sub Region	<ul style="list-style-type: none"> University of Cambridge Genome Campus, Hinxton Laboratory of Molecular Biology (adjacent to Addenbrookes hospital) Babraham Institute Cambridge nanoscience Centre Bloodstock cluster at Newmarket 	<ul style="list-style-type: none"> Maintain the University of Cambridge as a top-five global university Support the growth of Anglia Ruskin University Deliver major new applied research and innovation facilities at East Forum and Addenbrookes Develop a stronger creative quarter in Cambridge Address the key strategic routes connecting Cambridge to regional and national markets, such as the A14 and rail route to London and Stansted
Greater Peterborough Sub- Region	<ul style="list-style-type: none"> Emerging proposal for 'inland port' Peterborough's Environment City status 	<ul style="list-style-type: none"> Renew the city centre and increase Peterborough's pull as a major retail centre Provide a university presence in Peterborough Expand the environmental technology cluster Secure increased inward investments in logistics and advanced services in Peterborough
Milton Keynes South Midlands Growth	<ul style="list-style-type: none"> London Luton Airport Cranfield University 	<ul style="list-style-type: none"> Butterfield Park, Luton Capability Green, Luton

Spatial Geography	Assets and Opportunities	Strategic Ambitions
Area	<p>University of Bedfordshire</p> <p>Milbrook Proving Ground</p> <p>National Institute of Research into Aquatic Habitats (NIRAH)</p> <p>Centre Parcs village</p> <p>UK Centre for Carnival Arts</p>	<p>Priory Business Park and i-lab, Bedford</p> <p>Next generation science park at Colworth</p> <p>Cranfield University Technology and Air Parks</p> <p>Continue growth of the University of Bedfordshire</p>
London Arc Sub-Region	<p>GlaxoSmithKline in Harlow/ Stevenage/ Ware</p> <p>Maylands, Hemel Hempstead</p> <p>Astrium, Stevenage</p> <p>Stansted Airport</p> <p>University of Hertfordshire</p> <p>Anglia Ruskin University</p> <p>Borehamwood and Leavesden- media studios</p> <p>Gunnels Wood, Stevenage</p> <p>Proposed Chelmsford Business and Technology Park Incubator</p>	<p>Expansion of the higher and further education offer focused upon the key centres</p> <p>Promote key transport corridors, including A12 and M11 corridor as economic drivers</p> <p>Continue growth of the University of Hertfordshire and Anglia Ruskin University</p>
Greater Norwich Sub-Region	<p>Norwich Research Park</p> <p>University of East Anglia</p> <p>Advanced automotive and engineering cluster and enterprise hub based at Hethel</p> <p>Norwich city retail centre</p> <p>Norwich International Airport</p>	<p>Strengthen Norwich as a leading medium-sized science city</p> <p>Improve the position of University of East Anglia in global university rankings</p> <p>Develop clusters at Norwich Research Park and Hethel</p> <p>Develop Norwich as a nationally important centre in financial and business services and creative industries</p> <p>Develop Norwich as an international exemplar of a low carbon city</p> <p>Increase linkages between Norwich International Airport, Amsterdam Schipol and other key international markets</p>
Haven Gateway Sub-Region	<p>Adastral park</p> <p>Felixstowe/ Harwich/ Ipswich and Mistley Ports</p> <p>University of Essex, Colchester</p> <p>Transport related hi tech engineering sector in Colchester</p> <p>Insurance and telecommunications sector in Ipswich</p>	<p>Martlesham (science based business park)</p> <p>Expansion at Felixstowe South and Bathside Bay</p> <p>Major reinvention of cities and town centres including Ipswich Waterfront, East Colchester, Harwich and Jaywick (regeneration priority)</p> <p>Develop cultural infrastructure such as International Centre of Excellence for Classical Music, Aldeburgh, Firstsite: newsite visual arts facility, Colchester</p>

Spatial Geography	Assets and Opportunities	Strategic Ambitions
		<p>and DanceEast (part of the Cranfield Mill development), Ipswich</p> <p>Develop Colchester Research Park (University of Essex)</p> <p>Develop University Campus – Suffolk</p>
Coastal Renaissance	<p>Eastport, Great Yarmouth</p> <p>Orbis Energy, Lowestoft</p>	<p>Expansion of existing higher and further education offer through existing colleges, with support from the University of East Anglia and University Campus Suffolk</p> <p>Develop the EastPort outer harbour</p> <p>Deliver major physical restructuring as set out in 1st East area action plan</p>
Market Towns	NA	<p>Maintain the East of England as the UK's leader in agriculture and food sector, supported by leading research centres of excellence and knowledge exchange</p>

C2 RSS Identified Locations

The RSS identifies broad locations where strategic employment sites should be identified (Policy E3) but does not identify specific locations. However, the Sub Areas and Key Centres for Development and Change profiles identify the key locations for growth for some of the sub areas.

Table C2 Locations for Growth

Sub Area	Specific Locations for Employment Growth
Bedfordshire	None
Cambridge Sub-Region	None
Essex Thames Gateway	Lakeside Basin
Haven Gateway	Container handling capacity at Bathside Bay and Felixstowe South Regeneration initiatives in Colchester – St. Botolphs, North Station, East and North Colchester and the Garrison Ipswich Waterfront and Village Harwich Clacton Jaywick Adastral Part, Martlesham Colchester Science Park
Norwich	Norwich City Centre Thorpe St Andrew and Longwater, Costessy business parks Expansion of the research park at Colney/Cringleford Norwich Airport Wymondham/A11 corridor
Peterborough	Working towards the provision of a university
Stevenage	A11 corridor
The London Arc	None

C3 ELR Strategic Employment Locations

A review of existing ELRs (Appendix C) in the East of England region revealed that 26 strategic employment sites have been identified, using a variety of definitions.

Table C3 Existing Identified Strategic Employment Sites in ELRs

Authority	Identified Strategic Employment Sites in ELRs
Luton	The ELR suggests that there is 'potential for development of strategic employment sites adjacent to Junction 11a and London Luton Airport'.
Cambridge	Addenbrooke's Hospital University North West of Cambridge site Northstowe Cambridge East North Cambridge (covering Cambridge Science Park)
Fenland	Strategic Employment Sites not identified in the ELR. However, the Structure Plan identified the following Strategic Employment Sites: <ul style="list-style-type: none"> - Chatteris - March Trading Park - South-west approach to Wisbech
Peterborough	Alwalton Hill (within Southern Expansion Land). (The Cambridgeshire and Peterborough Structure Plan 2003 (Policy P2/3) identified Hampton as a Strategic Employment Site).
South Cambridgeshire	Addenbrooke's Hospital University North West of Cambridge site Northstowe Cambridge East North Cambridge (covering Cambridge Science Park)
Colchester	Cuckoo Farm, Colchester Severalls Business Park University Research Park (Allocation) Whitehall Industrial Estate Whitehall Industrial Estate Expansion (Allocation) Tollgate (Allocation)
Rochford	Western Employment Area – Rawreth, Brook Road and Imperial Park Industrial Estates
Tendring	Bathside Bay, Harwich
Suffolk Coastal	Martlesham Heath Hi-Tech Cluster Site Felixstowe Port Development
Breckland	A1corridor – particularly around Attleborough and Snetterton – acknowledged in relation to its identification in the draft RSS and LDF Strategy and Core Policies document Reference to GVA Grimley Strategic Sites Study (2005) for Norfolk CC – which identified Thetford Business Park, RAF Watton and Snetterton and Circuit Heath as strategic sites
Broadland	Broadland Business Park(s) Identified in Broadland Local Plan 1998 - Acle, Aylsham, Hellesdon, Lenwade, Rackheath, Sprowston and Thorpe St Andrew
Great Yarmouth	Beacon Park recommended for designation as strategic employment site

