Basildon Employment Land and Premises Study

Final Report

July 2013

Plan Design Enable

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Executive Summary

Scope and Purpose of Study

In October 2012 Atkins Ltd were commissioned to undertake an Employment Land and Premises Study on behalf of Basildon Borough Council in order to analyse the future demand for employment land in the Borough to 2031.

This Basildon Borough Employment Land and Premises Study provides a robust evidence base and associated policy recommendations to assist in the development of policies in the Council's planning policies and land allocations.

The Study assesses the current provision for employment in the Borough. It provides an assessment of future demand and market demands and evaluates current policies and research in neighbouring authorities.

Methodology

The Study has involved a comprehensive assessment of the future demand for employment land that complies with the National Planning Policy Framework (NPPF), including the need to be more flexible and responsive to market signals and the need to demonstrate greater co-operation with neighbouring authorities.

Basildon Borough Council is commencing work on the next draft of the Core Strategy, following the publication and public consultation on the Core Strategy Preferred Options Report, which identifies a number of Primary Areas for Development and Change (PADC) that are applicable for B-class employment. This will include regeneration of Basildon town centre and other key centres, including Wickford, Laindon and Pitsea that will provide employment opportunities. In addition there will be B-class use intensification of the Enterprise Parks Corridor (A127) and new B-class use development in Dunton North and B-class use intensification of the Radford Way Employment Area.

A review of existing policies and strategies has been prepared along with a summary of the prevailing socio-economic conditions in Basildon Borough to set out the socio-economic context which shapes employment land demand and supply factors in the study area. Appendix F includes a map of the study area.

An examination of the Basildon Borough market for B-class uses was undertaken that draws upon the Estates Gazette (EGI) commercial property database to identify 'market signals', such as vacancy rates, stock and rental levels by location and property type. A telephone survey of 251 businesses located in the study area was conducted with owners, managers and directors to gain an understanding of the needs and aspirations of businesses in the study area.

An assessment of the future employment needs in Basildon Borough for the period to 2031 was carried out based on projecting employment growth in the study area. This used latest employment forecasts for Basildon Borough generated by the Experian Model. The raw data provided by the Experian Model forms the basis of our Baseline Scenario for employment growth in Basildon Borough in the period from 2012 to 2031. Two additional scenarios were also developed that included a Housing Model (13,800 homes) and Housing Model (17,000 homes) Growth Scenario. These have been provided to sensitivity test and contextualise the Baseline Scenario, reflecting the fact that future employment trajectories (and hence employment land requirements) are the function of a complex range of drivers and can be highly dynamic.

A robust assessment of 24 existing employment sites (identified by Basildon Borough Planning officers) within the administrative areas was undertaken using a site appraisal pro-forma (Appendix A), this collected a mixture of qualitative and quantitative data. The sites were assessed against criteria (including access; sustainable development criteria; quality of site environment and surroundings; market requirements and perceptions; and policy considerations) to assess their suitability for employment uses and ability to meet future business accommodation requirements to 2031. The site appraisals also included an overview of the three main town centres of Basildon, Billericay and Wickford.

The Study also included a high-level assessment of 14 potential strategic employment locations (identified by Basildon Borough Planning officers) to explore their suitability for new B-class development and to inform the Council's Local Plan policy approach on employment land.

The Study concluded with policy recommendations for achieving a demand – supply balance and meeting employment demands for the period up to 2031.

Key Findings

Economic Context

Basildon Borough is located in south Essex and within the Thames Gateway. The Borough is performing reasonably when compared against England and the East of England, with an annual growth rate of 1.4% and over 76,000 jobs. Wages have steadily increased between 2002 – 2011 despite the economic downturn and Basildon Borough maintains a relatively skilled workforce that is broadly in line with the regional and County levels.

Basildon Borough's key employment sectors are wholesale and retail trade; repair of motor vehicles and motorcycles; manufacturing and human health and social work activities. Growth in employment has been strong in education and electricity, gas, steam and air conditioning supply sectors over the period 2008 – 2011. In contrast, finance and insurance activities and administration and support services have experienced decline that is above the County and Regional averages over the period 2008 – 2011.

Commercial Property Market

Basildon Borough's industrial market is performing well, due to its well-established industrial estates concentrated along the A127 Enterprise Parks Corridor and strategic transport connections. Local commercial property agents noted that new inquiries for industrial space tended to be for larger units. The assessment of property market indicators (in chapter 4) identifies that Basildon Borough faces competition from the key centres of Thurrock and Brentwood that have provided a good supply of larger industrial premises in recent years and new development coming forward in Thurrock (DP World and Tilbury Port) is likely to exacerbate this.

Basildon Borough's office market is much smaller when compared to the industrial market. The majority of the Borough's existing office space is used as supplementary accommodation by the industrial / storage & distribution businesses with a few single-occupier sites located within established industrial areas. Office accommodation in the town centres is considered to be generally poor quality and suffers from a lack of car parking and high commercial service changes. There is a perception amongst local commercial property agents, that Basildon Borough has a poor image in the office market and that this is unlikely to change quickly, and will be reliant on town centre regeneration schemes. Basildon Borough also faces stiff competition from the more successful and established key centres of Chelmsford and Brentwood.

Based on the recent Business Survey, most firms are generally satisfied with existing premises and are based in Basildon Borough due to historic reasons and locally available workforce. Businesses are fairly optimistic with around a third planning to expand. A small proportion of businesses (15%), mainly small and medium sized businesses and those in the information and commercial sector have considered relocation to other key centres, including Brentwood and Chelmsford. Of those businesses in Basildon Borough that wanted to expand nearly half said that this would lead to a need for additional floorspace, and over half of these said that they would be unable to accommodate their additional floorspace needs at their existing premises (either through extension, refurbishment, redevelopment or more intensive use).

The Council has also been in consultation with the business community. Basildon Business Group (BBG) raised concerns that there is not sufficient land which is 'ready to go' in locations desirable to occupiers or provide a framework for the delivery of sites and there are not a range of sites for new businesses or for the retention of existing businesses in the Borough.

Future Requirements

The Atkins employment forecast identifies a net growth of 3,767 jobs in Basildon Borough to 2031 under the Baseline Scenario. Sector forecasts indicate that future demand for new floorspace would largely be for B1a premises and B8 premises. Job growth would lead to a requirement for approximately 49,000 sq.m of B1a floorspace and 78,000 sq.m of B8 floorspace; this is equivalent to 22 hectares of B1a and B8 employment land by 2031. The quantum and type of demand for floorspace significantly varies according to the growth option:

- The Baseline Scenario identifies that there is some demand for office / R& D around 6.5 hectares and warehousing at around 15.5 hectares. There is an oversupply of industrial land with an excess of some 13.8 hectares.

- Under Scenario 2 (which assumes that 17,000 new homes will be delivered in the plan period 2011-2031) when combined with the needs in the Baseline Scenario there is considerable demand for office / R&D with some 10 hectares identified and a significant demand for warehousing at some 37 hectares. There is minimal land demand for industrial uses (1 hectare).

- Under Scenario 3 (which assumes that 13,800 new homes will be delivered in the plan period 2011-2031) when combined with the needs in the Baseline Scenario there is considerable demand for office / R&D with a demand of 9 hectares and a significant demand for warehousing at some 32 hectares. There is an oversupply of industrial land, which amounts to around 3 hectares.

Assessment of Existing Employment Sites

The 24 existing employment sites (including the three main town centres) identified by Basildon Borough planning officers were assessed for their suitability for existing B class uses and future development opportunities based on a number of criterion, the employment suitability score of existing sites in Basildon Borough: 16 sites received a good score (over 60%), 5 sites received a fair score (between 41% - 59%) and 3 sites received a poor score (40% and below).

Supply of Employment Land

Basildon Borough's employment floorspace is predominately general/light industry with a 38% share of total B-class employment floorspace, which is followed by office (B1a) with a 24% share, warehousing with a 20% share and research & development (B1b) with an 18% share of total B-class employment floorspace, respectively.

There is currently a vacancy rate of 12% of all B-class floorspace in the Borough, which is considered to be a reasonable level of vacancy considering recent economic conditions, but office and warehousing vacancy rates are relatively higher. Whilst, there does need to be some vacancy for the market to function efficiently, these high vacancy rates could indicate that the actively marketed premises are not meeting the demands of businesses e.g. inadequate size or quality. Around 45% of total actively marketed premises are of second-grade quality.[1]

The Borough has a number of potential sources that could bring forward new employment floorspace, as follows:

- Vacant Floorspace – there is currently around 167,845 sq.m of actively marketed B-class employment floorspace.
- Commercial Development Pipeline - identifies that there are extant B use class planning permissions, which would result in a total net gain of 7,050 sq.m of B-class floorspace.

[1] Second-hand quality premises are premises that are not newly developed or under-construction or premises that have been recently refurbished.

- Town centres have been earmarked for significant potential for new B-class development. This includes around 1,000 sq.m of mixed commercial floorspace in Wickford town centre and around 25,000 sq.m of office development in Basildon town centre.
- Vacant/underutilised land identified in the site appraisal surveys could provide an additional 241,680 sq.m of B-class floorspace across 48.2 hectares over seven existing employment areas. It is important to note that the vacant/underutilised land should not be relied upon as a guaranteed source of land supply for B-class development in the short-term, as some sites may represent more medium-term opportunities as require land assembly assistance etc. Also developers are likely to bring forward sites with a different quantum and types of B-class development.
- Key employment site allocations – Land West of Gardiners Lane South (protected under BAS E2 in the Saved policies of the Local Plan) and Terminus Drive Pitsea (protected under BAS E2 in the Saved policies of the Local Plan) could provide for additional B1/B2 development.

Demand – Supply Balance
The Table below sets out the relationship between the estimated demand and supply of employment floorspace in the Borough by type of floorspace. It takes account of the total supply identified in the study and subtracts the total demand identified in each of the scenarios. The Table below identifies the remaining surplus once the anticipated demand has been removed from the potential supply of new sites.

Demand-Supply Balance (2011 – 2031)

B-class Land Use	Scenario 1: Base Scenario	Combined needs Scenario 1 + Scenario 2: Housing Growth (17,000 new homes)	Combined needs Scenario 1 + Scenario 3: Housing Growth (13,800 new homes)
Office / R&D (B1(a) / B1(b))	9.1	5.6	6.6
Industrial (B1(c) / B2)	44.9	30.1	34.1
Warehousing (B8)	9.3	-12.2	-7.2
Total	**63.3**	**24.5**	**33.5**

Source: Atkins /Experian Figures have been rounded

The findings are as follows:

- Under the Baseline Scenario all demand could be met and there is a large surplus of industrial land (B1c/B2) at some 44.9 hectares. Both Warehousing (B8) and office (B1a) space have a surplus of around 9 hectares.

- Under the Scenario 2 (assumes 17,000 new homes) there is a large surplus of industry land (B1/B2) at some 30.1 hectares. There is a large shortfall of warehousing (B8) land by some 12.2 hectares and office (B1a) space has a surplus of 5.6 hectares.

- Under the Scenario 3 (assumes 13,800 new homes) there is a large surplus of industry land (B1/B2) at some 34.1 hectares. There is a large shortfall of warehousing (B8) land by some 7 hectares and office (B1a) space has a surplus of 6.6 hectares.

The Study identified that there is theoretically a significant pipeline of potential B-class floorspace, however it is evident that the market may dictate a different quantum of development being achieved on sites and development may come forward at different times or for different uses. It should also be noted that there is a need to provide employment land in a range of locations to meet different market aspirations. As such there will always be a need for some surplus over and above the level of demand identified to account for this issue.

Vacant/underutilised land represents a short-medium term opportunity of some 48.2 hectares that could go some way to meeting the B-class demand requirements. This would equate to an additional land supply that could potentially include 7 hectares for offices, 16.7 hectares for industrial and 24.5 hectares for warehousing, which would meet the Baseline Scenario demand but would only meet part of the demand in the two housing growth scenarios (i.e. demand for office and industrial land could be met).

Office and Research & Development (B1a/B1b)

The supply of potential opportunities identified in quantitative terms exceeds the demand, which represents a 19.1% increase in employment (under the Baseline Scenario) in the B1a/B1b sector. Under Scenario 2 (when combined with the Baseline Scenario) there is an increase in employment of 29.9% for B1a/B1b and under Scenario 3 (when combined with the Baseline Scenario) there is an increase in employment of 26.8% for B1a/B1b. The majority of office floorspace supply would come from vacant/underutilised land identified in the existing employment sites. For some of the vacant land opportunities there may be a need for the Council to help to facilitate land assembly to enable development. In terms of future potential Basildon town centre would provide a choice of locations for office based premises with good strategic transport links to London. Wickford would also provide a limited amount of new office development within its town centre.

Locationally most future office supply will be concentrated in Basildon town centre and to north along the A127 ‘Enterprise Parks Corridor’. The scale of opportunities provides choice and flexibility in the range and type of locations and new allocations are not likely to be required. However, the pace at which the Borough can accommodate growth is dependent on some of the identified/underutilised land for B-class employment development and landowners bringing forward such sites for this type of development. The process of redevelopment and re-provision of suitable floorspace within the town centre development proposals will also depend on the capability of the market and financial institutions to support regeneration and the redevelopment of such premises.

Light Industrial and Industrial Activities (B1c/B2)

It is anticipated that industrial (B2) and light industrial (B1c) employment and associated floorspace is expected to decline over the plan period, however under the housing growth scenarios there will be a need to increase B1c/B2 uses. The level of decline in employment is of a scale reflecting a reduction of 15.4% and 16.7% (under the Baseline Scenario) in the B2 and B1c sectors, respectively. Under Scenario 2 (when combined with the Baseline Scenario) there is an increase in employment of 1.9% for B1c and 0.6% for B2. Under Scenario 3 (when combined with the Baseline Scenario) there is an decrease in employment of 2.3% for B1c and 3.5% for B2.

Whilst there is not a demand for new B2/B1c development (as identified in chapter 7), there will be a need to allow for the refurbishment / redevelopment of the B2/B1c industrial stock overtime to accommodate needs that would be generated under the higher growth scenarios. It is important that a supply of sites is maintained to meet these needs. Overtime as land used for B1c/B2 uses becomes vacant there may need to redevelop the land to meet needs for other B class uses or other uses.

Warehousing and Storage Uses (B8)

The supply of potential opportunities identified in quantitative terms exceeds the demand, which represents a 14.6% increase in employment (under the Baseline Scenario) in the B8 sector. Under Scenario 2 (when combined with the Baseline Scenario) there is an increase in employment of 34.5% for B8. Under Scenario 3 (when combined with the Baseline Scenario) there is an increase in employment of 29.7% for B8. The capability of the Borough to support demand for this activity is constrained by supply. The main source of supply is from vacant/underutilised land but this combined with the commercial development pipeline (valid unimplemented permissions) would provide enough floorspace and land to meet demand. However under the housing growth scenarios there would be a shortfall of warehousing supply. This might therefore require some additional land to be allocated to accommodate these needs.

Planned and committed supply will not always be translated into the physical provision of floorspace. In this context, it will be important to protect existing, viable employment areas and not rely on potential supply that may not reach the market place.

In planning for meeting future demand, it will be essential to ensure that supply can respond to market needs in terms of the type of premises required. The emerging employment land supply policies and associated designations should provide sufficient choice and flexibility to meet the varying needs of the market.

Policy Recommendations, Implementation and Monitoring

The study shows that the existing employment sites are operating effectively and viably as employment locations (on the whole), and in particular the future employment land supply demand balance shows that there is sound justification for the continued protection of existing employment areas. The employment policies that are in the Local Plan are supported by this evidence and accord with the NPPF.

The Study identifies recommendations for taking forward employment land policies in the Basildon Borough on the basis of the evidence set out in this report that include:

- Existing Employment Areas – retention of the existing employment areas policy which is in conformity with the NPPF and ensures the retention of a supply of locally significant employment land to meet the existing and future needs for employment in the Borough.
- Existing Employment Areas Designations – removal of designated employment areas, amendments to some of the existing employment area boundaries and the addition of two undesignated employment areas (that are not located within the Green Belt).
- Assessing Market Signals – in order to respond to market signals the Council should do the following:
    - Undertake regular reviews of the employment land every 3-5 years as appropriate
    - Undertake surveys of businesses to understand local businesses needs and aspirations, this will require an appropriate sample size and will need to explore aspirations for growth / expansion, perceptions of the suitability of the location, type, size and quality of the premises.
    - Continue to carry out and monitor existing employment sites through regular annual or bi-annual surveys, assessing quantity of occupied and vacant floorspace, but also assessing the quality of the premises and wider site environment.
    - Consult regularly with local property agents to gain perspectives of local market conditions.

1. Introduction

Background and Objectives

1.1. Atkins Ltd was commissioned in October 2012 to undertake an Employment Land and Premises Study on behalf of Basildon Borough Council. The purpose of the study was to provide a robust evidence base and associated policy recommendations to assist in the development of policies in the Council's emerging Local Plan including the Core Strategy and other associated Development Plan Documents. The core objectives of the study were to:

- Assess the current national, regional and local planning policy context
- Assess the local economy, including future demand for premises based on sector analysis land and property market (offices and industrial).
- Assess the existing supply of employment sites and premises (B-class)
- Assess the demand for employment floor-space over 5, 10, 15 and 20 years
- Assess the supply and demand balance (offices and industrial)
- Provide policy recommendations and explore monitoring and targets.

1.2. This study will provide a robust evidence base and associated policy recommendations to assist in the development of the Borough's planning policies and land allocations.

Coverage

1.3. The study is concerned specifically with employment land and premises that fall within the "B-class" of the Town and County Planning (Use Classes) Order 1987 (as amended) (the "UCO"). Specifically the UCO identifies the following categories for employment land within the "B-class":

- Class B1 – Business

Use for all or any of the following purposes:

(a) as an office other than a use within Class A2 (financial and professional services),
(b) for research and development of products or processes, or
(c) for any industrial process, being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

- Class B2 – General Industrial

Use for the carrying on of an industrial process other than one falling within Class B1 above.

- Class B8 – Storage or distribution

Use for storage or as a distribution centre.

1.4. The employment forecasts in chapter 7 cover all sectors of the economy. The report also considers the role which mixed use development can play in meeting the demand for B-class activities in the Borough.

Structure

1.5. The structure of the report is as follows:

- Chapter 2 provides an up-to-date review of relevant local, regional and national policy context;
- Chapter 3 reviews the socio-economic profile and sets out key findings from the business survey of Basildon Borough;
- Chapter 4 reviews the Borough's commercial property market trends;
- Chapter 5 reviews the supply of employment land in Basildon Borough;
- Chapter 6 reviews the existing portfolio of employment areas in the Borough;
- Chapter 7 examines the likely future demand for employment land in Basildon Borough;
- Chapter 8 reviews the proposed changes to some of Basildon Borough's employment land designations; and
- Chapter 9 summarises the Consultant's conclusions and recommendations.

2. Policy Review

Introduction

2.1. This section summarises the policy context for the study and provides conclusions on the implications of the policy review for Basildon Borough.

2.2. The policy review has included an assessment of the relevant National and Regional policy context including the NPPF. We have also reviewed the Council's existing policy approach, and have reviewed the employment policies of the Greater London Authority (GLA) and neighbouring boroughs.

National and Regional Policy Context

The National Planning Policy Framework

2.3. The National Planning Policy Framework (NPPF) was published in March 2012. It is a key part of the Government's reforms which aim to make the planning system less complex and more accessible and to promote sustainable growth. It consolidates all policy statements, circulars and guidance documents into a single, simple Framework.

2.4. One of the main changes to the planning system includes the removal of the regional tier of planning outside of London.

2.5. The purpose of the planning system is to contribute to the achievement of sustainable development. Therefore, one of the roles of the planning system is to help build a strong, responsive and competitive economy by ensuring that there are sufficient opportunities identified within the plan to allow for economic growth.

2.6. The National Planning Policy Framework identifies the importance of building a strong, competitive economy as an integral part of achieving sustainable development. Paragraph 18 emphasises the Government's commitment to securing economic growth in order to create jobs and prosperity. Paragraph 19 states that significant weight should be placed on the need to support economic growth through the planning system. Specifically, planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing (Paragraph 21). In their local plans, local planning authorities should, inter alia:

- set out a clear economic vision and strategy for their area;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

2.7. Local Planning Authorities are required to maintain a robust evidence base through the continued analysis of existing and future economic activity and employment land requirements in order to ensure that a suitable and sufficient supply of employment land is available to meet the identified needs of businesses over the plan period.

2.8. Paragraph 158 sets out the need to base Local Plans on an adequate, up-to-date and relevant evidence base. It highlights the importance of ensuring that assessments of and strategies for housing, employment and other uses are integrated and take full account of relevant market and economic signals.

2.9. Paragraph 161 confirms that up-to-date evidence gathered in the plan-making process is essential for understanding the needs for land or floorspace for economic development and the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs.

2.10. Local Plans also need to be more flexible and responsive to 'market signals' to ensure that there is adequate provision of the right type of employment land to meet the needs of business communities. Local Planning Authorities will need to develop policies that support existing business sectors as well as identifying and planning for new or emerging sectors to locate in their area.

2.11. Paragraph 22 advises against the long term protection of employment allocations where there is no reasonable prospect of them coming forward. Applications for alternative uses on these sites should have regard to market signals and the relative need for different land uses to support existing communities.

2.12. Paragraph 51 states that LPAs should normally approve applications for the change into residential use from commercial development where there is an identified need for housing development provided that there are not strong economic reasons why such development would be inappropriate.

Duty to Cooperate and Neighbouring Local Authorities

2.13. Basildon Borough's neighbouring districts include: Thurrock, Brentwood, Chelmsford, Rochford and Castle Point. Section 110 of the Localism Act sets out a new 'duty to co-operate'. This applies to all local planning authorities, national park authorities and county councils in England – and to a number of other public bodies. The new duty:

- relates to sustainable development or use of land that would have a significant impact on at least two local planning areas or on a planning matter that falls within the remit of a county council, requires that councils set out planning policies to address such spatial issues;
- requires that councils and public bodies 'engage constructively, actively and on an ongoing basis' to develop strategic policies;
- requires councils to consider joint approaches to plan making.

2.14. Paragraph 156 of the NPPF sets out the strategic issues where co-operation might be appropriate, including the provision of major retail, leisure, industrial and other economic development across a travel to work area.

2.15. Paragraph 160 highlights the benefits of Councils and other bodies working with the business community, Local Enterprise Partnerships and other stakeholders to achieve a clearer understanding of business needs within their local economic market.

2.16. Paragraphs 178-181 of the NPPF give further guidance on 'planning strategically across local boundaries', and highlights the importance of joint working to meet development requirements that cannot be wholly met within a single local planning area, through either joint planning policies or informal strategies such as infrastructure and investment plans.

2.17. This study provides part of the evidence base which enables the Council to demonstrate how its approach to economic development meets with the requirements of the NPPF and the sustainable development of the Borough.

Changes to Permitted Development Rights

2.18. In addition to the changes to the national policy guidance, there are other reforms to planning that could have implications on employment land. The recent proposed changes to permitted development rights, will allow office buildings (use class B1a) to be converted to residential use (use class C3), without the need for planning permission. In January 2013 the Department for Communities and Local Government (DCLG) wrote to all Chief Planning Officers to advise them of the changes to the permitted developments rights that will come into force in spring 2013.

Regional Policy Context

2.19. The Localism Act 2011 removed the legal framework for the review of Regional Strategies or the adoption of new or revised Regional Strategies, which gave the Secretary of State powers to revoke in full or in part the existing strategies by order.

2.20. The Government intends to replace the eight regional strategies (comprising the relevant regional spatial and regional economic strategies) outside of London with a more localised planning system.

2.21. Whilst the Localism Act revoked the Regional Spatial Strategies (RSS's) they are technically part of the development plan until the Government has dealt with the Strategic Environmental Assessments (SEA's). The Government laid an Order in Parliament to revoke the East of England Regional Strategy, following the completion of the SEA. The Order came into force on 3rd January 2013. As such, the East of England Plan is the first RSS to be abolished and was officially revoked on the 3rd January 2013.

The Greater Essex Integrated County Strategy (2010)

2.22. The Integrated County Strategy (ICS) provides a shared and agreed vision for Greater Essex prepared by Essex County Council. The Strategy identifies the real priorities and outcomes needed to achieve increased economic growth in the sub-region.

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

- Thames Gateway South Essex (TGSE) – achieve transformational development and change through the TGSE to significantly improve the local economy, quality of life of residents and natural and built environment.
- Key Towns – promote opportunities for economic growth, redevelopment and regeneration in the key urban centres of Southend, Thurrock, Basildon, Harlow, Chelmsford and Colchester.
- Low Carbon – support the growth of renewable and low carbon energy as a key sector and promote the growth and location of associated industries in Greater Essex.

2.24. The Thames Gateway South Essex sub-region comprises the Essex authorities of Basildon, Castle Point, and Rochford; and the two unitary authorities of Southend on Sea and Thurrock which border the Thames estuary. It forms part of the wider Thames Gateway which extends into east London and north Kent, and which represents Europe's largest regeneration programme.

2.25. Basildon Borough is identified by the County Council as a key economic centre within the sub-region (refer to Diagram 4: The ICS Priorities[2]). There is opportunity to improve development within the centre and strengthen its connectivity to neighbouring districts and beyond as part of a wider integrated transport strategy.

2.26. In addition, to achieve a sustainable level of growth in Greater Essex, there needs to be a more balanced pattern of development to ensure that housing is matched with jobs and services. Basildon Borough is identified as a key growth location and will need to accommodate new housing, infrastructure, services and facilities and employment uses in a sustainable way.

Thames Gateway South Essex Partnership

2.27. The Thames Gateway South Essex Partnership (TGSEP) is a strategic partnership between the six local authorities covering South Essex (Basildon Borough Council, Castle Point Borough Council, Essex County Council, Rochford District Council, Southend-on-Sea Borough Council and Thurrock Council). The objective of the partnership has been to drive forward the economic growth of the area.

2.28. The TGSEP is committed to helping deliver 55,000 new jobs and 43,800 new homes to the region by 2021 through regeneration. The TGSEP are particularly focused on improving existing urban centres and are seeking to combine this with extensive town centre regeneration

[2] Essex County Council. The Greater Integrated County Strategy, 2010, p.41

proposals. Basildon Borough is one of three major urban areas in the wider Thames Gateway where regeneration and growth is to be concentrated (the others being Southend-on-Sea and Thurrock).

2.29. The draft TGSEP's Economic Development Strategy and Action Plan (2007) highlighted the following key issues to be addressed in future regeneration strategies:

- satisfying the future travel demands of the regeneration hubs around Thurrock, Basildon/Castle Point, Shellhaven, and Southend/Rochford;
- the extent of traffic congestion on the strategic roads (A127, A13 and A130).

Essex Transport Strategy (2011)

2.30. The Essex Transport Strategy was adopted in January 2011 and sets out travel improvements in the county over the next 20 years. The Strategy identifies that reliable connectivity is crucial for Essex residents to access jobs and local businesses to access markets. It identifies that transport improvements need to be delivered in a way that is joined up with spatial planning and economic policies; improving journey time reliability, providing good access for business, and making locations more attractive to live in. The Strategy supports the strengthening of transport connections between the main employment centres and the national transport network (as well as to the expanding ports and airports).

2.31. The Strategy identifies that strategic inter-urban roads in the area (which include the A127, A129, A130 and A13) are subject to frequent congestion. It will be important, both to the area and the wider economy of Essex, to improve the reliability of journeys along these routes. Policy 3 identifies that the County Council will facilitate the improved reliability of journeys by:

- undertaking its network management duty in line with the Traffic Management Act;
- monitoring and managing the impact of traffic through the Essex Traffic Control Centre;
- focusing investment on those parts of the network that would give the greatest benefit to the economy and quality of life;
- using a functional hierarchy of routes to manage traffic;
- working with operators to improve the punctuality of bus services;
- minimising disruption by co-ordinating and managing the impact of roadworks undertaken by the County Council and utility companies; and
- applying the Speed Management Strategy.

Basildon Enterprise Corridor

2.32. Essex County Council has embarked on a scheme to regenerate Basildon Borough's industrial areas, known as the Basildon Enterprise Corridor. Having bid successfully for Community Infrastructure Funding for a range of schemes to improve the area, works have taken place on a number of improvements along Cranes Farm Road, East Mayne, Noak Hill and the A127 Fairglen Interchange. Works on the A127 Fairglen junction were completed in 2009 and the remaining schemes were processed as a single scheme with an original completion date of May 2011. These improvement schemes will complement other improvements planned for the Thames Gateway area, including major investment at the Sadlers Farm junction, an extension to Roscommon Way on Canvey Island, and other significant schemes currently in development.

Local Policy Context

2.33. The current planning policy framework at Borough level is set out below. The purpose of the study is to review this approach and provide recommendations which will enable the policies set out within the Core Strategy and other Development Plan Documents to be updated and inform growth related plans and strategies and land use related business enquiries.

Emerging Core Strategy

2.34. The Core Strategy will identify development in the Borough over the next 20 years until 2031. The Core Strategy Preferred Options Report (CSPOR) was published in February 2012 and was subject to a public consultation between 27th February and 11th April 2012. The CSPOR indicated that business space and a prosperous economy were critical aspects of the emerging development plan. Following this study, the Revised Preferred Option Report could change the nature of these previous proposals. The Core Strategy Preferred Options Report (CSPOR) identified a number of Primary Areas for Development and Change (PADC) that are applicable for B-class employment:

- PADC1 identifies in principle the mixed use regeneration of Basildon town centre that will provide new commercial development as part of this.
- PADC4 identifies the future potential for mixed use regeneration of Wickford town centre that will provide new commercial development as part of this.
- PADC7 Enterprise Parks Corridor identifies in principle the development potential of this corridor for new B1, B2 and B8 development through infilling sites and intensification, along with enhancements to the public realm and highway network.
- PADC8 Dunton North identifies in principle the release of 4 hectares of new B-class employment, with new supporting infrastructure and new highway access onto A127 Dunton Interchange.
- PADC11 Radford Way Employment Area identifies in principle support for the preparation of a masterplan/development brief for the area and grants it a new status to encourage more coordinated development and investment within the area, to enhance it for existing businesses, encourage new ones to locate and to provide supporting complimentary facilities. There is development potential for new B1 and B2 floorspace, enhanced urban realm and highway network and new gateway to Lake Meadows Park.

2.35. Policy CS7 identifies in principle support for the diversification of the Borough's economic base and seeks to encourage new economic investment by bringing forward strategically allocated urban land at Dunton North (PADC8) to provide new employment land for B1 and B2 uses. The policy also supports the regeneration of Basildon town centre (PADC1), which could provide new office space.