Authority	Identified Strategic Employment Sites in ELRs
	Strategic employment site should be provided in Great Yarmouth to meet port expansion Waveney and Great Yarmouth ELS recommends that Beacon Park should be designated as a strategic employment site
Kings Lynn and West Norfolk	Hardwick Industrial Estate extension identified as an important strategic site for Kings Lynn
North Norfolk	Sites of 'high' strategic importance: <ul style="list-style-type: none"> - Cromer Holt Road - Cromer Retail Park - Fakenham Industrial Estate - Fakenham Commercial Park - Holt Industrial Estate - North Walsham Industrial Estate - North Walsham, Midland Road - North Walsham (HL foods and adjacent land) - North Walsham, General Trailers - Tattersett Business Park - Fakenham additional land at Clipped Bush Lane - Holt, Cromer Road
Norwich	Norwich Research Park
South Norfolk	Wymondham Gateway 11 Longwater area

Source: Consultants analysis of various ELRs (2008)

C4 Long List of Sites

C4.1 Bedfordshire & Luton

1. Arlesey/Stotfold/ Fairfield Park Business Park
2. Butterfield Business Park, Great Marlings
3. Capability Green, Luton
4. Cardington Cross, Cardington
5. Cardington Sheds, Cardington
6. Center Parcs, Millbrook
7. Century Park, Luton
8. Colworth Science Park, Sharnbrook
9. Cranfield University and Technology Park, Cranfield
10. East of Leighton Buzzard
11. Land East Stratton, Biggleswade
12. Luton Airport, Luton
13. Marsh Leys Regional Distribution Site, Kempston
14. Millbrook Proving Ground, Millbrook
15. Napier Park, Luton
16. NIRAH and Science Park, Marston Vale
17. North of Luton
18. Priory Business Park and iLab, Bedford
19. Rookery South, Marsden Vale
20. Sundon Quarry, Luton
21. Thurleigh Airfield, Thurleigh
22. Wixams new settlement, Bedford
23. Woodside Industrial Park
24. Wootton
25. Wyboston Lakes, Wyboston

C4.2 Cambridgeshire & Peterborough

26. Genome Campus, Hinxton
27. Addenbrookes 2020 Vision, Cambridge
28. Alconbury
29. Anglian Ruskin University, Peterborough
30. Babraham Research Campus, Cambridge
31. Brookfield Farm, Huntingdon
32. Cambridge East, Cambridge
33. Cambridge Science Park, Cambridge
34. East of St. Neots

35. Gateway Peterborough and Great Haddon, Peterborough
36. Granta Park, Cambridge
37. Great Stukeley
38. Hostmoore Commercial Park, March
39. Huntingdon West / Hinchingsbrooke Park, Huntingdon
40. Lancaster Way Business Park, Ely
41. Magna Park, Whittlesey
42. Northern Fridge East, Cambridge
43. Northstowe, near Longstanton
44. Red Brick Farm, Peterborough
45. Redevelopment of the South Bank, Peterborough
46. South East Chatteris, Chatteris
47. South West Wisbech / Weasenham Lane, Wisbech
48. University North West Cambridge, Cambridge
49. Wisbech Port / Mount Pleasant, Wisbech

C4.3 Essex, Southend-on-Sea & Thurrock

50. A127 Enterprise Corridor, Basildon New Town & Southend
51. Chelmsford Business Park, Chelmsford
52. Colchester Institute, Colchester
53. Cuckoo Farm, Colchester
54. East Colchester, Colchester
55. East of Pond Hall Farm, Ramsey, Harwich
56. Essex Regiment Way, Chelmsford
57. Firstsite, Colchester
58. Grays Town Centre Learning Campus and Grays Business Community Centre, Grays
59. Harwich International Port, Bathside Bay Container Terminal, Harwich
60. Lakeside Basin, Thurrock
61. Land NE Elsenham
62. London Gateway Port Development, Thurrock
63. London Southend Airport and its environs, Southend
64. London Stansted Airport, Generation 1 expansion, Stansted
65. London Stansted Airport, Generation 2 expansion, Stansted
66. Maltings Lane, Witham
67. North of Nortel, Harlow New Town
68. North-west Braintree, off Panfield Lane, Braintree
69. Port of Tilbury, Tilbury
70. Proposed Sites in North-East Chelmsford

71. Royal Opera House Production Campus & Creative National Skills Academy, Purfleet
72. Skyline 120 Business Park, Braintree
73. South of Country Park, Great Notley, Braintree
74. South West Canvey, Charfleets extension and Northwick Road, Canvey Island
75. Springfield Business Park, Chelmsford
76. Stane Park, Colchester
77. Stanway Strategic Employment Zone, Colchester
78. Temple Farm, Chelmsford
79. University of Essex Knowledge Gateway, Colchester

C4.4 Hertfordshire

80. Area of Search 1: South west of St Albans, St Albans
81. Area of Search 2: South east of St Albans, St Albans
82. Area of Search 4: South of London Colney, London Colney
83. Borehamwood & Elstree Studios, Borehamwood and Elstree
84. EADS Astrium, Stevenage
85. East of Buncefield, Hemel Hempstead
86. Former Radlett Aerodrome, Upper Clonde Valley
87. Glaxosmithkline Cluster, Stevenage, Ware and Harlow
88. Gunnels Wood, Stevenage
89. Knebworth Innovation Park, Stevenage
90. Leavesden Studios, Leavesden
91. Lister Hospital, Stevenage
92. Maylands, Hemel Hempstead
93. MBDA, Stevenage
94. Roehyde, Hatfield
95. Royston Road, Baldock
96. University of Hertfordshire, Hatfield

C4.5 Norfolk

97. Beacon Business Park, Great Yarmouth
98. British Sugar Site, King's Lynn
99. Broadland Business Park, Norwich
100. Deal Ground, Norwich
101. Fisons Way Extension, Thetford
102. Gapton Hall Industrial Estate Extension, Great Yarmouth
103. Hardwick Industrial Estate Extension, Kings Lynn
104. Hethel Engineering Centre, Hethel
105. Honingham Thorpe Farm, Colton

106. Longwater, Costessey
107. NORA, King's Lynn
108. Norwich Research Park and extension, Colney
109. Snetterton Circuit & Heath, Eccles
110. South Denes (East Port), South Denes
111. Thetford Enterprise Park, Thetford
112. Thetford North, Thetford
113. Utilities, Norwich
114. Watton Airfield, Watton
115. White House Farm, Saddlebow

C4.6 Suffolk

116. Adastral Park, Martlesham
117. Beach Industrial Estate, Lowestoft
118. Blofield Park, Felixstowe
119. Brantham Site, Brantham
120. Christmasyard's Wood, Felixstowe
121. Cranes site, Ipswich
122. DanceEast, Cranfield Mill, Ipswich
123. Eye Airfield Industrial Estate, Eye
124. Felixstowe South Reconfiguration, Felixstowe
125. Former British Sugar site Sproughton, Ipswich
126. Gisleham Industrial Estate, Lowestoft
127. Hanchet End Business Park, Haverhill
128. Haverhill Business Park, Haverhill
129. Innocence Farm, Trimley St Martin
130. IP8 Scrivener Drive, Ipswich
131. Ipswich Waterfront, Ipswich
132. Jaywick, Clacton-on-Sea
133. Lowestoft Power Park, Lowestoft
134. Moreton Hall Industrial Estate/ Suffolk Business Park, Bury St Edmunds
135. Orion Business Park, Great Blakenham
136. Ransomes Europark, Nacton
137. Shepherds Grove Industrial Estate, Stanton/ Hepworth
138. SnOasis, Great Blakenham
139. South of Lake Lothing, Lowestoft
140. Suffolk New College, Ipswich
141. Trinity Park, Ipswich

- 142. University Campus Suffolk (West Suffolk Campus), Bury St Edmunds
- 143. University Campus, Suffolk (Ipswich campus), Ipswich
- 144. Wherstead site nr Orwell Bridge, Ipswich