Local Plan Saved Policies (2007)

2.36. The Basildon District Local Plan, adopted in March 1998 and its Alterations, adopted in September 1999 expired on 27th September 2007. It is no longer part of the Development Plan for the Borough in its entirety and cannot be used for the purposes of planning control or enforcement.

2.37. Saved Policies are policies that were originally part of the adopted Basildon District Local Plan (1998) and its Alterations. The Saved Policies form part of the Development Plan for the Borough and remain in place.

2.38. Policy BAS E1 identifies Land West of Gardiners Lane South as an area allocated for employment and open space uses. The land should be developed as a comprehensive mixed use development scheme with at least 16.2 hectares identified for employment purposes. In addition, at least 20.2 hectares will need to be retained for open space and residential land. The policy states that no development of the site should take place until the Council has prepared a design brief to act as a guide for the development of the area.

2.39. Policy BAS E2 identifies Terminus Drive, Pitsea as an area allocated for employment uses. The site covers some 3.5 hectares and is deemed suitable for B1 and B2 uses.

2.40. Policy BAS E3 identifies Land North of Courtauld Road as an area allocated for employment uses. The site covers 1.5 hectares and is deemed as suitable for B1 uses.

2.41. Policy BAS E4 identifies that planning permission for new business and general industrial buildings, extensions to existing buildings and changes of use of existing buildings to business and general industry (Use Classes B1 and B2) will generally only be permitted within allocated employment areas. Proposals for new B1 use class development will only be permitted where there is no adverse impact on residential amenities.

2.42. Policy BAS E5 identifies Land at the Ford Research and Development Centre, Dunton as an area that can only be developed for automotive research, design and development, and associated engineering industry and services, including suppliers to Ford Research and Development. Development not required for such purposes will not be permitted and any new development within the area will be subject to further criteria (e.g. avoidance of harmful visual impacts on the Green Belt).

2.43. Policy BAS E6 identifies that Harvey Road and Archers Field are areas where the development or expansion of untidy industry sites will be permitted. Untidy industry encompasses a variety of industries which are not only untidy in appearance, but which also have the potential to cause significant environmental harm.

2.44. All saved policies allocating specific locations for business development are reviewed for their continued appropriateness and are discussed in more detail in chapter 6.

2.45. BAS E7 development of land or buildings, allocated or in use for business, general industry, and storage or distribution purposes (Use Classes B1-B8) for a use falling within any other use class, with the exception of retail (Use Class A), may be permitted provided the following criteria are met:-

> i. there is adequate land and premises available elsewhere in the district to meet the district's business, industrial and storage or distribution needs;
> ii. the new use shall not lead to a significant net loss of employment;
> iii. there is adequate car parking; and
> iv. there is no adverse impact upon the amenities of the area;

2.46. Planning applications for retail development on land or buildings allocated for business, industrial and storage or distribution purposes will be considered with regard to Policies BAS SH1 (new retail development) and BAS SH6 (retailing on industrial estates).

2.47. BAS SH6 identifies that planning permission will be allowed for the change of use for Class B1, B2, or B8 to a retail use and will be subject to the following criteria:

> i. the proposed use does not cause material harm to the vitality and viability of any town centre;
> ii. there is not a significant net loss of employment; and
> iii. customer car parking provision is provided separate from existing car parking.

2.48. BAS E10 identifies that proposals for industrial, business and office development (Use Classes B1 to B8) will be considered with regard to the following criteria:-

> i. the surrounding roads must be adequate to accommodate the increase in vehicle traffic generated. A Traffic Impact Assessment may be required;
> ii. Developments should relate to the primary road network without using residential estate roads;
> iii. Adequate car parking should be provided
> iv. Adequate servicing and turning areas should be provided on the site in accordance with the Council's Highway Standards;
> v. Provision for the landscaping and screening of buildings and storage areas with a landscaping strip abutting all highways will normally have a minimum width of 5 metres to be retained at all times;
> vi. The design, form, scale, and materials of the development will be expected to be appropriate and sympathetic to neighbouring developments, particularly adjacent to residential areas; and
> vii. Adequate controls should be installed to limit the emission of noise, pollutants, discharge and smells which could be associated with the proposed use.

2.49. BAS TC1 identifies that town centres development appropriate to a town centre, including retailing, offices, recreational or community facilities and residential (where it forms an ancillary part of a mixed use scheme) will be encouraged.

Economic Development Strategy

2.50. The Strategy was published in 2009 aims to create a number of new job opportunities for local people over the next 15-20 years from new office and health sector employment, to construction and leisure jobs. Its regeneration focuses on five key areas:

- Regenerating town centres
- Quality housing
- Health and education
- Basildon business economy
- Culture and environment

2.51. These five areas will be delivered through a number of key projects that include but are not limited to:

- £1 billion redevelopment of Basildon Town centre
- Regeneration of Wickford, Pitsea and Laindon Town centres
- The construction of the Basildon Sporting Village
- Improvement of the A127 and Cranes Farm Corridors
- Major estate renewal programme

2.52. The Strategy is currently being updated and the new version will be published later in 2013.

Gardiners Lane South, Basildon (SPG)

2.53. The Supplementary Planning Guidance (SPG) adopted in 2003 relates to the site adjacent to Gardiners Lane South, identified within the Development Plan as a Comprehensive Development Area.

2.54. The SPG identifies up to 110,000 square metres of business premises, principally offices and light industrial units - catering for headquarters as well as start up units. It is proposed that the site provides a landmark destination to attract new business with a range of employment opportunities for the people of Basildon Borough that could in total offer 7,000 jobs. A range of business types is proposed, including start-ups, expanding companies and large businesses supported by an enterprise business support centre and innovation hub within a mixed-use core at the heart of the development.

2.55. The viability of the masterplan has subsequently been questioned as development for B1 uses is reliant on provision of a Junction on A127. The road junction is not considered to be deliverable due to funding issues and as such the quantum of development in the masterplan is not viable.

Basildon Town Centre Masterplan (Interim Draft SPD)

2.56. An approved regenerative masterplan exists for Basildon town centre, which was published in December 2012 and supports new commercial development as part of a mixed use regenerative strategy. Following approval by the Council's Cabinet it will inform the preparation of the emerging Local Plan and be a material consideration in the determination of planning applications in the town centre and its hinterland defined by the Masterplan Area.

2.57. The Masterplan aspires to provide the approximate following quantities of new or improved key uses within Basildon town centre:

- 1,500 - 2,000 residential units (C3 use class).
- 40,000 sq.m of retail and leisure (A1-A4, D1, B2 use class).
- 25,000 sq.m of office (B1 use class).
- A new hotel with 150 rooms (C1 use class).
- 10,000 sq.m of education facilities (D1 use class).

2.58. The Basildon town centre masterplan aims to transform the town centre into a more attractive place to live and work through major new housing and commercial development, an expanded evening economy, and improvements to the public realm.

Wickford Town Centre Masterplan

2.59. The Wickford town centre masterplan was approved in 2006 as a 'material consideration' for the determination of planning applications relating to Wickford town centre. The Council are committed to the redevelopment[3] and improvement of Wickford town centre over the next 20 years and the masterplan sets out the Council's aspirations for the town centre:

- A new gateway to the town centre
- 650 new jobs
- Over 500 new homes
- 2,600 square metres of retail
- 1,000 square metres of mixed commercial
- New public squares
- New health centre
- New swimming pool
- New library and community centre

Pitsea Town Centre Masterplan

2.60. The Pitsea town centre Masterplan was approved in 2007 as a 'material consideration' for the determination of planning applications relating to Pitsea town centre. The Council are committed to the redevelopment and improvement of Pitsea town centre over the next 15 - 20 years and the masterplan sets out the Council's aspirations for the town centre:

- 10-000 – 15,000 square metres of new retail floorspace.
- 4,500 square metres of new commercial leisure floorspace. The type of commercial leisure floorspace will differ throughout the centre, but will predominately comprise an increase in the quality of Pitsea's eating and drinking offer, catering for the different needs of residents.
- 300 – 400 new dwellings.

2.61. The Council have approved a planning application for the town's regeneration.[4]

Greater London Authority and Neighbouring Boroughs

2.62. Basildon Borough's neighbouring Local Authorities are at different stages of the planning process and require varying levels of land to accommodate new B class development in line with demand:

Greater London Authority (GLA)

2.63. The London Plan published in July 2011 sets out the Mayor's strategic spatial strategy for the Capital up to 2031. It forms part of the development plan for Greater London. London Boroughs' local plans need to be in general conformity with the London Plan, and its policies guide decisions on planning applications by councils and the Mayor.

2.64. London's economy is likely to resume growth, probably at a slower rate than before the current downturn. The London Plan identifies that the Mayor and other partners including relevant London boroughs and sub-regions should, engage with relevant agencies beyond London to identify and develop linkages across, and capacity of, nationally recognised growth areas, such as the Thames Gateway.

2.65. Chapter 4 of the London Plan relates to London's Economy, it seeks to ensure that London is a 'city that meets the challenges of economic and population growth' and maintains its edge as an internationally competitive and successful city. Given its close proximity and good transport connections to Central London, it is likely that Basildon Borough will continue to benefit from London's economic growth. Commuters to London will bring wealth to circulate in the Basildon economy and Basildon will be able to service London e.g. large established industrial estates.

2.66. Whilst there is opportunity for Basildon to share in London's success as a financial centre, it should be noted that the London Plan evidence base does not set out any direct comparative evidence between the Essex and London B class employment markets.

[3] The Cabinet Meeting held on 7th March 2013 confirmed the Council's support for the Wickford regeneration strategy and commitment to its implementation (see Item 138).

[4] Basildon District Council Committee's approval meeting (application ref no. 11/01332/FULL).

Brentwood

2.67. The Brentwood Replacement Local Plan is the Borough's current development plan, formally adopted by the Council in 2005. At the Policy, Performance & Resources Board on 8 December 2010, the Council decided to align the Core Strategy with Site Specific Allocations and rename as the Brentwood Local Development Plan.

2.68. The Employment Land Review (ELR) published in 2010 identifies a net growth of 4,100 jobs in Brentwood Borough to 2031. The sectoral forecasts indicate that future demand for new floorspace would be for B1 premises, and that the requirement would be for an additional 47,500 sq.m, this is equivalent to 6.33 hectares of employment land by 2031.

2.69. The ELR does not refer to the role of Basildon Borough in meeting Brentwood's economic needs or the relationship between the two authorities.

Thurrock

2.70. Thurrock Council has reviewed the Adopted Core Strategy to reinforce the promotion of regeneration and growth and to ensure that there is a continuing supply of suitable sites for housing coming through the planning system. A number of new specific locations for sustainable growth, which will deliver new homes as well as providing community infrastructure and sporting facilities, have been identified. The consultation period on this revision published in January 2013 finished on 1st March 2013.

2.71. The Employment Land Review Update was published in 2012 and identified that Thurrock has sufficient available employment land supply to meet projected demand throughout the planning period, although supply is reliant on a number of key sites and use classes. It is estimates that the existing capacity of these sites is approximately 20,000 to 25,000 jobs.

2.72. The Employment Land Review Update identifies that the London Gateway port will include the largest logistics park in Europe. This will create 12,000 jobs and approximately 850,000 sq.m of B class floorspace. This is likely to have an impact on Basildon's economic competiveness in the B class market.

2.73. The ELR does not refer to the role of Basildon Borough in meeting Thurrock's economic needs or the relationship between the two authorities.

Rochford

2.74. The Rochford District Core Strategy was adopted on 13 December 2011. The Rochford and Southend Employment Land Review Update was published in 2009 and identified that 4.2 hectares of land would be required in Rochford District to meet demand. The ambitious plans for Southend Airport is likely to herald further demand in employment land particularly in the local authority areas within its environs. The Rochford Employment Land Review (2008) identifies that a large proportion of its outward commuting for work is to Basildon (as well as Chelmsford, Southend and Central London).

Chelmsford

2.75. The Core Strategy was adopted in 2008, since then the Council has undertaken a review and has recently held a public consultation on the Draft Submission Document. The Chelmsford Employment Land Review was published in 2006 that identified a range of sites and premises that meet the needs of business community as identified within Chelmsford Borough. Analysis of the past take-up rates of employment land suggest that there will be a continuing need for employment allocations within Chelmsford Borough up until 2021. The Employment Land Review (2006) identifies that only Basildon and Brentwood can compete with Chelmsford for office supply in the Essex market.

Castle Point

2.76. The Core Strategy was withdrawn from the examination process in September 2011, since then the Council has commenced work on a new Local Plan. An Issues Consultation took place between 25th January and 28th March 2012. An Employment and Retail Needs Assessment was published in August 2012. For industrial space, the estimated range was between -3.3 ha and 4.4 ha, reflecting differences between economic growth and demographic based forecasts. For office space a requirement of between 0.6 ha and 2.5 ha is indicated. The overall net growth of B class jobs is estimated at 3,120 between 2012 – 2031 under the Baseline Scenario. The Employment and Retail Needs Assessment (2012) identified that Castle Point's local office market is relatively small and undeveloped and affected by space in larger centres such as Basildon.

Key Messages

2.77. Following the appraisal of key strategic policy, the core messages for Basildon Borough are summarised below:

- The Local Plan will need to be revised to make sure it is supporting the delivery of sub-regional and local economic strategies and initiatives;
- Any supporting SPDs/SPGs should be revised if monitoring has shown no progress or if the schemes are unviable, etc.
- Neighbouring areas are planning economic expansion over the next 10 - 20 years, with the Thames Gateway committed to helping deliver around 55,000 new jobs and 43,800 new homes to the Essex region by 2021.There are several major development schemes that will also impact on Basildon's economic competiveness in the B class market, particularly the opening of DP World London Gateway port in late 2013, which will create 12,000 jobs and approximately 850,000 sq.m of B class floorspace for the neighbouring borough of Thurrock. Basildon Borough's growth will have to respect this strategic context whilst working to retain its economic competitiveness by maintaining a broad and thriving industrial base.
- The Mayor of London is seeking to engage with authorities and relevant agencies outside of London to develop linkages across, and capacity of, nationally recognised growth areas, such as the Thames Gateway.

3. Socio-Economic Profile

Introduction

3.1. This section provides a summary profile of the prevailing socio-economic conditions in Basildon Borough. It aims to provide the socio-economic context which shapes employment land demand and supply factors in the study area. It provides an important context for understanding economic demand/need, having regard to the wider regional and national economies. Further detail is provided at Appendix B.

3.2. A telephone survey of 251 businesses located in the study area was conducted with owners, managers and directors to gain an understanding of the needs and aspirations of businesses in the study area. Further detail is provided at Appendix C.

Basildon Borough Socio-Economic Profile

3.3. The following represents the key findings of the socio-economic analysis of the Basildon Borough economy. This is derived from the Annual Business Survey Inquiry (ABI) covering the period 1998 to 2008 and the Business Register and Employment Survey (BRES) covering the period 2008 – 2011 produced by the Office of National Statistics, presenting financial and employment information about the UK economy. The Standard Industrial Classifications (SICs), which is used to classify the different industries, varies between the ABI and BRES datasets.

Employment

- Total employment in the Borough is 76,252 jobs[5] with an annual rate of growth of 1.4% over the period 1998–2011.
- Employment is dominated by three sectors Wholesale and retail trade; repair of motor vehicles and motorcycles (21%); manufacturing (14%) and human health and social work activities (13%).
- Growth in employment has been strong in education (8.2% pa) and electricity, gas, steam and air conditioning supply sectors (8.1% pa) over the period 2008 – 2011.
- There have been declines in employment in the finance and insurance activities (-11.4% pa) and administration and support service activities (-5.1% pa) sectors. Decline in both sectors is above the County and Regional averages over the period 2008 – 2011.
- At sub – sector level, education sector represents the largest proportion of employment (8.1%) and is the sub-sector that has seen the largest absolute growth in employment (1,265 jobs).
- Just over half the sub-sectors in decline in Basildon Borough are based in the manufacturing sector.
- B-use employment accounts for 52% of total employment in the Borough with manufacturing accounting for 26% of the total. Wholesale and retail trade accounts for 14%.
- In terms of industrial related employment, employment declined across all sectors except transport, storage and construction and real estate sectors.
- Warehousing related employment is over-represented in Basildon Borough in comparison to England and the region, and there has been annual growth of 1% pa, largely as a result of growth in warehousing, supporting and auxiliary transport activities and in wholesale activities. However, there has been a decline in employment in freight transport by road and post and courier activities.
- Unemployment has been declining between 2001 – 2012, however with the impact of the downturn, unemployment is beginning to rise and the JSA[6] claimant Count is now at 3.8%.

[5] Business Registrar and Employment Survey, Nomis, 2011

[6] Job Seekers Allowance ,2012

Businesses

- Business structure is dominated (79% of businesses) by micro businesses of 1 – 10 employees.
- Business growth 2007 – 2012 has been 6% per annum (faster than the county, regional and national average). This has been strongest in micro businesses (1-10 employees).
- Micro businesses and small businesses (11 - 49 employees) combined make up a total of 97% of employment.
- Micro businesses dominate most sectors except the energy and water sector.
- The overall level of entrepreneurial activity 2004 – 2010 (measured through VAT registrations per 1,000 population) has matched the wider region till 2007. 2008 saw a spurt in positive registrations, this remained above the regional average through the recession in 2009 / 2010 (latest available figures).
- The strongest sectors for entrepreneurial activity have been in the Construction, Wholesale, retail and repairs and Real Estate, renting and Business Activities sectors.
- The level of self employment as a percentage of the economically active population was much lower in Basildon Borough than in the wider areas up until 2010, indicating that enterprise levels are were weaker in the Borough. However, the most recent data (2010) shows that this could be changing.

Population and Labour Market

- Population growth in Basildon Borough (5.5%) has been slower than the regional (8.6%) and national (7.3%) averages over the period 1998 – 2011.
- The population profile broadly matches that of the County and region. Working age population is 65% of total population.
- During the period 2004 – 2012 the number of economically active people increased by 4.4% which is above county, regional and national averages.
- Average weekly wages are higher than the regional average, and national average. As might be expected due to the quantity of people commuting into London, the average wages for those living in the Borough but commuting for work are slightly higher as they commute out to better-paid jobs in other neighbouring areas.
- Wages have steadily increased between 2002 – 2011 despite the economic downturn.
- The Borough has a relatively high proportion of people employed as managers and senior officials as well as associated professional and technical occupations and administrative and secretarial occupations.
- The proportion of working age population with qualifications in the Borough is broadly in line the regional and county levels.

Business Survey – Key Findings

3.4. A telephone survey of 251 businesses located in the study area was conducted with owners, managers and directors to gain an understanding of the needs and aspirations of businesses in the study area. The findings of the business survey are set out in the Business Survey Results Appendix C. The findings from the business survey, in particular the need for new business floorspace, provide a useful way of checking the land requirements that are identified through the study forecasting work (section 7).

3.5. Key findings from the business survey for Basildon Borough:

- Businesses have a localised workforce 64% live within 10 miles, sectors such as construction (57%) and information and communication (56%) tend to have a lower proportion of employees from within 10 miles of work. Large companies have the lowest proportion of employees that live within 10 miles.
- There are a high proportion of local customers, 85% from within Essex.
- There are high levels of satisfaction with current business premises, with only 5% of businesses responding that current premises are unsuitable.
- For those that did feel premises were unsuitable the key reason for premises being unsuitable was that they are too small, premises are old and/or poor condition.
- Businesses are fairly optimistic with 31% planning to expand. Small and medium businesses had the highest proportions of businesses wanting to expand. Businesses in

Basildon (32%), Billericay (29%) and Wickford (27%) showed the highest proportions wanting to expand.

- 15% of businesses have considered relocating. Small and medium sized businesses and those in the information and commercial sector are most likely to consider relocating. 18% have considered a location within Brentwood and 11% have considered locating in Chelmsford.
- When considering relocation dedicated industrial areas (56%) are the most popular locations, followed by town centre/commercial districts (22%) and mixed use areas (22%).

3.6. Of those businesses in Basildon Borough that wanted to expand 47% said that this would lead to a need for additional floorspace, and over half (61%) of these said that they would be unable to accommodate their additional floorspace needs at their existing premises (either through extension, refurbishment, redevelopment or more intensive use).

3.7. By using the data from Table B.16 survey and applying this to the findings of the socio-economic assessment (see Table B.16 in Appendix B) about the number of B-class businesses in the Borough, estimates can be provided of the total expansion requirements of indigenous businesses in the study area. The estimate for Basildon Borough is that existing businesses would require approximately 68,000 square metres over the next 5 years. Businesses may choose to move to new premises (either within or outside Basildon Borough) to meet these needs and therefore vacant floorspace within the Borough will be crucial in helping businesses to meet some of these needs. In order to help support the growth and expansion of local businesses the Council should be supportive of proposals for the expansion of existing business premises, where they meet local plan policies.

3.8. Analysis of those businesses that will require additional floorspace shows that these are mostly businesses in the manufacturing sector.

The Basildon Business Group – Key Findings

3.9. The Council has also been in consultation with the business community through the recent consultation on the Core Strategy Preferred Options Report. The main points they raised in their consultation response include:

- Concerns that there is not sufficient land which is 'ready to go' in locations desirable to occupiers or provide a framework for the delivery of sites;
- Concerns that is not a range of sites for new businesses or for the retention of existing businesses in the Borough, in particular which are readily available for a development of 9,290 sq.m.
- Concerns about the policy of infill and intensification will limit the ability for Basildon Borough to attract new business investment, put at risk the retention of expanding local companies, and not provide the range of serviced and deliverable sites needed for a town with such a large regional economy
- The BBG set out a very broad estimate of future B-class employment land requirements (based on an assumption of 153 jobs per hectare taken from the HCA/Drivers Jonas Deloitte Employment Densities Guide). Depending on the Option, BBG estimate that between 13.1ha to 123.7ha would be required. However this estimate has caveats and does not provide a breakdown in terms of the composition of B-class employment.

3.10. The BBG states that a positive future for Basildon Borough must be built on its continued economic strength and must be supported by the attraction of new investment through ensuring that sufficient land is available in the best possible locations to do so.

SWOT

3.11. Table 1 sets out a SWOT (strengths, weaknesses, opportunities and threats) analysis for the study area in terms of its economic conditions and future prospects. This summarises the implications of the study areas social and economic characteristics for planning for economic development.

Table 1. SWOT Analysis for Basildon Borough

Strengths	Weaknesses
• Several strategic roads service the Study Area, including the A127 (Enterprise Parks Corridor, A130 and A13, offering good road access to London and many settlements in Essex. • Basildon Borough's industrial market is performing well, due to its well-established industrial areas that accommodate a range of businesses and multinational companies, including Ford Motor Company, Selex Galileo, First Data, MK Electric, Case New Holland and IFDS.	• Basildon Borough's poor image in the office market and faces stiff competition from key centres, including Chelmsford and Brentwood.
Opportunities	**Threats**
• The town centre masterplans for Basildon and Wickford could improve the office market image and improve the health of the town centres and provide the most sustainable locations in the study area. • Demand for employment development in Basildon Borough is relatively strong.	• Major Development Schemes in Thurrock (DP World and Tilbury Port) provide a good supply of larger industrial premises that Basildon Borough will need to compete with to attract new investment. • Limited land available for employment expansion given Green Belt constraints. • Much recent employment growth has occurred in the public sector (such as education), this is likely to be more limited / cut back in the coming years.

4. Analysis of Local Property Market

Introduction

4.1. This section provides an examination of the Basildon Borough market for B-class uses drawing upon the EGI commercial property database to identify 'market signals', such as vacancy rates, stock and rental levels by location and property type. The following provides a summary of our property market research, it provides detail on recent market activity across the Borough according to the main property market indicators, including rents, investment deals and leasing activity and discussions with local property agents.

Property Market Indicators

4.2. The property market indicators that were analysed for Basildon Borough include rents, investment deals and leasing activity using the EGI market data and discussions with local commercial property market agents. Comparisons were made against other key centres within Essex, including Brentwood, Chelmsford, Thurrock and Southend-on-Sea.

Rents

Office

4.3. Typical monthly rents for office premises currently marketed, range from £33 - £215 per sq.m, with higher quality offices (new build) having asking rents of £86 - £215 per sq.m, according to the EGI market data. Local commercial property agents identified that in Basildon Borough new office accommodation typically achieved rental values of £70 - £81 per sq.m and older office accommodation typically achieved around £43 per sq.m.

4.4. In comparison, Chelmsford and Brentwood achieved higher starting rents at £98 - £205 per sq.m and £62 - £269 per sq.m, respectively. Southend-on-Sea and Thurrock achieved lower than Basildon Borough at £61 - £149 and £54 - £162 sq.m, respectively.

4.5. Figure 1 identifies the average monthly rental value of industrial and office floorspace for Basildon Borough and the other key centres. Average office floorspace in Basildon Borough was valued at £105 per sq.m, which is lower than Brentwood, Chelmsford and Southend-on-Sea but marginally higher than Thurrock. Brentwood achieved the highest average monthly rental value of £171 per sq.m.

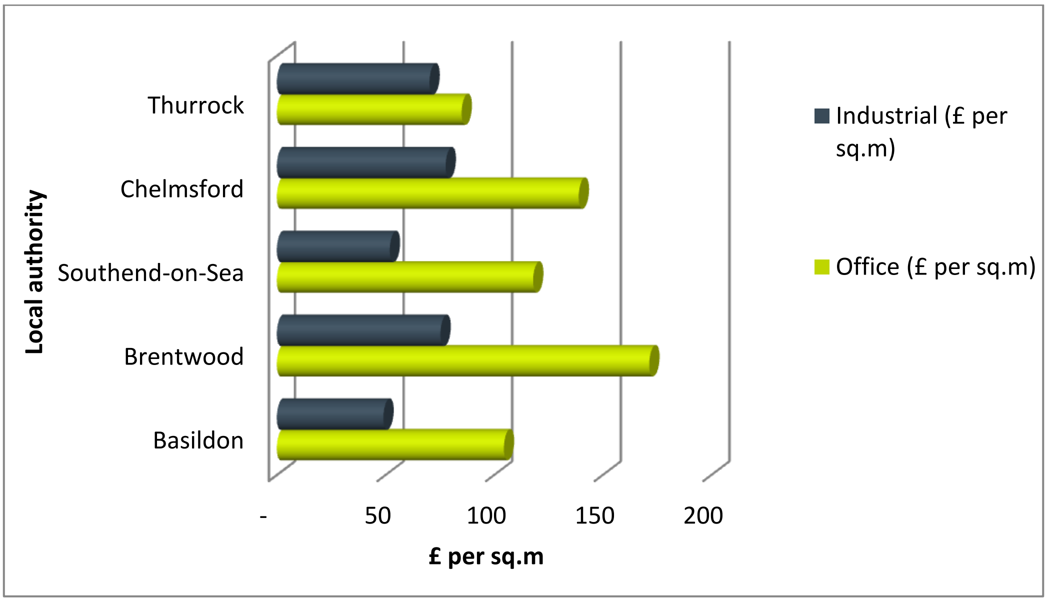
Industrial

4.6. Rents for the majority of mixed industrial premises (B1/B2/B8) currently on the market range between £20- £105 per sq.m, according to EGI market data. Local commercial property agents identified that in Basildon Borough industrial premises typically achieved rental values of £43 - £75 per sq.m.

4.7. In comparison, Southend-on-Sea and Brentwood achieved similar rates of £27 - £96 per sq.m and £20 - £95 per sq.m, respectively. Chelmsford and Thurrock achieved higher starting rents at £38 - £108 per sq.m and £32 - £91 per sq.m.

4.8. Average industrial floorspace in Basildon Borough was valued at £49 per sq.m, which is lower than the other neighbouring Boroughs and comparable to Southend-on-Sea that achieved £52 per sq.m. Chelmsford achieved the highest average monthly rental value of £78 per sq.m.

Figure 1. Average monthly rental value of industrial and office floorspace (£ per sq.m)



Source: Atkins based on EGI data, 2011/2012

Investment Deals

4.9. The volume of transactions across Essex has been low in recent years as occupiers retrench in the recessionary conditions. There have been limited investment transactions in both office and industrial sectors in Basildon Borough between 2010 – 2012, with three sales for industrial units and no sales recorded for office units. In comparison, its neighbours achieved slightly more investment activity. Chelmsford achieved a low level of sales with five office and four industrial sales; Brentwood achieved six office and three industrial sales; Southend-on-Sea achieved three office and three industrial sales and Thurrock achieved six office sales and four industrial sales. This reflects the risk adverse nature of the current economic climate.

Leasing Activity

Office

4.10. In comparison to investment deals, there has been a consistent stream of leasing activity in Basildon Borough particularly for industrial space. New office leases in Basildon Borough totalled 4,703 sq.m between 2010 and 2012 and have been for typically small-medium sized premises between 55 sq.m and 400 sq.m. Its neighbours achieved similar levels of investment activity in office space, with Chelmsford achieving 4,794 sq.m for office leases, which was for mainly medium-large sized units (between 160 sq.m - 510 sq.m), whilst Brentwood achieved a 4,904 sq.m for office leases, which was for mainly small-medium sized units (40 sq.m - 250 sq.m). Local commercial property agents identified that leasing inquiries for office space tended to be for small-medium sized units under 930 sq.m.

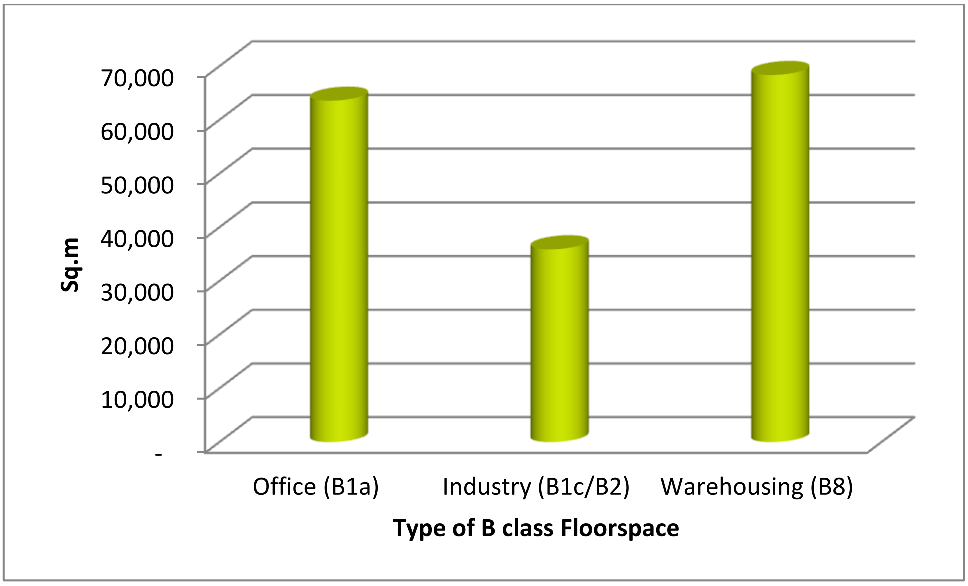
Industrial

4.11. New industrial leases in Basildon Borough have totalled 32,189 sq.m between 2010 and 2012 and has been for typically small-medium sized premises (between 41 sq.m - 350 sq.m), which is much higher than Chelmsford that achieved 4,298 sq.m of industrial leases for typically small-medium sized premises (between 50 sq.m – 415 sq.m). The quantity of leased industrial space is much lower than Thurrock, which achieved 90,348 sq.m for typically large sized premises (between 900 sq.m - 8,000 sq.m). Local commercial property agents identified that leasing inquiries for industrial space tended to be for larger units between 650 and 743 sq.m.