Appendix D

**Employment Site
Recommendations**

D1 Existing Sites with No Identified Future Capacity

Name and Location of Site	Recommendation
Bedfordshire and Luton	
Capability Green, Luton	A medium sized site and offering a competitive environment for modern employment sectors; however it has a general employment focus. The site is fully developed and is therefore unlikely to accommodate significant growth within the plan period. The site is highly accessible by public and private transport.
Marsh Leys Regional Distribution Site, Kempston	Not presently eligible for consideration as a strategic employment site. Site is now fully developed with no plans for future development. The site does not meet the strategic criteria.
Wyboston Lakes, Wyboston	Existing employment site with no identified future capacity. The site is now fully developed and unlikely to provide for significant growth within the plan period.
Woodside Industrial Park	This site is an existing local employment site accommodating a mix of business. The site is already fully occupied and no confirmed future capacity has been identified.
Cambridgeshire and Peterborough	
Genome Campus, Hinxton	A relatively large site with a strong economic focus and clearly defined future economic vision. The site is provides an attractive environment for biomedical research uses. However the site is largely developed and is therefore unlikely to accommodate significant growth within the plan period. The site is highly accessible by public and private transport.
Essex, Southend and Thurrock	
Colchester Institute, Colchester	The site is an important local facility and employment site, and has a clearly defined future vision. However the site is already under construction and no future further capacity has been identified. The site does not meet the strategic criteria.
Grays Town Centre Learning Campus and Grays Business Community Centre, Grays	Site already contains interim buildings although there are plans to replace this facility no other scope for expansion is identified and therefore there is no identified future capacity. Site does not meet the strategic criteria.
Hertfordshire	
Borehamwood & Elstree Studios, Borehamwood and Elstree	Small sites with a strong economic focus. The sites are largely developed and there is no clear vision for the future. Although sites may become available in the medium term, there is no clear future vision for the site. The sites are highly accessible by public and private transport.
EADS Astrium, Stevenage	The site is now fully occupied and although it may become available for future development in the plan period, however currently this is unconfirmed. The site does not meet the strategic criteria.
MBDA, Stevenage	The site is now fully developed and unlikely to provide for significant growth within the plan period. The site does not meet the strategic criteria.
University of	The site is substantially developed; no known future capacity for

Hertfordshire, Hatfield	expansion. The site does not meet the strategic criteria.
Norfolk	
British Sugar Site, King's Lynn	Site already under development, no further capacity identified. The site does not meet the strategic criteria.
Suffolk	
DanceEast, Cranfield Mill, Ipswich	The site is potentially an important local employment site, and has a clearly defined future economic vision. However the site is under construction and no future capacity had been identified. The site does not meet the strategic criteria.
Suffolk New College, Ipswich	The site is already under development and no further capacity identified. The site does not meet the strategic criteria.
Trinity Park, Ipswich	Fully developed leisure facility, no known future economic growth plans. Site does not meet the strategic criteria.

D2 Regional Strategic Sites

Name and Location of Site	Recommendation
Bedfordshire and Luton	
Butterfield Business Park, Great Marlings	The site has a clear focus on knowledge intensive industries and a vision to strengthen this position in future. The site is expected to contribute to the economic base of the region. The site is designated as an employment site and has secured outline consent for future growth. The site is well connected to strategic road and rail routes and is serviced by public transport.
Cranfield University and Technology Park, Cranfield	The site has a clear research focus and accommodates leading edge activities including those involved in life-sciences and biotechnology as well as the motorsport cluster as identified in RES policy E4. It contributes to the economic development of the region. The site is designated in local planning policy as a key employment site. The site is highly accessible by road and is well served by public transport.
Cambridgeshire and Peterborough	
Addenbrookes 2020 Vision, Cambridge	The site has a clear focus on clinical development and research uses and contributes to the life sciences regional super-cluster as identified in RES Policy E4. The site has a clear vision to become an international centre of excellence, and has aspirations to serve a global market. Development of this site is supported in current and emerging policy. The site offers high levels of accessibility by public and private transport.
Anglian Ruskin University, Peterborough	The site will have a clear research focus. The site will support the environmental technologies cluster identified within RES Policy E4. The site will be capable of providing sufficient employment to support a sub-regional labour catchment. The site will require support in emerging policy and high levels of accessibility by public and private transport.
Babraham Research Campus, Cambridge	The site accommodates leading edge activities involved in the development of the life sciences regional super-cluster as identified within RES Policy E4. These activities give the site a clear identity and a sharp economic focus. The site has a definite role to play in the

	economy of the wider region. The site offers high levels of accessibility by public and private transport.
Granta Park, Cambridge	This has a strong economic focus and clearly defined future economic vision. The site provides an attractive environment for the biotech sector and is highly accessible by public and private transport. The site has a planned extension that will significantly increase the floorspace.
Cambridge Science Park, Cambridge	A relatively large site with a strong economic focus and clearly defined future economic vision. The site is likely to provide an attractive environment for high technology research and development uses, taking advantage of its location in a cluster of high-tech firms. The site is highly accessible by private transport and will be well served by public transport following the implementation of the Cambridgeshire Guided Bus.
Essex, Southend and Thurrock	
A127 Enterprise Corridor, Basildon New Town & Southend	The site has a clear future economic vision that will contribute to the economy of the wider region. Development of the site is supported in emerging policy. The corridor is highly accessible by private transport and contains nodes of high public transport accessibility.
Hertfordshire	
Glaxosmithkline Cluster, Stevenage, Ware and Harlow	The sites have a clear research focus. The sites accommodate leading edge research within the life sciences regional super-cluster as identified within RES Policy E4. The cluster adds to the economic base of the region. The sites have a clear vision for future economic activity, linked to the GSK brand and life sciences research. The sites offer high levels of accessibility by public and private transport.
Norfolk	
Norwich Research Park and extension, Colney	The site has a clear economic focus and accommodates leading edge activities. It contributes to the life-science regional super-cluster as identified in RES Policy E4 and to the economic base of the region. The site has a clear future economic vision. Both sites offer high levels of accessibility by public (bus) and private transport.
Suffolk	
Adastral Park, Martlesham	The site contributes to the ICT/telecommunications cluster around Ipswich as identified within RES Policy E4. The site has a clear research function and the vision for the future development of this site focus on consolidating this. The site contributes to the economic base of the wider sub region. The site offers high levels of accessibility by public and private transport.

D3 Regional Gateway or Logistics Sites

Name and Location of Site	Recommendation
Bedfordshire and Luton	
Luton Airport, Luton	The site serves a strategic demand for passenger travel, and to a lesser extent freight distribution. The site has a clear vision to intensify use. Site is highly accessible by public and private transport.
Sundon Quarry, Luton	Site with a clearly defined future vision to contribute to the freight distribution demands of the sub region.
Cambridgeshire and Peterborough	
Magna Park, Whittlesey	The site will contain intermodal freight facilities and will meet a strategic demand for freight distribution. The site is highly accessible by public and private transport.
Essex, Southend & Thurrock	
East of Pond Hall Farm, Ramsey, Harwich	A medium sized site that is likely to offer a competitive environment for modern employment sectors; however the site has a general employment focus. The site will contribute to the vision and economic objectives for the Haven Gateway sub-region. The site is highly accessible by private transport.
Harwich International Port, Bathside Bay Container Terminal, Harwich	The site contains intermodal freight facilities and meets as strategic demand for freight distribution. The site has a clear vision to increase the ports cargo handling capacity. The site is highly accessible by public and private transport.
London Gateway Port Development, Thurrock	The site will contain intermodal freight facilities and meet a strategic demand for freight distribution. The site has a clear vision to create a multi-modal logistics and business park. Site is highly accessible by public and private transport.
London Southend Airport and its environs, Southend	The site serves a strategic demand for passenger and freight distribution. Site is highly accessible by public and private transport.
London Stansted Airport, Generation 1 expansion, Stansted	The site serves a strategic demand for passenger travel. The site has a clear vision to intensify use. Site is highly accessible by public and private transport.
London Stansted Airport, Generation 2 expansion, Stansted	The site serves a strategic demand for passenger travel. The site has a clear vision to intensify use. Site is highly accessible by public and private transport.
Port of Tilbury, Tilbury	The site contains intermodal freight facilities and meets as strategic demand for freight distribution. The site has a clear vision to increase the ports cargo handling capacity. The site is highly accessible by public and private transport.
Norfolk	
South Denes (East Port), South Denes	A large site with an existing focus on port related activity although supporting a range of employment. The vision for the site will mean that it is increasingly mixed employment. The site is largely developed with only a limited amount of undeveloped land; therefore the site is unlikely to accommodate significant growth in the plan period. The site is reasonably accessible by public and private transport.