B-class Commercial Property Market

4.12. Figure 2 shows the distribution of existing B-class commercial floorspace by sector. The EGI data identifies that Basildon Borough has over 167,845 sq.m of actively market vacant B-class use employment floorspace. The majority of this existing B-class commercial floorspace is concentrated in the warehousing market (B8 use class), which has a 41% share that equates to some 67,413 sq.m of floorspace, which is followed by the office market with a 38% of the market with around 63,581 sq.m of floorspace.

Figure 2. Total Stock of actively marketed vacant B-class Employment floorspace in Basildon Borough



Source: Atkins based on EGI data

4.13. According to local commercial property agents, new enquiries from companies looking to relocate to new premises are mainly local, with the exception of a few enquiries to the east from Rayleigh. Basildon Borough is well-known as a desirable industrial location but has a poor image as a location of office activities according to local commercial property agents. Basildon Boroughs industrial / storage & distribution and office markets are considered in further detail below, along with other major commercial developments in Essex.

Industrial

4.14. The major industrial estates in Basildon Borough are located in a linear corridor that is bounded to the north by the A127 and to the south by Cranes Farm Road (B148/A1235). The major employment sites include Burnt Mills, Cranes Industrial Estate, Case New Holland Tractor Park, Festival Business Park, Pipps Hill, Laindon North, and Ford Technical Centre.

4.15. The industrial estates support a range of business and multinational corporations, including Case New Holland, Ford Motor Company and SELEX ES on a mixture of old and more modern premises for light industry, general industry and storage and distribution activities. Local commercial property agents consider these major industrial users to be a major pull factor for new occupiers. A detailed analysis of the industrial areas is provided in chapter 6.

4.16. The Ford Dunton Technical Centre has secured Basildon Borough’s reputation as a centre for automotive research and development. Basildon Borough also accommodates the Case Holland Tractor Park, opened in 1964 which specialises in the manufacturing of tractors. Case New Holland is a US-based global company, with the majority owned by FIAT International and is one of the top 15 UK exporters.

4.17. The concentration of industrial activities within well-managed industrial estates along the strategic road corridor of the A127 has improved Basildon Borough’s competitive edge as a location for industrial, manufacturing and warehouse related B-class employment activities.

4.18. Local property agents agreed that Basildon Borough’s industrial market is performing well, due to its well-established industrial estates and strategic transport connections.

Office

4.19. Basildon Borough's office market is much smaller when compared to the industrial market. Much of this office space is used as supplementary accommodation by the industrial / storage & distribution businesses. There are a few single-occupier sites located within the industrial areas and on strategic road links, such premises include International Financial Data Services (IFDS) that benefits from direct access to the A1235.

4.20. Local commercial property agents confirmed that Basildon Borough is not typically viewed as a desirable office location. Chelmsford and Brentwood are considered to be more desirable and attractive locations for office activities (due to premises quality and the attractiveness the town centre offer) and typically attract rental values of around £204 per sq.m, in contrast to Basildon Borough's estimate £70 - £81 per sq.m.

4.21. Office accommodation is also located within the key town centres of Basildon, Billericay and Wickford. The quality of office space within these town centres is of a low quality and the image and quality of these locations could be improved to attract new and larger investors. Currently the market is dominated by small local firms that only require low quality affordable floorspace.

4.22. According to local commercial property agents, a growing number of office inquiries have been for Billericay, which benefits from direct train connections to London Liverpool Street station in around 35 minutes. There have been no inquiries for Wickford, which is not considered to be an attractive location for offices. Premises in Wickford are typically above shops, the type and quality of accommodation and facilities available in the centre mean that Wickford is not seen as a prime office location.

4.23. Basildon Borough Council is committed to regenerate and redevelop the quality and quantity of office floorspace and overall environment to its five town centres. An approved masterplan for Basildon town centre supports 25,000 sq.m of office (B1 use class) commercial development as part of a mixed use regeneration strategy. There is also an approved masterplan for Wickford town centre with aspirations for securing investment for 650 new jobs and 1,000 square metres of mixed commercial development.

4.24. Local property agents agree that the quality of office accommodation in Basildon town centre is poor. In addition, there is a lack of car parking and some of the office premises that have been vacant for a while have high commercial service charges. For example Northgate house has a commercial service charge of £178 per sq.m, in comparison to Phoenix House and Acorn House both have recently been leased and have a lower service charge of £43 - £52 per sq.m respectively.

4.25. Local property agents consider that Basildon Borough's poor image in the office market is unlikely to change quickly (as it would take considerable time to implement proposed regeneration plans and build-up a positive locational reputation in the office market), due to the stiff competition it faces from the more successful and established key centres of Chelmsford and Brentwood. In addition, they noted that new enquires for office space tended to be for small-medium sized units under 930 sq.m.

Other Major Commercial Developments in Essex

4.26. This section identifies forthcoming major commercial development schemes in neighbouring Boroughs within Essex that could potentially impact on Basildon Borough's economic aspirations and competitive advantage.

London Gateway Port, Thurrock

4.27. The DP World London Gateway located in Thurrock will be the UK's first deep-sea container port as well as Europe's largest logistics park when it opens later in Winter 2013. London Gateway provides six berths along a 2.7km quayside and capacity to handle ultra-large container ships. A railway line for transporting freight nationally is also under construction. More than 12,000 people will work directly for the London Gateway when the scheme is fully operational, which is anticipated to be the fourth quarter of 2013.

4.28. London Gateway has planning approval for the UK's largest Logistics Park, which will provide approximately 850,000 sq.m of accommodation, which is primarily B8 warehousing along with some general and light industry, research accommodation and associated service facilities such as retail and a hotel.

4.29. The Park comprises a total of 227 hectares, which includes the main Park infrastructure corridors incorporating the roadways, service corridors and the Sustainable Urban Drainage System (SUDS). When these infrastructure corridors are deducted, there are approximately 183 hectares of developable plot areas for employment uses.

Tilbury Port Expansion, Thurrock

4.30. Outline planning permission has been granted for up to 86,500sq.m of commercial development for business, industrial, storage and distribution uses. It is anticipated that an additional 1,178 jobs will be created from the expansion scheme. Owner Forth Ports and Roxhill Developments recently announced a joint venture to develop the scheme.

Beaulieu, Chelmsford

4.31. Countryside Properties and its development partner L&Q have received outline planning consent from Chelmsford City Council for the development of Beaulieu, a major new £1 billion neighbourhood in North East Chelmsford. The new neighbourhood includes up to 3,600 new homes and includes a site for a new railway station on the East Anglian main line. The proposals also include up to 62,300 sq m gross employment floorspace, incorporating a leading-edge 40,000 sq m business park, which could create 3,500 new jobs.

London Southend Airport

4.32. Southend Borough Council and Rochford District Council are preparing a Joint Area Action Plan (JAAP) to respond to the challenges and opportunities offered by London Southend Airport and its surrounding area.

4.33. The JAAP will provide the basis for coordinating the actions of a range of partners with an interest in London Southend Airport and its surrounding area, and establish planning policies until 2021. It will seek to direct investment and form the basis for regeneration in the area, which could result in additional B class employment generating uses.

Conclusion

4.34. The majority of actively marketed B-class commercial floorspace is concentrated in the industrial market (B1b and B2 use classes), which has a 37% share of the total stock. The volume of commercial investment transactions for employment premises (B Use Class) has slowed due to the recent recession. However, between 2008 and 2012 there has been a consistent stream of leasing activity within the Borough, which indicates that key centres within Essex may have been less affected than other parts of the UK, due to its proximity to, and travel links with central London.

4.35. Basildon Borough's industrial market is performing well, due to its well-established industrial estates concentrated along the A127 Enterprise Parks Corridor and strategic transport connections. Agents noted that new enquiries for industrial space tended to be for larger units, whilst demand for office space is generally for small-medium sized units. Basildon Borough faces competition from the key centres of Thurrock and Brentwood that have provided a good supply of larger industrial premises in recent years and new development coming forward in Thurrock (DP World and Tilbury Port) is likely to exacerbate this.

4.36. Basildon Borough's office market is much smaller when compared to the industrial market. The majority of this office space is used as supplementary accommodation by the industrial / storage & distribution businesses with a few single-occupier sites located within established industrial areas. Office accommodation in the town centres is considered to be generally poor quality and suffers from a lack of free/dedicated car parking for office buildings and high commercial service changes. Basildon Borough's poor image in the office market is unlikely to change quickly, and will be reliant on town centre regeneration schemes. Basildon Borough also faces stiff competition from the more successful and established key centres of Chelmsford and Brentwood.

5. Supply of Employment Land

Introduction

5.1. This chapter provides an overview of the total stock of existing B-class employment land and provides the headline results of the comprehensive review of employment sites and premises within Basildon Borough. The results of this analysis provide the basis upon which to consider how future employment land requirements (detailed in chapter 7) can be met.

Total Stock

5.2. Valuation Office Agency (VOA) data provides the most recently available details of business units in Basildon Borough that are subject to business rates. The VOA assesses the 1.8 million non-domestic properties in England and Wales that are liable for business rates and collects information on these properties, including the type of property, the location, the floorspace and rateable value.

5.3. The VOA data (see Table 2) identifies that Basildon Borough has over 1,355,649 sq.m of B-class use employment floorspace. The majority of this floorspace is general/light industry (B1c/B2) with a 38% share of total B-class employment floorspace, which is followed by office (B1a) with a 24% share and warehousing (B8) with 18% share of total B-class employment floorspace, respectively.

Table 2. Total Stock of B-class Employment Land

Location	B1a (sq.m)	B1b (sq.m)	B1c/B2 (sq.m)	B8 (sq.m)	Total
Existing Employment Site[7]	247,629	250,476	475,057	243,412	1,216,574
Other Employment Areas[8]	81,861	0	33,730	23,484	139,075
Total (sq.m)	**329,490**	**250,476**	**508,787**	**266,896**	**1,355,649**
Total (%)	24%	18%	38%	20%	100%

Source: Atkins based on VOA and EGI data [9]

5.4. Table 3 provides an indication of the average size of different B-class premises in Basildon Borough. Average office premises (B1a) are the largest at 359sq.m, followed by industrial (B1c/B2) (321sq.m) and warehousing (B8) (200sq.m). The overall average for all premises is 293sq.m. Many of the businesses in the Borough are small, and this is clearly reflected in the small size of average business premises.

[7] Employment Sites that have been identified by Basildon Borough Planning Officers for the site appraisal (see Chapter 6).

[8] Employment Sites that are outside of the ‘existing employment sites’ identified by Basildon Borough Planning Officers for the site appraisal (see Chapter 6).

[9] Floorspace estimates have been made for Site 11 Ford Technical Centre and Site 5 – Case New Holland Tractor Park

Table 3. Average Size of Premises (sq.m)

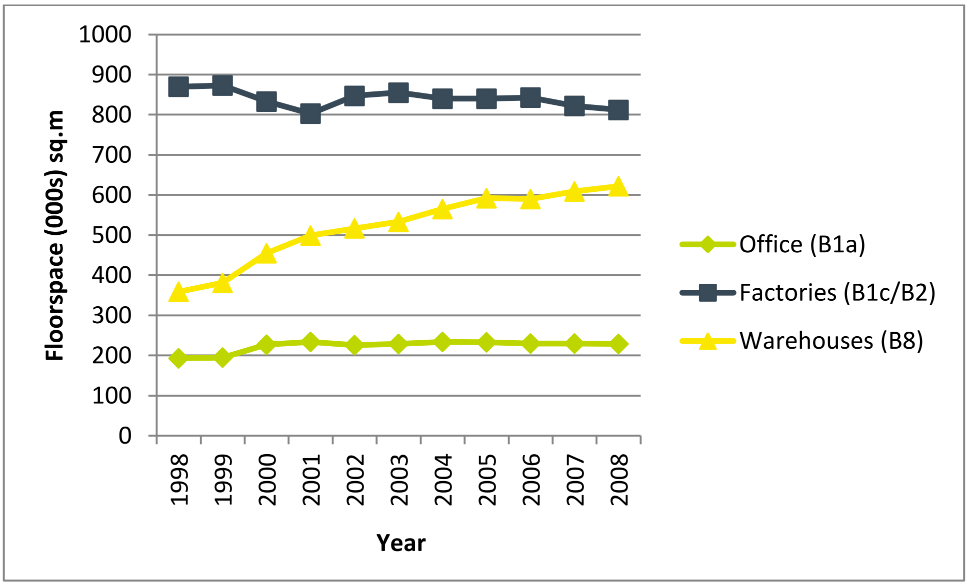
Borough	B1a (sq.m)	B1c/B2 (sq.m)	B8 (sq.m)	Total
Existing Employment Site[10]	321	506	295	374
Other Employment Areas[11]	398	137	105	213
Average (sq.m)[12]	**359**	**321**	**200**	**293**

Source: Atkins based on VOA data, 2010 [13]

5.5. There is some variation in average premises size in existing employment sites and other employment areas. The existing employment sites generally have premises that are slightly larger than the overall average in each premises type, apart from office (B1a). The other employment areas has larger average office premises (398sq.m), but much smaller industrial premises (137sq.m) and warehousing (105sq.m) compared to the existing employment sites.

5.6. Figure 3 presents estimates of total B-class use floorspace in Basildon Borough for 1998 to 2008 using Valuation Office Agency (VOA) data (latest available data). Warehouse floorspace has been slowly increasing over the 10 year period. Factory floorspace initially declined and had a slight increase (between 2000 and 2003) that remained steady until 2006 where it has started to decline. The total stock of office floorspace has remained steady over the 10 year period.

Figure 3. B-class Floorspace in Basildon Borough 1998 - 2008



Source: VOA – Commercial and Industrial Floorspace and Rateable Value Statistics (1998 – 2008)

5.7. Basildon Borough's network of town centres provide key locations for major B-class employment activity with clusters of employment activity concentrated in Basildon, Billericay and Wickford, as

[10] Employment Sites that have been identified by Basildon Borough Planning Officers for the site appraisal (see Chapter 6).

[11] Employment Sites that are outside of the 'existing employment sites' identified by Basildon Borough Planning Officers for the site appraisal (see Chapter 6).

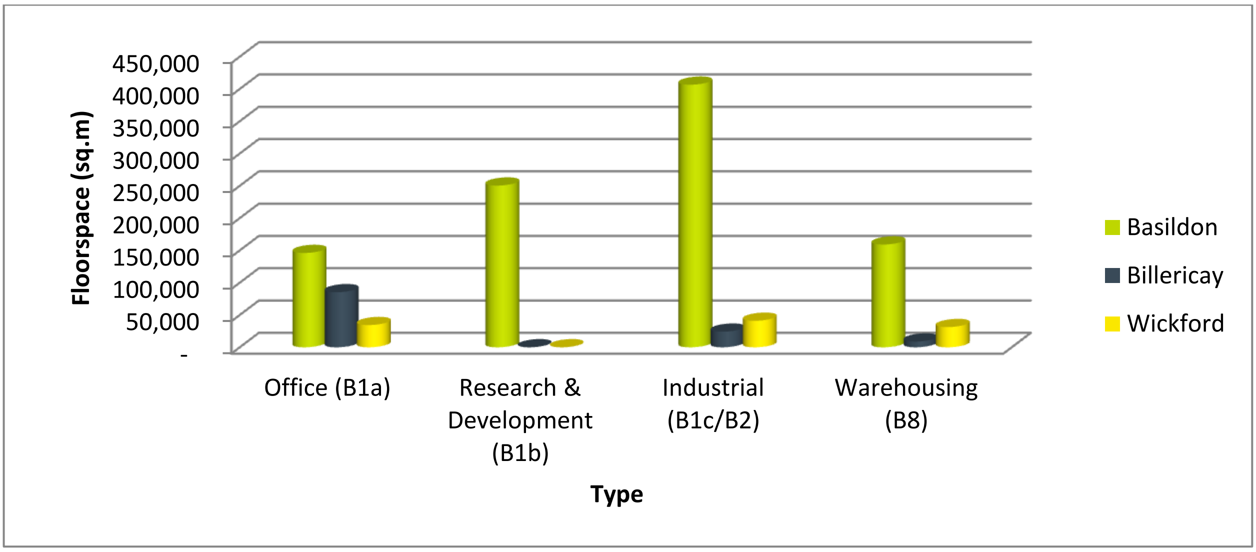
[12] Excludes B1b premises

[13] There are only two premises recorded as B1b use class that have a combined floorspace of approximately 125,238 sq.m of floorspace. Floorspace assumptions have been made for both of these sites, which include Site 5 – Case New Holland, Site 8 IFDS and Site 11 Ford Technical Centre.

shown in maps 13a, 13b and 13c in Appendix G. These locations provide good strategic transport road and public transport links and good access to local amenities and facilities within the town centre location.

5.8. Figure 4 shows the spatial distribution of occupied floorspace by the key settlements of the Borough (Basildon, Billericay and Wickford). Basildon Borough has the highest concentration of B-class employment uses, as the key employment area of the Borough runs along the A127 Corridor, which accommodate a range of businesses and multinational companies, including Ford Motor Company, Selex ES, First Data, MK Electric, Case New Holland and IFDS.

Figure 4. B-class floorspace by Key Settlement Locations



Source: Atkins based on VOA data[14]

Existing Employment Sites

5.9. In Basildon Borough a total of 24 employment sites (including the three main town centres Basildon, Billericay and Wickford) were identified by Basildon Borough Council Planning Officers for site assessment. The sites are identified on the Borough overview Map in Appendix F and on the individual site plans in Appendix G. It should be noted that Basildon University Hospital, Marsh Farm and Barleylands were originally identified by the Council as employment sites but were excluded from the site assessment process as they did not contain any B-class uses when verified during site visits.

5.10. The employment sites are distributed throughout the key towns of Basildon, Billericay and Wickford. There are also some sites located within the rural areas of the Borough, as shown in Table 4. The largest concentration of floorspace is located at Site 11 - Ford Technical Centre and Site 5 - Case New Holland Tractor Park, which are single occupier sites that have a 24% and 23% share of the total B-class floorspace in existing employment sites, respectively. Both of these sites are occupied by multinational companies and benefit from strategic access to the A127 Corridor.

In addition to the 1,053,822 sq.m of occupied B-class floorspace in existing employment sites, there is 133,980 sq.m of occupied B-class floorspace in ‘other employment sites’.

[14] There are no Research and Development uses (B1b) recorded in the town centres.

Table 4. Total Occupied B-class Floorspace in Existing Employment Sites

Sites	Sub Area	Land Area (sq.m)	Total B-class Floorspace in existing employment sites (sq.m)	Percentage Share of Total B-class Floorspace in existing employment sites (%)
1 - Wickford Business Park	Wickford	360,700	64,120	6.1%
2 - Radford Way	Billericay	140,500	20,286	1.9%
3 - Burnt Mills	Basildon	852,500	83,190	7.9%
4 - Cranes Industrial Estate	Basildon	801,500	112,038	10.6%
5 - Case New Holland Tractor Park	Basildon	397,400	239,962	22.8%
6 - Festival Business Park	Basildon	211,500	16,370	1.6%
7 - Pipps Hill, Basildon	Basildon	598,700	50,206	4.8%
8 - IFDS, Basildon	Basildon	52,100	1,005	0.1%
9 - Laindon North	Basildon	91,300	14,507	1.4%
10 - Wrexham Road	Basildon	45,400	9,141	0.9%
11 - Ford Technical Centre	Basildon	783,900	250,476	23.8%
12 – Southfields	Basildon	405,300	77,183	7.3%
13a - Basildon town centre	Basildon	719,200	19,984	1.9%
13b - Billericay town centre	Billericay	120,400	51,574	4.9%
13c - Wickford town centre	Wickford	200,100	25,852	2.5%
14 – Guildprime	Rural	15,500	1,647	0.2%
15 - White Bridge Farm	Rural	26,600	164	0.0%
16 - London Road Clusters	Rural	24,400	1,778	0.2%
17 - Vange Wharf	Rural	30,600	1,604	0.2%
18 - Pitsea Hall Lane	Rural	20,400	680	0.1%
19 - Sadlers Farm	Rural	12,600	9,145	0.9%
20 - Blue House Farm	Rural	10,600	455	0.0%
21 - Annwood Lodge	Rural	25,300	1,889	0.2%
22 - London Road, Vange	Rural	4,400	565	0.1%
Total		**5,950,900**	**1,053,822**	**100.0%**

Source: Atkins based on VOA data[15]

Sources of Employment Floorspace Supply

5.11. The Borough has a number of potential sources that could bring forward new employment floorspace, as follows:

Vacant Floorspace

5.12. The EGI availability data has been analysed to give an indication of the current availability of B-class floorspace. Table 5 identifies the amount of vacant floorspace in the Borough including all vacant floorspace that is in the EGI database. It should be noted that there may be other floorspace currently available that is not currently being marketed.

[15] Floorspace assumptions have been made for Site 5 – Case New Holland, Site 8 IFDS and Site 11 Ford Technical Centre.

5.13. The EGI data identifies that Basildon Borough has over 167,845 sq.m of B-class use floorspace that is being actively marketed; the majority of this is B8 use class with some 67,413 sq.m, which is close followed by B1a use class with some 63,581sq.m.

Table 5. Vacant Floorspace by Use Class (sq.m)

	B1a	B1b	B1c/2	B8	Total
Existing Employment Sites	59,718	0	36,427	66,607	162,751
Other Employment Sites	3,863	0	425	807	5,094
Total	**63,581**	**0**	**36,852**	**67,413**	**167,845**

Source: Atkins based on EGI data. Figures in the table are rounded

5.14. Vacancy rates have been identified in Table 6 by considering the vacant floorspace identified in Table 5 as a percentage of total B-class floorspace in Table 2.

5.15. There is currently a vacancy rate of 12% of all B-class floorspace in the Borough. The highest proportion of vacancy is in existing employment sites, with the highest concentration in B1a and B8 use classes with a vacancy rate of 19% and 25%, respectively.

Table 6. Vacancy Rate by Use Class (sq.m)

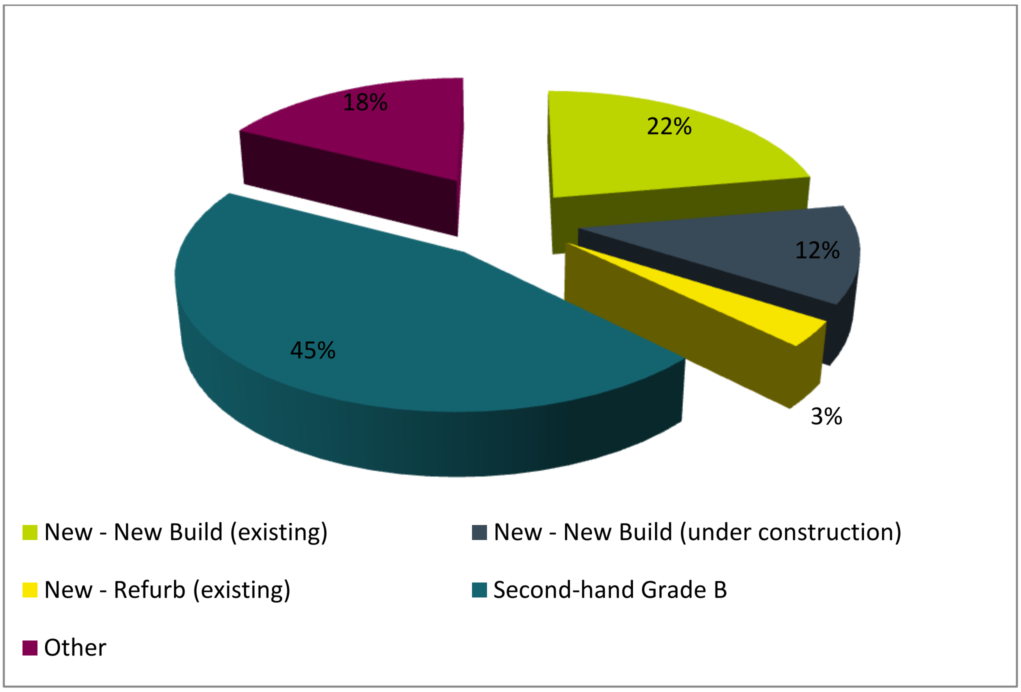
	B1a	B1b	B1c/B2	B8	Total
Existing Employment Sites	24%	0%	8%	27%	13%
Other Employment Sites	5%	0%	1%	3%	4%
Total	**19%**	**0%**	**7%**	**25%**	**12%**

Source: Atkins based on EGI and VOA data

5.16. Figure 5 shows the quality of the vacant premises within existing employment areas. Second hand-B-class floorspace constitutes less than half of the existing B-class floorspace (45%) within the existing employment areas. New buildings (existing and under-construction) provide around 22%, whilst newly refurbished premises provide around 3% of the total stock of existing employment floorspace. New/refurbished premises are more attractive to new investors and potentially are more likely to be occupied more quickly than second-hand buildings.

5.17. The detailed site appraisals in chapter 6 set out in more detail the quantum of vacant B-class units and the general age and quality of the sites.

Figure 5. Quality of B-class Floorspace in Existing Employment Sites



Source: Atkins based on EGI data[16]

5.18. Table 7 provides an analysis of vacant floorspace by employment areas. The main concentration of vacant office floorspace (B1a) is located in Site 4 - Cranes Industrial Estate with a 23% share and Basildon town centre with an 18% share. The main concentration of vacant industrial space is located in Site 4 - Cranes Industrial Estate, which has some 11,350sq.m of vacant B1c/B2 floorspace and some 18,383sq.m of vacant B8 floorspace.

5.19. Site 4 – Cranes Industrial Estate has the largest concentration of vacant floorspace at 44,197sq.m and the highest concentration of vacancy across all B use classes. It was the first of the Borough's large industrial estates to be built, therefore has some of the oldest building stock and amenity/highway infrastructure. The highest concentration of vacant mixed industrial (B1/B2/B8) is marketed as a design and build opportunity known as 'Gateway Basildon' located on Christopher Martin Road and facing onto the A127. This new development is to provide some 16,025sq.m of light industrial, industrial or warehouse floorspace.

5.20. Within Basildon town centre, the largest concentration of vacant office space is at Southernhay House and Northgate House, which have 6,237sq.m and 3,577sq.m of vacant office floorspace, respectively.

[16] Sites classified as 'other' do not have information about their quality in the EGI database.

Table 7. Vacant Floorspace by Employment Site (sq.m)

	Office B1a (sq.m)	Light/ General Industrial B1c/B2 (sq.m)	Warehouse/ Storage & Distribution (B8) (sq.m)	Total (sq.m)
1 - Wickford Business Park	3,439	4,802	5,758	13,999
2 - Radford Way	2,884	0	2,232	5,116
3 - Burnt Mills	4,874	6,956	14,898	26,728
4 - Cranes Industrial Estate, Basildon	14,464	11,350	18,383	44,197
6 - Festival Business Park	879	1,319	2,198	4,395
7 - Pipps Hill	5,309	2,497	5,115	12,921
9 - Laindon North	1,176	1,672	2,786	5,634
10 - Wrexham Road	90	0	0	90
12 – Southfields	9,663	7,089	13,824	30,576
13a - Basildon town centre	11,597	0	0	11,597
13b - Billericay town centre	2,558	0	90	2,648
13c - Wickford town centre	1,447	0	0	1,447
15 – White Bridge	842	0	88	930
17 - Vange Wharf	495	742	1,237	2,473
Other Employment Areas	3,863	425	807	5,094
Total	**63,581**	**36,852**	**67,413**	**167,845**

Source: Atkins based on EGI data[17]

Commercial Development Pipeline

5.21. The Non-Residential Land Availability Survey undertaken by Essex County Council records selected planning permission in the Essex area as part of the monitoring process.

5.22. In Basildon Borough there are valid but as yet unimplemented B use class planning permissions, which would result in a total net gain of 7,050 sq.m of B-class floorspace. The largest net gains if the permissions were implemented are in mixed industrial floorspace and there would also be gain in office floorspace, as identified in Table 8.