Suffolk	
Blofield Park, Felixstowe	The site contains intermodal freight facilities and meets a strategic demand for freight distribution. The site is highly accessible by public and private transport.
Christmasyard's Wood, Felixstowe	The site has the potential to contain intermodal freight facilities and meet the strategic demand for freight distribution and storage. The site is highly accessible by public and private transport.
Felixstowe South Reconfiguration, Felixstowe	The site contains intermodal freight facilities and meets as strategic demand for freight distribution. The site has a clear vision to increase the ports cargo handling capacity. The site is highly accessible by public and private transport.
Innocence Farm, Trimley St Martin	Large site which has the potential to serve a sub regional distribution function. The site is highly accessible by private transport and reasonably accessibly by public transport.

D4 Sub Regional Strategic Sites

Name and Location of Site	Recommendation
Bedfordshire & Luton	
Colworth Science Park, Sharnbrook	A small site with a strong economic focus and clearly defined future economic vision. The site is likely to provide an attractive environment for high order R&D based employment. The majority of the site is already developed and planned expansion is already supported by intervention. Beyond existing plans to create an innovation centre, no further expansion potential is identified. The site is highly accessible by public and private transport.
Millbrook Proving Ground, Milbrook	The site contributes to the motor sports cluster as identified in RES Policy E4. The site has a clear focus for activity and offers niche employment supporting a sub regional scale labour catchment. The vision for this site aims to build on this focus. The site contributes to the economic base of the wider region. Development of the site is supported in emerging policy.
NIRAH and Science Park, Marston Vale	A large site with a strong focus and clearly defined future vision. The science park will have a more than local focus, given its role as a national centre for research. Although containing a significant leisure component, this site also offers this site also offers research and education facilities. The site is highly accessible by public and private transport.
Priory Business Park and iLab, Bedford	A medium sized site offering a competitive environment for modern employment sectors. The site is largely developed and some potential still remains. The site is highly accessible by public and private transport.
Wixams new settlement, Bedford	The site has the potential to provide high quality employment space for modern employment sectors. Will help to contribute to the creation of a sustainable community.
Cambridgeshire and Peterborough	
Alconbury	Potentially an important sub regional strategic site however there is currently no definite focus for economic activity.

Cambridge East, Cambridge	Potentially an important new mixed use area providing a variety of local employment opportunities. Will help create a sustainable community. There is growth capacity within Cambridgeshire for Research and Development.
East of St. Neots	A medium sized site with a clearly defined future economic vision. The site is likely to provide an attractive environment for consultancy and high tech sectors, taking advantage of its location in a cluster of high-tech firms. The employment uses on the site will help to create a sustainable community. The site is highly accessible by public and private transport.
Gateway Peterborough and Great Haddon, Peterborough	A medium sized site for modern employment sectors; however the site has a general employment focus. Will contribute to the creation of a sustainable community. The site is well located on the strategic road network.
Hostmoore Commercial Park, March	The site is an important site providing general employment in a regeneration area.
Huntingdon West / Hinchingsbrooke Park, Huntingdon	A small site with a strong economic focus and clearly defined future economic vision. The site is likely to provide an attractive environment for high value manufacturing. The site is highly accessible by public and private transport.
Lancaster Way Business Park, Ely	Large site with an established role in warehousing and distribution. The vision for the site will mean that it is increasingly focused on high value manufacturing. The site is highly accessible by public and private transport.
Northstowe, near Longstanton	Large site with potential to provide high quality employment space for modern employment sectors. Will help to create a sustainable community. Good accessibility by public and private transport.
Red Brick Farm, Peterborough	A large site with potential to become an important sub regional strategic site however there is currently no definite focus for economic activity. Reasonable public and private transport accessibility.
Redevelopment of the South Bank, Peterborough	The site will help to meet the RSS requirement for regeneration in Peterborough.
South West Wisbech / Weasenham Lane, Wisbech	A large site with the potential to focus on the agricultural / food industry, however currently not all employment conforms to this vision and the site therefore contains general employment uses. The site is highly accessible by private transport and reasonably accessible by public transport.
University North West Cambridge, Cambridge	A relatively small site with a strong economic focus and clearly defined future economic vision. The site is likely to provide an attractive environment for high order R&D based employment. The site is highly accessible by public and private transport.
Essex, Southend & Thurrock	
Cuckoo Farm, Colchester	Large site which will provide mixed use employment. The site has good access to the strategic road network.
Chelmsford Business Park, Chelmsford	The site is likely to offer a competitive environment for modern employment sectors. The site has a clearly defined future economic vision.

Lakeside Basin, Thurrock	A large site which is likely to be developed as mixed use, the site does not have a clear economic focus. The site is highly accessible by private transport and relatively accessible by public transport.
South West Canvey, Charfleets extension and Northwick Road, Canvey Island	Site with the potential to focus on environmental technologies; however the site will also accommodate a range of other employment uses. The site will contribute to the vision and economic objectives for the Thames Gateway sub-region, but is unlikely to contribute to the economic development of the region. The site is reasonable accessible by private and public transport.
Hertfordshire	
Gunnels Wood, Stevenage	The site is already developed. There is no clear economic focus with a complete mix of business sectors represented on the site. AAP is being drafted to guide the future redevelopment of the site; redevelopment is likely to be a gradual process and therefore the site is unlikely to significantly contribute to the economic development of the region; however it may contribute to the regeneration of Stevenage.
Knebworth Innovation Park, Stevenage	A medium sized site that has a clear economic vision for the future. The site is likely to provide an attractive environment for high order, modern employment sectors. The site is highly accessible by public and private transport.
Leavesden Studios, Leavesden	A small site with a strong focus and clearly defined future vision. The site is likely to provide strategic employment opportunities in the film/media industry. However due to its scale it is unlikely to significantly contribute to the economic development of the region. The site is highly accessible by public and private transport.
Maylands, Hemel Hempstead	A large site that is likely to offer a competitive environment for modern employment sectors; however the site currently has a general employment focus. The site is largely developed although redevelopment potential has been identified, which will be guided by a masterplan. The site is highly accessible by public and private transport.
Norfolk	
Broadland Business Park, Norwich	A large site offering a prime office space and a competitive environment for multi-media companies. The site had a future economic vision to expand the park, however it is unlikely to significantly contribute to the economic development of the region. The site is highly accessible by public and private transport.
Hethel Engineering Centre, Hethel	A small site with a strong economic focus. The site provides an attractive environment for high tech engineering sectors. The site is highly accessible by private transport, but has limited availability by public transport.
Suffolk	
Former British Sugar site Sroughton, Ipswich	A medium sized site which is likely to be developed as a storage and distribution function meeting the needs of expanding local ports.
Lowestoft Power Park, Lowestoft	A medium sized site with a clear future economic vision. The site is likely to provide strategic employment opportunities in the traditional energy and renewable energy sectors. However due to its scale it is unlikely to significantly contribute to the economic development of the region. The site is reasonably accessible by public and private transport.