Table 8. Summary of B-class Floorspace Unimplemented Permissions

Use Class	Proposed (sq.m)	Potential Loss of B-class floorspace (sq.m)	Net (sq.m)
Office B1(a)	2,998	1,567	1,431
Mixed Industrial B1- B8 (excluding B1a)	6,849	1,230	5,619
Total	**9,847**	**2,797**	**7,050**

Source: Non-Residential Land Availability Survey, April 2012, Essex County Council

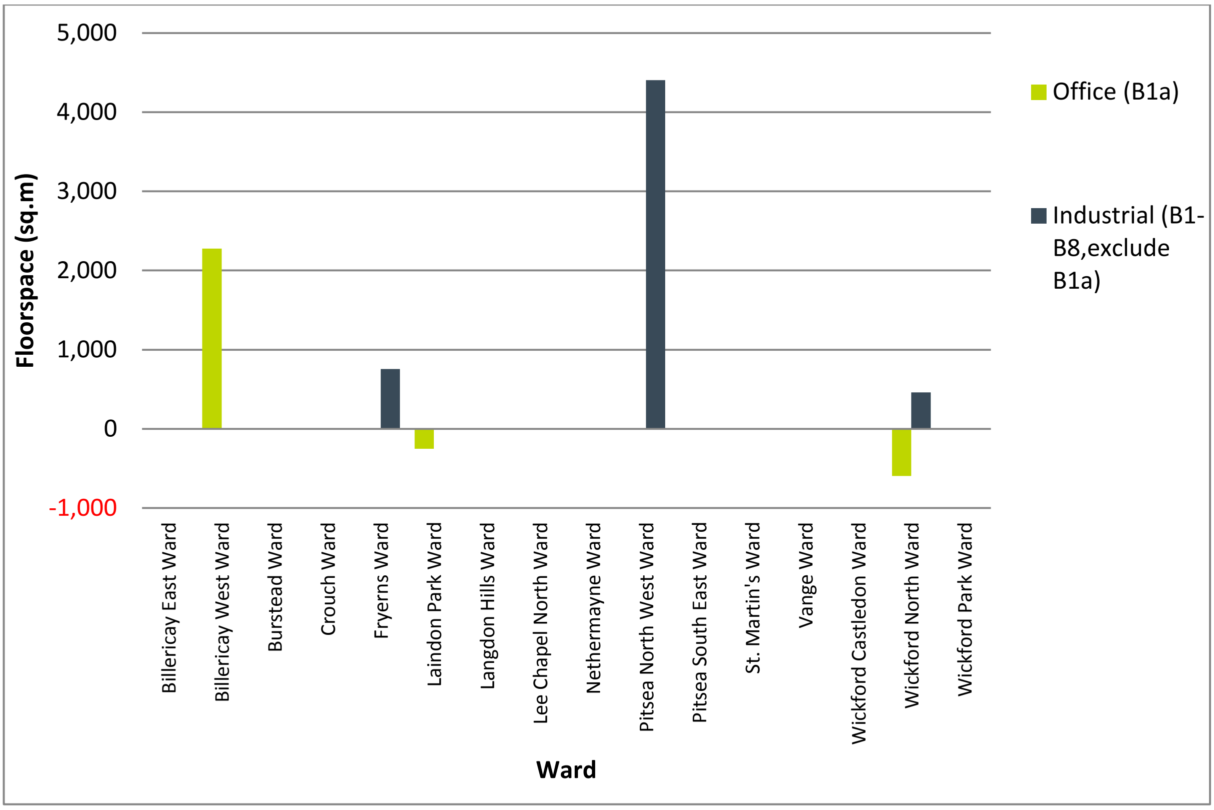
5.23. The Non-Residential Land Availability Survey 2012 provides data on the changes of Basildon Borough's commercial floorspace between 1 April 2011 and 31 March 2012, focussing particularly on B use classes.

[17] Sites not included in this table do not have actively marketed vacant floorspace in the EGI database

5.24. Figure 6 shows the unimplemented permissions by postcode area. Billericay West Ward had a significant amount of unimplemented B1a office space at some 2,277 sq.m and Wickford North Ward had the greatest loss of B1a office space from unimplemented development permission.

5.25. Pitsea North West Ward had the largest amount of unimplemented mixed industrial floorspace at some 4,403 sq.m and there were no losses of mixed industrial floorspace recorded in any of the other wards. In all of these sub-areas, the loss of floorspace was located in existing employment areas that were protected for employment uses in the Saved Local Plan policies.

Figure 6. Net B-class Floorspace Unimplemented Permissions by Ward



Source: Annual Monitoring Report 2011/2012

Key Employment Site Allocation (Saved Policies in the Local Plan)

5.26. The Saved Policies form part of the development plan for Basildon Borough and remain in place. The policies protected a number of specific site allocations for potential B-class development that are set out in detail below:

- Gardiners Lane South (protected under BAS E1) is a property asset of the Homes and Communities Agency and has not been brought forward for some 16.2 ha of B-class development as part of a mixed use scheme. Some of the greenfield site is used by a collection of sports clubs and there are a number of residential properties. The scheme has failed to come forward for development due to issues relating to land assembly and funding required for a new junction of the A127 into the site. Any employment development at the site would need to either resolve the issue of funding for the junction or would need to come forward in a form that does not generate the level of traffic that would require a new junction. Some of the site has been identified in the SHLAA as having potential for future development for residential use (SS0124).
- Terminus Drive, Pitsea (protected under BAS E2) is a greenfield site adjacent to Pitsea railway station and has not been brought forward for 3.5 hectares of B1 and B2 class development. The site is owned by the Homes and Communities Agency (HCA).
- Land North of Courtauld Road (protected under BAS E3) has not been brought forward for 1.5ha of B1 use development. There are known viability issues with this site which stem from a stipulation by the Highways Authority that the site is not accessible from

Courtauld Road and access must be taken through the Rose Garden Centre via Nevendon Road if it was to be developed. If this constraint was to remain, the site is likely to be more suitable for a non-commercial use, as HGV access on this part of Nevendon Road is unsuitable. The site is owned by the HCA.

- Land at the Ford Research and Development Centre (protected under BAS E5) has been accounted for in the site appraisal analysis (as Site 11 Ford Technical Centre) in chapter 6 along with its future B-class development potential.
- Harvey Road and Archers Field (protected under BAS E6) permitted the expansion of untidy industry. Untidy industry encompasses a variety of industries which are not only untidy in appearance, but which also have the potential to cause significant environmental harm. The site is accounted in the site appraisal analysis (as Site 3 Burnt Mills) in chapter 6 along with its future B-class development potential.

5.27. Of the key employment sites, Terminus Drive Pitsea (protected under BAS E2) could be brought forward for new B-class development, with the provision of around 3.5 hectares of B1/B2. Gardiners Lane South (protected under BAS E1) could also provide potential for new B-class development (as part of a mix of uses) with the provision of around 16.2 hectares, but that this would be subject to the identified constraints being overcome,

5.28. The other two sites that still have potential B-class development opportunities are Harvey Road Field and Land at the Ford Research and Development Centre that are discussed in more detail in chapter 6.

Town centres

5.29. Basildon and Wickford are key town centres in the Borough and have been earmarked for significant potential for new B-class commercial development.

- An approved masterplan exists for Wickford town centre with aspirations for securing investment for 650 new jobs and 1,000 square metres of mixed commercial development.
- An approved regenerative masterplan exists for Basildon town centre supports 25,000 sq.m of office (B1a use class) commercial development as part of a mixed use regenerative strategy.

5.30. An approved masterplan also exists for Pitsea town centre, which focuses on increasing non-B use class commercial leisure uses, specifically related to increasing Pitsea's food and drink offer.

Key Messages

5.31. Basildon Borough has over 1,355,649 sq.m of B-class use employment floorspace, of which the majority is B1c/B2 with around a 38% share of the total stock. Around 89% of the existing occupied B-class floorspace is located within 24 employment areas (including the three main town centres of Basildon, Billericay and Wickford), which have been subject to site assessment appraisal in chapter 6. The remaining 11% is located outside of the existing employment areas.

5.32. The level of vacancy in the Borough is around 12%, with the highest concentration in B1a and B8 uses. The largest concentration of vacant floorspace is located in Site 4 – Cranes Industrial Estate, which was highest across all B-class employment uses. Basildon town centre also had a notably high concentration of vacant office floorspace (B1a) at some 11,597 sq.m.

5.33. The Borough has a number of potential sources that could bring forward new employment floorspace, as follows:

- **Vacant Floorspace (EGI data)** - This is approximately 167,845 sq.m of actively marketed B-class employment space. This presents a source of supply, for the market to function efficiently. There will always need to be flexibility and a range of choice in premises to allow for movement of business and to allow business to expand or start up. This current supply provides a vacancy level of around 12% which is considered to be an acceptable level of vacancy level for the Borough.

- **Commercial Development Pipeline** - The AMR identifies that there are valid but as yet unimplemented B use class planning permissions, which would result in a total net gain of 7,050 sq.m of B-class floorspace
- **Town centres** - have been earmarked for significant potential for new B-class development. This includes around 1,000 sq.m of mixed commercial in Wickford town centre and around 25,000 sq.m of office development in Basildon town centre.
- **Key Employment Sites** (Saved Policies in the Local Plan) - Gardiners Lane South (protected under BAS E1) provide potential for new B-class development (as part of a mix of uses) with the provision of around 16.2 hectares. Terminus Drive Pitsea (protected under BAS E2) could be brought forward for new B-class development, with the provision of around 3.5 hectares of B1/B2). The other two sites that still have potential B-class development opportunities are Harvey Road Field and Land at the Ford Research and Development Centre that are discussed in more detail in chapter 6.

5.34. Another potential supply of B-class development could come from the development of vacant/underutilised land identified within the existing employment areas, which is identified in more detail in chapter 6.

6. Site Assessment of Existing Employment Sites

Introduction

6.1. This chapter provides an overview of the 24 employment sites (including three primary town centres - Basildon, Billericay and Wickford) that have been considered as part of the assessment. The sites reviewed are for the most part employment allocations identified in the Saved Policies in the Basildon District Local Plan (1998). A detailed site-by-site breakdown of the appraisal findings can be found in Appendix D and Appendix E.

Site Appraisal Methodology

6.2. Basildon Borough Council Planning Officers identified the employment areas to be considered for review. Three of the existing employment sites were excluded from the site appraisal process, including Basildon University Hospital, Vange Farm and Barleylands. These sites were excluded from the site assessment process as they did not contain any B-class uses when verified during site visits.

6.3. Data from the VOA on B-class floorspace was used to indicate the location of clusters of businesses with a significant proportion of employment floorspace. This has verified that all of the major clusters of B-class employment uses are located in the 24 employment sites (including the three major town centres of Basildon Billericay and Wickford).[18] These sites were considered as part of an overview assessment, which focused on the existing quality of B-class premises and level of vacancy, along with potential redevelopment opportunities.

6.4. Comprehensive site appraisals were undertaken at each site assessing the following attributes:

- Site specific policy context;
- Location and site type;
- Total number of premises, number of vacant premises and vacant floorspace;
- The site typology including the balance and type of premises at each site;
- The condition of premises and percentage of premises developed within the last five years;
- Appraisal of access and transport issues including external and internal access and parking arrangements;
- Environmental condition and quality including the provision of amenities; and
- Other issues affecting the marketing and management of the site.

6.5. In order to ensure a consistent and robust assessment of the 24 sites (including three main town centres) considered, a site appraisal pro-forma was developed. Adopting this approach has enabled a mixture of qualitative and quantitative data to be collated. The Local Plan boundaries were mapped and verified as part of the site survey work.

6.6. To ensure a reliable and consistent approach to data collection, pro-forma guidelines were prepared which established how each question should be completed. Copies of the site pro-forma and pro-forma guidelines can be found in Appendix A. Site surveys were undertaken during December 2012 by a team of town planners. For reference purposes a photograph was taken at each employment site.

6.7. A detailed site-by-site breakdown of the appraisal findings can be found in Appendices D and E. Maps of each site in Appendix G include: site boundary; vacant land; vacant premises; and areas assessed to have the potential to provide scope for change through intensification, expansion, regeneration of employment premises, or alternative uses.

[18] Identified by Basildon Borough Council Planning officers

Site Analysis Overview

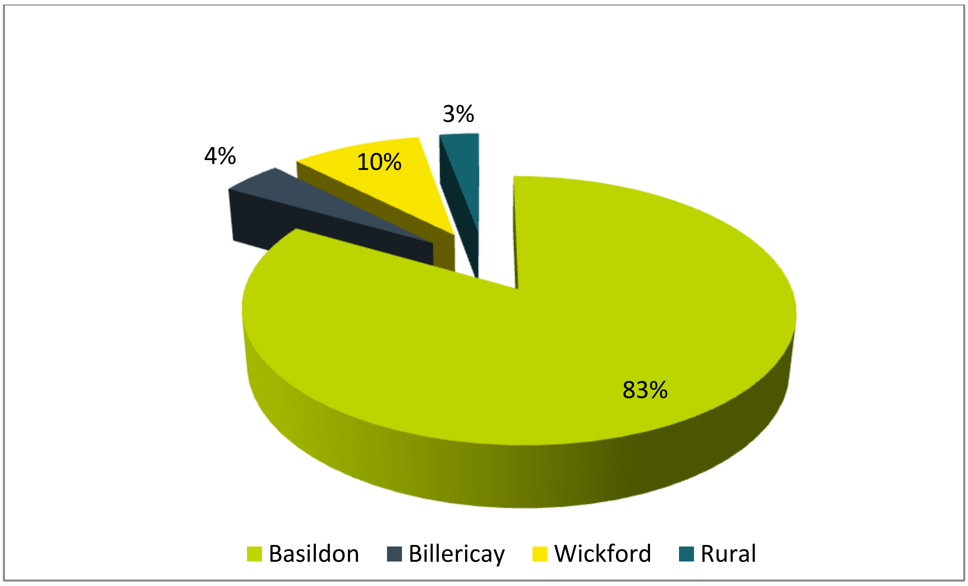
Location of Premises

6.8. The site appraisal summary of the sites is set out below under four sub-area typologies, which include:

- Basildon Sub Area – sites located within the urban area of Basildon
- Billericay Sub Area – sites located within the urban area of Billericay
- Wickford Sub Area – sites located within the urban area of Wickford
- Rural Sub Area – sites in a rural location outside of the settlement boundary

6.9. Basildon sub area has the largest concentration of sites with 11 existing employment sites and quantity of B-class employment land with an 83% share of the total in Basildon Borough.

Figure 7. Distribution of Employment Land Area by Sub-area[19]



Source: Atkins

Premises by Type

6.10. It is important to understand the nature of the local property market in terms of location and market segment. In order to understand the market areas in Basildon Borough each of the sites has been classified within a site typology based on the characteristics of the site from a market perspective. The classification of employment property segments was carried out by consultants during the site visit with the system being consistent with advice in the Employment Land Reviews Guidance Note (2004).

6.11. Table 9 summarises the quantity of employment land used for each of the eight premises types within each sub-area.

6.12. In terms of coverage in Basildon Borough as a whole, General Industrial Areas takes up the largest amount of land (129.8ha), followed by Warehouse / Distribution Parks and Sites for Specific Occupiers with some 106.5ha and 102.1ha, respectively.

[19] Excludes underutilised/vacant land

Table 9. Employment Land by Premises Type

Type of Premises	Basildon		Wickford		Billericay		Rural		Total	
	(ha)	(%)	(ha)	(%)	(ha)	(%)	(ha)	(%)	(ha)	(%)
Established Office Locations	67.6	15%	1.9	7%	3.8	7%	0.1	1%	73.4	13%
High Quality Business Park	0.0	0%	0.7	3%	0.0	0%	0.0	0%	0.7	0%
Warehouse / Distribution Park	90.9	20%	1.4	5%	8.9	16%	5.3	42%	106.5	19%
General Industrial Areas	97.3	21%	9.6	37%	17.8	32%	5.0	39%	129.8	24%
Incubator / SME Cluster Sites	21.7	5%	0.0	0%	5.4	10%	0.0	0%	27.1	5%
Sites for Specific Occupiers	102.1	22%	0.0	0%	0.0	0%	0.0	0%	102.1	19%
Recycling / Environmental Industrial Sites	11.7	3%	0.0	0%	0.0	0%	0.7	6%	12.4	2%
Retail	64.7	14%	12.2	47%	19.8	36%	0.5	4%	97.2	18%
Farm Based Employment Locations	0.0	0%	0.0	0%	0.0	0%	1.1	9%	1.1	0%
Total	**456.0**	**100%**	**25.8**	**100%**	**55.7**	**100%**	**12.7**	**100%**	**550.2**	**100%**

Source: Atkins. Percentages rounded (therefore totals may not sum 100%)

Development Opportunities and Constraints

6.13. The site audit identified whether the existing operations on employment sites were incompatible with sensitive neighbouring land uses. It also considered the potential of sites to support 24 hour working (without detriment to residential amenity). The sites with 24 hour working potential are well screened from neighbouring uses, particularly residential areas. The site audit also identified whether the introduction of non B-class floorspace could compromise the effective operation of the site.

6.14. Table 10 identifies the development opportunities and constraints on each site by sub-area and the amount of land potentially affected (identified in further detail in Appendix D and E).