Moreton Hall Industrial Estate/ Suffolk Business Park, Bury St Edmunds	The site is an important local site with general mixed use but does not have a clear future economic vision.
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D5 Local Employment Sites

Name and Location of Site	Recommendation
Bedfordshire and Luton	
Arlesey/Stotfold/ Fairfield Park Business Park	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
Cardington Cross, Cardington	Potentially a general employment uses site, providing important local employment opportunities but lacking a clear economic vision. The site does not meet the strategic criteria.
Cardington Sheds, Cardington	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
Center Parcs, Millbrook	Primarily a leisure site, offering some local employment. Does not meet the strategic criteria.
Century Park, Luton	A large site, which could provide general employment opportunities. Accessibility is a key issue to be addressed. The site does not meet the strategic sites criteria.
East of Leighton Buzzard	This site is potentially an important local employment site but does not have a clear future vision. This site does not meet the strategic criteria.
Land East Stratton, Biggleswade	Potential general employment use site providing important local employment opportunities but lacking a clear economic vision. The site does not meet the strategic criteria.
Napier Park, Luton	Important regeneration site, which will be developed as mixed use. However, there is not clear economic focus and it is unlikely to significantly contribute to the economic development of the region. Site does not meet strategic criteria.
North of Luton	This is potentially an important site and could provide freight capacity, as well as help create a sustainable community. However, at this point in time, there is no clear vision or economic focus for the site. It does not meet the strategic criteria.
Rookery South, Marsden Vale	Potentially an important site fulfilling a need for local renewable energy infrastructure. Site does not meet the strategic criteria.
Thurleigh Airfield, Thurleigh	Site currently used for leisure activity however future plans for the site comprise of general employment uses. The site does not meet the strategic criteria.
Wootton	Site with potential to become a mixed use scheme with general employment. The site will help create a sustainable community but the total employment component of the site is reasonably small. The site does not meet the strategic criteria.
Cambridgeshire and Peterborough	
Brookfield Farm,	The site is potentially an important local employment site but does not

Huntingdon	have a clear future economic vision. Site does not meet strategic criteria.
Great Stukeley	The site is potentially an important local employment site but does not have a clear future economic vision, general mixed uses planned. The site does not meet the strategic criteria.
South East Chatteris, Chatteris	The site is potentially an important local employment site but does not have a clear future economic vision. Site does not meet the strategic criteria.
Wisbech Port / Mount Pleasant, Wisbech	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
Essex, Southend and Thurrock	
East Colchester, Colchester	Potentially an important new mixed use area providing a variety of local employment opportunities but unlikely to contribute to the economic development of the region. Site does not meet strategic criteria.
Essex Regiment Way, Chelmsford	The site is potentially an important local employment site but does not have a clear future economic vision and is unlikely to accommodate significant growth in the plan period. Site does not meet strategic criteria.
Firstsite, Colchester	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. Site does not meet strategic criteria.
Land NE Elsenham	The site is potentially an important local employment site and would help create a sustainable community but does not have a clear future economic vision. The site does not meet the strategic criteria.
Maltings Lane, Witham	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
North of Nortel, Harlow New Town	The site is potentially an important local employment site but does not have a clear future economic vision. Site does not meet strategic criteria.
North-west Braintree, off Panfield Lane, Braintree	Potential general employment site, providing important local employment opportunities but lacking a clear economic vision. Site does not meet strategic criteria.
Proposed Sites in North-East Chelmsford	Potential new mixed use site including general employment uses providing important local employment opportunities but lacking a clear economic vision. Site does not meet strategic criteria.
Royal Opera House Production Campus & Creative National Skills Academy, Purfleet	A small site with a strong focus and clearly defined future vision. However due to its scale it is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
Skyline 120 Business Park, Braintree	The site is potentially an important local employment site but does not have a clear future economic vision and is unlikely to accommodate significant growth in the plan period. Site does not meet strategic criteria.
South of Country Park, Great Notley, Braintree	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. Site

	does not meet strategic criteria.
Springfield Business Park, Chelmsford	The site is potentially an important local employment site, however is unlikely to significantly contribute to the economic development of the region. Does not meet strategic criteria.
Stane Park, Colchester	The site is potentially an important local employment site, and has a clearly defined future vision for mixed use employment. However this is unlikely to significantly contribute to the economic development of the region. Does not meet strategic criteria.
Stanway Strategic Employment Zone, Colchester	The site is potentially an important local employment site, and has a clearly defined future vision for mixed use employment. However this is unlikely to significantly contribute to the economic development of the region. Does not meet strategic criteria.
Temple Farm, Chelmsford	The site is potentially an important local employment site but does not have a clear future economic vision and is unlikely to accommodate significant growth in the plan period. Site does not meet strategic criteria.
University of Essex Knowledge Gateway, Colchester	The site will potentially become a mixed use development accommodating general employment uses. The focus on the university is narrow and does not have much economic potential. The site does not meet the strategic criteria.
Hertfordshire	
Area of Search 1: South west of St Albans, St Albans	The site does not have a clear future economic vision and is more likely to be used for housing development. The site does not meet the strategic criteria.
Area of Search 2: South east of St Albans, St Albans	The site does not have a clear future economic vision and may be used for housing development. The site does not meet the strategic criteria.
Area of Search 4: South of London Colney, London Colney	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
East of Buncefield, Hemel Hempstead	The site is potentially an important local employment site for warehousing. At this stage the site only a potential option for direction of growth at Hemel Hempstead. Therefore future capacity is uncertain. The site does not meet the strategic criteria.
Former Radlett Aerodrome, Upper Clone Valley	The site is potentially an important local employment site but development proposals do not meet the strategic criteria. The site does not appear to be consistent with planning or transport policy. It is not supported by the local authority.
Lister Hospital, Stevenage	Important local facility and employer but does not meet the strategic criteria.
Roehyde, Hatfield	A potential growth location for St Albans but does not have a clear future economic vision. The site does not meet the strategic criteria.
Royston Road, Baldock	A potential growth location for Baldock but does not have a clear future economic vision. The site does not meet the strategic criteria.
Norfolk	

Beacon Business Park, Great Yarmouth	The site is potentially an important local employment site but does not have a clear future economic vision that will contribute to the future economic development of the region. The site does not meet the strategic criteria.
Deal Ground, Norwich	Site with potential to become a mixed use scheme with general employment. However it is unlikely to significantly contribute to the economic development of the region although it offers regeneration potential. The site does not meet the strategic criteria.
Fisons Way Extension, Thetford	A general employment site providing local employment. No clear economic vision. Site does not meet the strategic criteria.
Gapton Hall Industrial Estate Extension, Great Yarmouth	The site is potentially an important local employment site but unlikely to provide for significant growth within the plan period. The site does not meet the strategic criteria.
Hardwick Industrial Estate Extension, Kings Lynn	Potentially an important site for general employment uses but does not have a clear economic vision. Site does not meet the strategic criteria.
Honingham Thorpe Farm, Colton	Currently in mixed employment use. Potentially a site for as Norfolk food hub although only one of a number of potential sites. Does not meet the strategic criteria.
Longwater, Costessey	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
NORA, King's Lynn	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
Snetterton Circuit & Heath, Eccles	Site with a strong economic focus and clearly defined future economic vision. The site is likely to provide employment opportunities in the motor sports industry; however it is unlikely to significantly contribute to the economic development of the region.
Thetford Enterprise Park, Thetford	Potentially an important local general employment site but is unlikely to accommodate significant growth in the plan period. Site does not meet the strategic criteria.
Thetford North, Thetford	Potentially an important site for general employment uses but does not have a clear economic vision. Site does not meet the strategic criteria.
Utilities, Norwich	Site with potential to become a mixed use scheme with general employment. However it is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
Watton Airfield, Watton	The site will potentially become a mixed use development accommodating general employment uses; however there is no clear economic vision and the site is unlikely to accommodate significant growth in the plan period. The site does not meet the strategic criteria.
White House Farm, Saddlebow	The site is potentially an important local employment site but does not have a clear future economic vision and is unlikely to accommodate significant growth in the plan period. Does not meet strategic criteria.
Suffolk	

Beach Industrial Estate, Lowestoft	The site is substantially developed. There may be further scope of intensification of use although this potential may be limited. The site is currently used for a range of general employment uses and does not have a clear future economic vision. The site does not meet the strategic criteria.
Brantham Site, Brantham	The site is substantially developed for general employment use, providing important local employment opportunities. There is scope for redevelopment of vacant units but there is no clear economic vision. The site does not meet the strategic criteria.
Cranes site, Ipswich	There is no clear future economic vision for this vacant site. The site does not meet the strategic criteria.
Eye Airfield Industrial Estate, Eye	The site is substantially developed, however there may be further scope of intensification/change of use. However this is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
Gisleham Industrial Estate, Lowestoft	A potentially general employment uses site providing important local employment opportunities but lacking a clear economic vision. The site does not meet the strategic requirements.
Hanchet End Business Park, Haverhill	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
Haverhill Business Park, Haverhill	The site is potentially an important local employment site but does not have a clear future economic vision or primary economic focus. The site does not meet the strategic criteria.
IP8 Scrivener Drive, Ipswich	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
Ipswich Waterfront, Ipswich	A large site which is likely to be developed as mixed use. The site does not have a clear economic focus and only limited employment will be created. The site does not meet the strategic criteria.
Jaywick, Clacton-on-Sea	No clear economic vision or focus for the site. The site does not meet the strategic criteria.
Orion Business Park, Great Blakenham	The site is largely developed as a general mixed use business park. The site does not meet the strategic criteria.
Ransomes Europark, Nacton	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.
Shepherds Grove Industrial Estate, Stanton/ Hepworth	There is no clear economic vision for the site. The site does not meet the strategic criteria.
SnOasis, Great Blakenham	Primarily a leisure site, offering some local employment. The site does not meet the strategic criteria.
South of Lake Lothing, Lowestoft	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.

University Campus Suffolk (West Suffolk Campus), Bury St Edmunds	The site is potentially an important local employment site, and has a clearly defined future economic vision. However this is unlikely to significantly contribute to the economic development of the region. The site does not meet the strategic criteria.
University Campus, Suffolk (Ipswich campus), Ipswich	The site is potentially an important local employment site, and has a clearly defined future economic vision. Phase 1 and 2 complete/under construction. The site does not meet the strategic criteria.
Wherstead site nr Orwell Bridge, Ipswich	The site is potentially an important local employment site but does not have a clear future economic vision. The site does not meet the strategic criteria.

Appendix E

Regional Strategic Sites

E1 Regional Strategic Sites

E1.1 A127 Enterprise Corridor, Basildon & Southend

E1.1.1 Overview

The A127 is an important employment corridor, providing a range of business accommodation in a series of industrial estates. It is home to some of the biggest global companies, such as Ford, Case New Holland, SELEX and Visteon.



E1.1.2 Site Description

The A127 corridor comprises of a number of employment areas on and close to the A127 road between Basildon and Southend. It therefore straddles these two local authority areas. In Basildon the corridor is split across five zones: Cranes Farm Road, Festival Leisure Park, Pipp's Hill, Southfields and Burnt Mills. These include over 15 million square feet of commercial floorspace covering 650ha, hosting over 8,000 businesses employing over 40,000 people. In Southend accommodation is concentrated on five parks (Progress Road, Airborne, Thanet Grange, Prittlebrook Estate, Temple Farm/Stock Road).

Current provision is dominated by low quality and general industrial and business activity (B1/B2/B8) accommodation. Estates are characterised by a lack of public realm investments and lack any consistency of use. Despite this typically poor general condition users include a number of companies engaged in advanced engineering activities.

E1.1.3 Vision and Economic Focus

The vision for the area is to offer a quality economic space, and to attract higher value added activities – innovation, research and development and advanced manufacturing.

It is anticipated that provision will continue to support B2 and B8 activities housed in 'high door' premises (catering for loading and unloading of goods, rather than office accommodation). However, in contrast to existing provision, the redeveloped sites will cater for specific business activities or sectors. Specific local sectoral needs are currently under review within Southend's ongoing Employment Land Review Process.

E1.1.4 Policy Context

The economic importance of the A127 corridor is highlighted within the Southend Core Strategy. The need to refit and refurbish accommodation is identified as critically important in meeting housing and job growth targets, particularly given the severely limited availability of alternate supply.

Renaissance Southend's regeneration framework also notes the need to invest in new state of the art industrial and warehouse premises to expand the employment generating possibilities along the A127 as well as linking with the business corridor westwards into Basildon. The Basildon Renaissance Partnership is currently preparing a development framework in order to set out the long-term vision for the A127 corridor.

E1.1.5 Market Considerations

An Employment Land Review for Southend is currently in progress and the draft report is due imminently. The local authority has indicated that early results suggest that this site is expected to evidence a strong demand for employment sites, considerably in excess of likely supply. This is likely to create a strong demand for any refurbished accommodation created within this corridor.

E1.1.6 Recommendations/ Key Actions for Delivery

Delivery will largely involve the refitting, regeneration and remodelling of the existing stock. An important aspect of this will include breaking up of the large plots currently available in order to offer smaller development sites. The Fossets Farm site (previously safeguarded land) is also to accommodate employment.

Delivery is likely to require public sector involvement to support the relocation of existing firms before regeneration can occur.

E1.1.7 Risks

There is a risk that, despite strong identified demand for employment sites, the redeveloped provision may not attract higher-end users who will be able to best exploit the improved accommodation, and external economies of scale associated with the sharper focus of the redeveloped sites. Careful management of both the regeneration process (the relocating existing tenants in particular) and the attraction of new users may minimise this risk.

Much of the A127 corridor is characterised by poor bus network catchments. There is a risk that development will be heavily car focused. This may be minimised if sites are developed in line with plans for South Essex Rapid Transit (SERT), and can be located within easy walking distance of planned stops.

E1.2 Adastral Park, Martlesham

E1.2.1 Overview

Adastral Park is a regional centre of excellence for information and communications technology (ICT). The site has been functioning as BT's global R&D centre for more than forty years, and their global and national networks are run from this location on a 24/7 basis. In addition to BT there are 26 other firms co-located on the site, including high tech multi-nationals. All of the businesses located on the site have a telecoms focus, although the nature of their activity ranges from marketing to venture capital. There are currently around 4,000 jobs on the site, which are primarily in computing and telecoms.



Around 8/9 years ago, BT established an incubator hub for spin out companies within BT. This concept is now evolving with the development of an Innovation Hub and Innovation Martlesham.

- Innovation Hub: The first phase of this project involved the refurbishment of an existing building on the site for small business units. The second phase involves BT providing an acre of land, which will provide 28,000 sq.ft of accommodation to start up businesses. The programme is being jointly funded by EEDA, Haven Gateway Partnership, Suffolk County Council and Suffolk Coastal District Council. This accommodation plus associated business start up support will be available to all ICT start up firms not just those from within BT.
- Innovation Martlesham: This seedbed industrial programme is a joint initiative by BT and East of England Development Agency (EEDA), working in an informal partnership with Suffolk County Council, Suffolk Coastal District Council and other agencies, to promote

the development of the high-tech cluster centred on Adastral Park. To date eleven companies have been accommodated on the site under this initiative, which are involved in a variety of activities. It is possible that in the longer term, that the Innovation Hub will be brought under the Innovation Martlesham umbrella.

In addition to these innovation programmes, BT is also involved in a joint venture with five educational institutions: University College London, University of Essex, University of East Anglia, University of Suffolk and Suffolk New College; to run Innovation for the Digital Economic Age (IDEA). This programme aims to address wider issues around education and ITC and the need to address skills shortages, by offering young adults working for small and medium enterprises (SMEs) in the east of England the chance to gain a qualification in information communication technology (ICT) through apprenticeships.

E1.2.2 Site Description



Located in Suffolk Coastal District to the west of the A12 at Martlesham, the site is bounded on two sides by Martlesham Heath Business Park and housing. Greenfield land surrounds the remainder of the site.

The site is clearly delineated with a security fence bounding the current operational area (100 acres). Adastral Park is home to a major complex of buildings. The site has an attractive green setting, although it lacks a coherent image with a complete mix of building stock of varying ages and styles. There are a range of amenities on the site, primarily provided in 'the hub', which is a communal area of the site offering a restaurant, coffee lounge, and a well being clinic amongst other services.

E1.2.3 Vision and Economic Focus

Combining optical technologies, digital, switching through to work in advanced software techniques and protocols Adastral Park is a leading centre of technical innovation in communications. Adastral Park is considered to be of vital importance in terms of improving the employment and skills offer in the whole of Suffolk both on the site itself and in terms of spin off companies associated with the operations at Martlesham.

BT have established a comprehensive masterplan for the site, which offers a 20 year vision for the site to create a sustainable 21st Century community providing both jobs and homes. The masterplan includes a consolidation of the current operations on site and intensification of use, plus development of the wider surrounding land owned by BT. An outline planning application was submitted in September 2008 (imminently due to be resubmitted).

Proposed Masterplan



Source: http://www.adastralvision.com/image_library.html, accessed 08/04/2009

The proposals for the new 350 acre site include:

- Upgrades to existing employment floorspace and the creation of up to 60,000 square metres of new employment floorspace;
- A residential community of up to 2,000 new homes alongside Adastral Park;
- Comprehensive new infrastructure and services to serve the new residential community, including new education and healthcare provision, public transport, shops, leisure & sports facilities and public spaces;
- A hotel to cater for business visitors and tourists;
- An on-site energy centre to provide renewable heat and power, reducing the site's dependency on the National Grid;
- Significant development of the existing transport infrastructure, including improved A12 access; and
- An expansion of the University presence at Adastral Park.

If the planning application is approved and the development goes ahead, BT estimates that up to an additional 2,000 jobs will be created on the site. The majority of this employment will be in ICT, although some ancillary uses will also offer employment opportunities, such as the proposed 4* hotel.

The BT and EEDA joint vision for Innovation Martlesham is as follows:

- The provision of flexible innovation space for high-tech ICT related knowledge-based enterprises
- Linked to Adastral Park to create the largest concentration of ICT related R&D companies in the UK and develop a national and international identity
- An open 'campus' feel environment with Higher Education Institutes research presence to encourage and stimulate knowledge transfer and innovation

- Provision of added value services such as meeting / conference rooms, state of the art ICT connectivity, office services, innovation / knowledge transfer services, seminars and park management to stimulate commercialisation of R&D and growth
- Occupiers to have access to BT's Hub, visitor centre, meeting / seminar rooms, Intellectual Property library and equipment via a negotiated agreement

E1.2.4 Planning Policy Context

Martlesham Heath Industrial Estate comprising the industrial area at Martlesham Heath together with the adjoining BT complex, is identified as a General Employment Area in the adopted Suffolk Coastal Local plan (March 2006) and thus suitable for B1, B2 and B8 employment (Policies AP51 and AP216).

In recognition of the RSS requirements for strategic employment sites to be identified within the Haven Gateway, Adastral Park has subsequently been identified as contributing to a Strategic Employment Area (policy SP21) of regional significance in the Core Strategy Preferred Options Paper (December 2008). Adastral Park is thus identified as a location for growth as part of the Martlesham Business Campus. The Core Strategy Preferred Options Paper also identifies the area around Adastral Park as its preferred direction of growth for housing, which aligns with the proposed planning application for the site. Suffolk Coastal District Council is working towards the adoption of a Supplementary Planning Documents to cover Adastral Park and adjoining areas.

Strategic Policy SP21 – Employment Land

The Core Strategy will make provision for at least 8.5 hectares of employment land within the district, creating at least 8000 new jobs as a contribution to the Regional Spatial Strategy requirements for the Haven Gateway sub-region. Two areas are identified as Strategic Employment Areas. These have a regional significance and the Council will support the retention, expansion and consolidation of these areas subject to conformity with the remainder of the strategy:

1. Felixstowe Port; and
2. Martlesham Heath Business Campus, including Adastral Park

In respect of Martlesham Heath the opportunity is available to create a high-tech business cluster and this will be supported.

Elsewhere across the District there are a number of employment areas that are significant at the district level. These are identified as General Employment Areas and will be identified in the Site Specific Local Development Document and will be shown on the Proposals Map. The appropriate uses in general employment areas will normally be B1, B2 and B8 uses unless specified in specific policies Other ancillary uses such as take away food, nurseries/crèche, and leisure may be appropriate if the primary purpose is to provide a service to local workers and not a wider area. The strategy of creating new employment land will be complemented by one of protecting existing land.

Source: Suffolk Coastal Core Strategy Preferred Options

E1.2.5 Market Considerations

There is no apparent commercial reason why the development of the land owned by BT Group should not take place. The vision to develop an incubator hub is shared by BT and wider regional partners, such as EEDA, Suffolk County Council and Suffolk Coastal District Council, thus the impetus and the delivery mechanisms are already in place to help ensure that this development can take place. A small parcel of land, in the wider site, is owned by a third party, Grainger Trust. However, they are apparently on board with the proposed development.

E1.2.6 Recommendations/ Key Actions for Delivery

The key delivery issues for the future growth of the site relate to infrastructure, in particular power and transport. The planning application includes proposals to improve A12 junctions, as well as identifying a site for a renewable energy plant. Power is a critical issue for the site

and capacity constraints have already previously nearly constrained development on site. The Haven Gateway Integrated Development Programme (IDP, December 2008) notes that the electricity supply to Martlesham, including Adastral Park, is 'simply insufficient in relation to the scale of planned growth. Discussions are ongoing with EDF but timing of major new investment has still to be resolved.'

Some of the individual buildings on the site appear to be coming towards the end of their functional life. However, this issue should be addressed as part of BT's masterplan proposals. It will be important for BT to keep investing in the building stock, if the site is to maintain its position as an international centre of technological excellence and remain competitive in a global market.

E1.2.7 Risks

Development of the site is strongly supported by all sectors. The project is endorsed in local planning policy thereby reducing risks to its delivery. However, the Haven Gateway IDP has identified a number of risks or uncertainties regarding the future development of this site:

- A need for public funding to support the future growth of Innovation Martlesham;
- Risks and uncertainties linked to the exploitation of science and an unwillingness on the part of the private sector to invest in the surrounding physical business infrastructure; and
- Issues around externalities where the public benefits deriving from clustering are far greater than the private gain through development.

Macro economic conditions, in relation to ICT activities, may present a risk to the development of the site. However, this is likely to be limited to timing of development rather than an overall impediment given the long term nature of the Masterplan.

E1.3 Addenbrookes 2020 Vision

E1.3.1 Overview

Addenbrooke's is a large teaching hospital located to the south of Cambridge City Centre. The hospital has 1100 beds and is the largest employer in Cambridgeshire with over 6500 staff. The hospital is part of the Cambridge Biomedical campus. The hospital is run by the Cambridge University Hospitals NHS Foundation Trust and is the location for Cambridge University's medical school.

Addenbrooke's currently houses a mix of public health, research and academic facilities. Addenbrooke's provides an extensive range of emergency, surgical and medical services for people living in the Cambridge area as well as being a centre of excellence for regional specialist services for organ transplantation, cancer, neurosciences, pediatrics and genetics. In 2007 the Trust scored 'excellent' for the quality of services and 'excellent' for the use of resources in the Healthcare Commission's annual Health. The rating identifies the hospital as one of the best in the country.

E1.3.2 Site Description

Addenbrookes is home to a major complex of buildings which dominate the area south of Cambridge. The buildings are a wide range of ages and styles, and the appearance of the majority of buildings on site is dictated by their purpose. Buildings in the centre of the site, e.g. the main entrance, tend to be older brick buildings. These are adjacent to more modern buildings around the edge of the site. There is very limited green space and landscaping within the site, although it is surrounded by open farmland in two sides.



There are a number of major research institutes in and around the site, including the Wolfson Brain Imaging Centre, the MRC Laboratory of Molecular Biology, the Cambridge Institute for Medical Research, the MRC Dunn Human Nutrition Unit, the MRC Centre for Protein Engineering, the Regional Blood Transfusion Centre, the Addenbrooke's Centre for Clinical Investigation and the Cambridge/Hutchison/Cancer Research UK Centre.

There are a wide range of amenities on site including a shopping concourse, food court, sports centre, and accommodation units. There are also over 800 residential units on the site.

The site is congested with vehicles dropping off and picking up patients. A new multi storey car park for visitor and patient parking recently open on site which may have eased this to some extent. Car parking is managed using a smart card system. The site is served by a bus station, located on its gateway roundabout, with up to 60 buses arriving every hour. The hospital is directly accessible from three of Cambridge's five Park and Ride sites. Cycling for staff and visitors is actively encouraged and the site offers a number of cycle parking facilities throughout the site, despite this cycles chained to railings are a common sight.

E1.3.3 Vision and Economic Focus



Addenbrooke's NHS Trust has set out its 2020 Vision for the future of the Addenbrooke's Hospital site for it to transformed into the Cambridge Biomedical Campus. This would support the growth of scientific understanding; the discovery of new medical techniques; the education of healthcare staff; economic growth and improved access to modernised NHS services. The 2020 Vision forms part of the wider development of the Cambridge Southern Fringe.

The 2020 Vision includes an area for research and development accommodation to the southwest. The focus of this part of the campus will be specialist research and occupants will be limited to those whose activities can benefit from interaction with the clinical and research communities on the campus. It aims to provide specialist premises to reinforce the existing biomedical and biotechnology cluster in the Cambridge area. It has potential to gain advantage from its proximity to the hospital, University and other internationally important research institutes nearby.

It is also envisaged that Papworth Hospital will move to Addenbrooke's by 2021.

E1.3.4 Policy Context

The Cambridgeshire and Peterborough Joint Structure Plan (2003) includes policies supporting the 2020 Vision and recommending that land in the south of the City be released

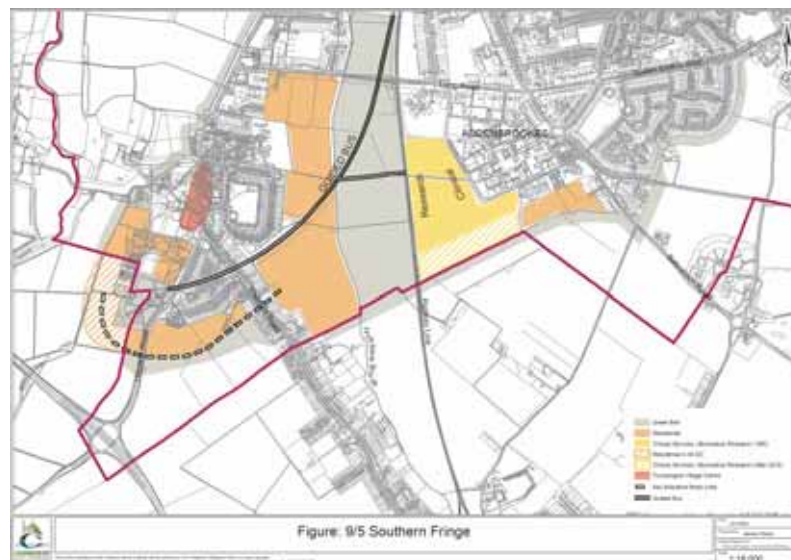
from the Green Belt and brought forward for early development. This development is to include the 2020 Vision proposals, additional housing allocations, community facilities and the provision of adequate transport and social infrastructure.

The plan promotes the Addenbrooke's campus as a strategic employment location and gives a commitment to invest in the success of world-class biotechnology clusters, such as the Addenbrooke's campus.

Addenbrooke's is within an area designated as an area for major change and it is therefore anticipated that it will see significant development during the period of the Cambridge City Local Plan (2006). Local policy states that the site will be primarily for clinical development and biomedical and biotechnology research and development activities, related support activities; related higher education and sui generis research institutes. Additionally 10.28 ha of land south of the main Addenbrooke's site will be safeguarded for future clinical development and as an extension to the research area post 2016.

Development of the site forms part of the redevelopment of the wider Southern Fringe Area, as illustrated in the figure below:

Southern Fringe Redevelopment Area



Source: Cambridge City Local Plan (2006)

Policy 9/5 Southern Fringe in the Local Plan states that the research area should focus primarily upon genuine B1 (b) research and development uses and sui generis research institutes. It is to be marketed towards firms from the biotechnology, pharmaceutical and medical device and equipment sectors. Related support activities are also acceptable on an appropriate scale. These activities might include patent agents, venture capital firms, marketing and sales activities, provided individual premises do not exceed 500 sq meters and such uses provide evidence that they support other clinical and research and development tenants on the site. A condition or legal agreement will be used to ensure future occupation accords with this mix of uses.

The site is also subject to Policy 8/15 Mullard Radio Astronomy Observatory, Lord's Bridge in the Local Plan (2006) which requires proposals to not adversely affect the operation of the Mullard Radio Astronomy Observatory.

Part of the site is located in a flood zone and is therefore subject to Policy 4/16 in the Local Plan (2006) which sets an initial presumption against development. Proposals for development in such areas will be required to demonstrate that the development (and its means of access) are not at risk of flooding and do not increase the risk of flooding elsewhere.

E1.3.5 Market Considerations

The project has widespread support from the public, private and charitable sectors. The project has already secured public and charitable funding and is likely to continue to attract research investment from private, public and charitable sectors, seeking a presence in Cambridge. The development will benefit from the existing established reputation of the site and links with the life sciences cluster.

It is accepted that hospital needs to grow to meet increasing demand for both local and regional services. There has been considerable interest in the site recently and a critical mass has now been generated that will add to the reputation, of the campus, drawing in new investment. The Cambridge City and South Cambridgeshire ELR (2008) finds that there is evidence of business user demand emerging over a long period.

E1.3.6 Recommendations/ Key Actions for Delivery

Access within the hospital site is currently constrained by the layout of the existing buildings. The site is capable of supporting improved transport links and, in particular, improved access by public transport. The site will have a spur to the Cambridgeshire Guided Bus and the opportunities for staff and visitor to use this should be maximised. The development requires that a new road is provided to link Hauxton Road to the Hospital which will also serve the new residential areas east and south-east of Trumpington and the 'Cambridge Bio-Medical Campus'.

Babraham Research Campus is located at the heart of the Cambridge technology cluster and future development should maximise the benefits of its physical location as well as existing networks with other research institutes. The cluster of life sciences in the Cambridge area should work together to create a critical mass required to successfully market the range of opportunities the cluster offers to the global market.

Development of the site should exploit the benefits of co-location with the hospital and the existing research establishments.

Development of the site should minimise any adverse visual or landscape impacts on the surrounding area. New buildings should be of a high standard and be subject to a design code to ensure they are seen as a 'family' of buildings. Development of the site should be accompanied by a strategy for improving the quality of the existing environment and landscaping.

Development proposals for the site will need to demonstrate that there is no detrimental impact on flood risk

E1.3.7 Risks

Development of the site is strongly supported by all sectors. The project is endorsed in local planning policy thereby reducing risks to its delivery.

E1.4 Babraham Research Campus

E1.4.1 Overview

Babraham research Campus is located six miles south of Cambridge. The campus has been developed by Babraham Bioscience Technologies Ltd (BBT) and the Babraham Institute. It is a knowledge-driven campus occupied by academic and commercial sectors. There are approximately 30 start up and growing bioscience companies on site.

E1.4.2 Site Description

The site is home to a range of buildings in extensive parkland centred on Babraham Hall. The site is generally organised into academic



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