Table 10. Employment Land by Site Constraints and Opportunities

Sub Area	Potential to Support 24 hour working		Introduction of non-B-class Uses May Compromise the Effective Operation of the Site		Existing Operations Incompatible with Sensitive Neighbouring Land Uses		Floodplain Constraints	
	(No.)	(%)	(No.)	(%)	(No.)	(%)	(No.)	(%)
Basildon	9	64%	10	77%	0	0%	1	17%
Wickford	0	0%	1	8%	0	0%	0	0%
Billericay	0	0%	1	8%	0	0%	2	33%
Rural	5	36%	1	8%	2	100%	3	50%
Total	**14**	**100%**	**13**	**100%**	**2**	**100%**	**6**	**100%**

Source: Atkins. Percentages rounded (therefore totals may not sum 100%)

6.15. Overall there are a total of two sites that have existing operations that are incompatible with sensitive neighbouring land uses. These are Site 17 – Vange Wharf and Site 18 Pitsea Hall, which are in close proximity to environmentally sensitive areas (SSSI/LoWS). Furthermore, 14 sites have the potential for 24 hour working (potential for 24 hour working is an opportunity but it must not be to the detriment of neighbouring uses) and 12 sites could be affected by the introduction of non B-class floorspace on site.

6.16. Several sites had identified development constraints that could impact on the future development of the site. Site 17 Vange Wharf and Site 18 are located adjacent to SSSI and Local Wildlife Sites (LoWS) that would impact on any plans for expansion, Site 20 is also located close to (but not adjacent) an SSSI and LoWs. The land previously occupied by the Burnt Mills LoWS is in the process of being prepared for development following the relocation of the Washland north of the A127 and the rerouting of a watercourse, which had previously consisted of the majority of the site. Planning consent was granted in December 2012 for a Strategic Waste Management Facility by the Waste Planning Authority, Essex County Council. Construction is due to start in early 2013.[20] In addition, a number of sites are located adjacent to large residential areas, including Site 1 Wickford Business Park, Site 10 Wrexham Road (also constrained by a railway line), Site 9 Laindon North and Site 2 Radford Way.

Age of Building Stock

6.17. The proportion of premises developed in the last five years was identified during the site assessments as this indicates whether sites have been subject to recent new development. It was identified that no sites had been developed in the last five years. There are various industrial estates in Basildon with premises that were built in the 1950s as part of the first phases of the New Town; however no particular issues with the condition and occupancy of these premises were noted. When considering the likely need for refurbishment or new build, the condition of premises is an important factor, condition of premises is discussed below.

Condition of Sites

6.18. Table 11 summarises the findings of the condition assessment by sub area. The majority (52%) of sites within the Borough are good quality. Overall only 3% of sites were considered to be poor.

6.19. The Basildon sub-area has the greatest proportion (58%) of sites that are assessed as good and Billericay has the highest proportion that are assessed as fair (95%). The greatest proportion (54%) of sites that are assessed as poor are located in the rural sub-area.

6.20. The poor quality sites include office accommodation within Basildon and Wickford town centres that is considered fair-poor quality; warehousing accommodation in Site 17 Vange Wharf, general industrial accommodation in Site 14 Guildprime, Site 15 White Bridge Farm, Site 18 Pitsea Hall Lane, Site 19 Sadlers Farm and Site 22 London Road (Vange).

Table 11. Employment Land by Condition of Site

Sub Area	Total Area	Good		Fair		Poor	
	(ha)	(ha)	(%)	(ha)	(%)	(ha)	(%)
Basildon	456.0	266.9	59%	181.8	40%	7.2	2%
Wickford	55.7	10.7	19%	45.0	81%	0	0%
Billericay	25.8	1.4	5%	24.4	95%	0	0%
Rural	12.7	0.3	2%	5.5	43%	6.9	54%
Total	**550.2**	**279.3**	**51%**	**256.7**	**47%**	**14.1**	**3%**

Source: Atkins. Percentages rounded (therefore totals may not sum 100%)

Public Transport

6.21. The proportion of premises with access to public transport was identified for each site by identifying the proximity of the site to a bus stop or a railway station.

[20] Essex County Council, Courtauld Road, January 2013 http://www.essex.gov.uk/Environment%20Planning/Recycling-Waste/Waste-Strategy/Pages/Courtauld-Road-Basildon.aspx

6.22. The town centres of Basildon, Wickford and Billericay have good transport links. All three have mainline railway stations that provide connections to London.

6.23. Many of the employment sites do not have access to the railway network, but still have access to public transport via the Borough's bus network. The rural sub-area sites have generally worse access to public transport as might be expected with 44% of sites with access further than 500 metres to the bus network, in comparison to 9% of sites in the Basildon sub-area and no sites in the Wickford and Billericay sub areas.

Table 12. Site Proximity to Public Transport

Proximity to Public Transport		Basildon		Wickford		Billericay		Rural	
		Sites (No.)	(%) Total in sub area	Sites (No.)	(%) Total in sub area	Sites (No.)	(%) Total in sub area	Sites (No.)	(%) Total in sub area
Bus	Within 100m	10	91%	2	100%	2	100%	4	44%
	Within 400m	0	0%	0	0%	0	0%	1	11%
	Within 800m	0	0%	0	0%	0	0%	0	0%
	Further than 800m	1	9%	0	0%	0	0%	4	44%

Source: Atkins. Percentages rounded (therefore totals may not sum 100%)

Car Parking and Access

6.24. The proportion of premises with access to car parking facilities was assessed for each site by identifying the types of parking available.

6.25. Car parking is generally not an issue for the sites. Site 16 London Road Clusters had some evidence of parking difficulties as vehicles were parked on street, which was considered to be unsafe. The remaining sites all had on-site parking, apart from the majority of businesses located within the three main town centres, particularly Basildon that have to rely on paid car-parking due to a lack of free/dedicated car parking for office buildings.

6.26. All of the sites had good site access and were well served by the roads. Access was constrained for Site 22 London Road (Vange) where access was along a narrow lane with a level crossing access. Site 18 Pitsea Hall Lane is affected by a weak bridge (which means only one HGV can pass over it at a time in either direction), along with a level crossing.

Basildon Sub Area

Site 13a Basildon town centre

Location

6.27. Basildon town centre covers around 71.9 hectares and benefits from a main line railway station, with frequent services to South Essex towns, London Fenchurch Street and a central bus depot. The town centre accommodates a variety of retailers in the Town Square, East Walk, Eastgate Shopping Centre and Westgate shopping park. Basildon also has good strategic road transport links via the A127 and A13. Basildon town centre is surrounded by housing on all sides.

Site Appraisal

6.28. There are some 104 existing B-class employment premises. 23 of the premises are currently vacant, which equates to a premises vacancy rate of 22%. According to EGI data there is some

11,597sq.m of vacant office (B1a) floorspace, this is a floorspace vacancy rate of 37%. Some of the prominent vacant office buildings include:

- Southernhay House a prominent ten storey office building situated in the heart of Basildon town centre. The building is located on Southernhay and has approximately 6,237 sq.m of office vacancy. The 10 storey CGNU House (built 1985) on Southernhay has planning permission to be partially demolished (removal of floors from the 2nd to 9th floors and integration of the remaining office space into the Eastgate Shopping Centre as retail space). It has been vacant since 2008. Surveys have showed that whilst the structure of the building is sound, the accommodation is dated and does not meet the needs of modern office occupiers. This will see the loss of one B-class employment premise (approx 8,100sqm of gross floorspace) that would change the overall vacancy rate change to 31%.
- Acorn House a five storey 1980s office building located on Great Oaks. The building has approximately 985 sq.m of available office accommodation.

6.29. There are instances where some of the office buildings have received planning permission for conversion to residential development.

- Northgate House located in the centre of Basildon and fronts onto the Town Square. The building has planning permission (granted in 2008) for conversion and new build to create 99 flats. The 1960s office building has been stripped of all fixtures, fittings and services and has been left in a shell state. The existing square footage is approximately 3,577 sq.m over three floors. Whilst the Northgate House scheme is relevant in the office to housing conversion, Northgate House is unlikely to proceed and its permission has since lapsed.
- Trafford House (23,416 sq m gross) received planning consent in June 2011 for conversion into 359 units.

6.30. The recent changes to the ‘permitted development rights’ (PDR) that allow change of use from office to residential without the need for planning consent may have an impact on Basildon Borough. Where the conversion will require external modification of the building planning permission would still be required.

6.31. Offices premises that are at particular risk of conversion are likely to be premises that are located above retail uses within town centres, as these premises tend to be easier to convert without the need for external modification. This is likely to have a greater impact on Wickford and Billericay that are locations with less demand for offices.

6.32. It should be noted that PDR changes will be limited to an initial three-year period, although the Government may choose to extend this. As such only offices that are currently vacant or those that become vacant in the next three years will be vulnerable to conversion.

Opportunities for Change

6.33. As noted in chapter 2, an approved regenerative masterplan exists for Basildon town centre supports 25,000 sq.m of office (B1 use class) commercial development as part of a mixed use regenerative strategy should there be market demand. The masterplan is now an Interim Supplementary Planning Document (SPD), will form part of the Local Plan and inform future planning applications in the town centre.

Recommendations

6.34. The existing town centre should continue to support B-class employment uses.

Site 3 Burnt Mills

Location

6.35. The Burnt Mills Industrial Estate covers around 85.3 hectares and is bounded to the north by Courtauld Road and Burnt Mills Road to the South. The site forms a self-contained industrial area that accommodates offices, light industrial and storage and distribution uses. To the north of

Courtauld Road is the Basildon Sewage Treatment Works and to the east is a separate smaller self-contained industrial estate on Hovefields Avenue. To the north of the Basildon Sewage Treatment Works is the PMS International Group PLC distribution centre and the Lords Court Business Park.

6.36. Adjacent to the north of the site is LoWS (Burnt Mills) and to the east of this is a gypsy & traveller site. The site is bounded to the north and east by greenfield land (currently located within the Green Belt) and to the west by Site 4 Cranes Industrial Estate and to the south by Felmores residential areas.

6.37. Burnt Mills is where development typically classed as being of a more untidy nature (scrap yards, open yards, waste management, etc) have generally been located in the past.

Site Appraisal

6.38. There are some 305 existing B-class employment premises. 40 premises are currently vacant, which equates to a premises vacancy of 13%. According to EGI data there is some 26,728sq.m of vacant B-class floorspace, this is a floorspace vacancy rate of 24%, of which 68% supports mixed industrial uses (B1/2/8).

6.39. The site has good connections to the strategic road network with immediate access to the A132. The site has a good quality and image and provides for a mix of uses including, light industrial and storage and distribution uses in fair quality premises. The site also accommodates the Basildon Sewage Treatment Works.

Figure 8. Veoila Environmental Services, Burnt Mills

Opportunities for Change

6.40. There are six parcels of land with a combined total of 3.3ha that could be utilised for new B-class development. Each parcel of vacant/underutilised land is recorded in Appendix G.

- No.3 – 0.8ha parcel of land (currently allocated for proposed employment)
- No.4 - 0.8ha parcel of land (currently allocated for proposed employment)
- No.5 – 0.2ha parcel of land (currently allocated for proposed employment)
- No.6 – 0.2ha parcel of land (partly allocated for proposed employment)

- No.7 – 1.3ha parcel of land (currently allocated for proposed employment)[21]
- No.8 – 3.8ha parcel of land (currently unallocated)

Recommendations

6.41. The existing allocation boundary should be amended to include the former Tree Nursery (No.8) vacant parcel between residential area and Lords Way. The boundary should also be amended to include the Lords Court Business Park (see Map page 3 Appendix G). The Sewage Treatment Works and Waste Allocation should also be removed from the designation as these are classified as non B-class uses. The Untidy Industrial area should continue to be protected (Policy BAS E6).

6.42. The Proposed Employment Area E3 should not be incorporated within the employment area as there are known viability issues that stem from a stipulation by the Highways Authority that the site is not accessible from Courtauld Road and access must be taken through the Rose Garden Centre via Nevendon Road if it was to be developed. If this constraint was to remain, the site is likely to be more suitable for a non-commercial use, as HGV access on this part of Nevendon Road is unsuitable.

6.43. The existing employment sites should continue to be protected for B-class employment uses.

Site 4 Cranes Industrial Estate

Location

The Cranes Industrial Estate covers around 80.2ha and is bounded to the north by A127 and to the south by Cranes Farm Road (A1235). The site forms a self-contained industrial area that accommodates offices, light industrial, storage and distribution uses.

To the east of the site is Site 3 Burnt Mills and to the west is a collection of sports grounds and residential properties at Gardiners Lane South, to the north is greenfield land (currently located within the Green Belt) and to the south is the Fryerns residential areas.

Site Appraisal

6.44. There are some 429 existing B-class employment premises, 43 premises are currently vacant, which equates to a premises vacancy rate of 10%. According to EGI data there is some 44,197sq.m, this is a floorspace vacancy rate of 28%, of which 82% supports mixed industrial uses (B1/2/8).

6.45. The site has good connections to the strategic road network via Cranes Farm Road (A1235). The site has a good quality and image and provides for a mix of uses including offices, light industrial, storage and distribution uses on fair quality premises. There is also a local centre located at the intersection of Paycocke Road and Honywood Road.

[21] This site is located within a Major Hazard Zone due to its close proximity to the Gas Holder in Archers Field in Site 3 Burnt Mills. This could constrain the future development of this site.

Figure 9. Pembroke Business Centre, Cranes Industrial Estate

Opportunities for Change

6.46. There are three parcels of land with a combined total of 13.5ha that could be utilised for new B-class development:

- No.9 – 6.4ha parcel of land (currently unallocated)
- No.10 – 4.0ha parcel of land (currently allocated)
- No. 11 – 3.1ha parcel of land (currently allocated)

Recommendations

6.47. The site boundary should be extended to the A127 to include the strip of greenfield land (allocated as existing open space) covering 6.4ha. The existing employment site should continue to be protected for B-class employment uses (see Map page 4 Appendix G).

Site 5 Case New Holland Tractor Park

Location

6.48. The Case New Holland Tractor Park covers some 39.7ha and is a single occupier site, whose activities involve the manufacturing of tractors. The site is bounded to the north by Endeavour Drive and to the south by Cranes Farm Road (A1235).

6.49. To the north and west of the site is Site 6 Festival Business Park and to the east is a collection of sports grounds and residential properties at Gardiners Lane South. To the south of the site is existing open space and school playing fields.

Site Appraisal

6.50. There is one existing B-class employment premise which is currently occupied.

6.51. The site has good connections to the strategic road network via Cranes Farm Road (A1235). The site has a good quality and image and supports light industrial activities in good quality premises.

Figure 10. Case New Holland Tractor Park

Opportunities for Change

6.52. The site is fully developed and fully occupied and there are no identified opportunities for change.

Recommendations

6.53. The existing employment site should continue to be protected for B-class employment uses (see Map 5 page Appendix G).

Site 6 Festival Business Park

Location

6.54. The Festival Business Park covers some 21.2ha and supports a mix of offices, light industrial, general industrial, storage and distribution uses. The site is bounded to the north by the A127 and to the south by Cranes Farm Road (A1235).

6.55. To the east of the site is Site 5 Case New Holland Tractor Park, to the north is greenfield land (currently allocated as Green Belt land), to the south is open space and school playing fields and to the west is the Aquatels Fishing Lake and Festival Leisure Park.

Site Appraisal

6.56. There are 38 existing B-class employment premises, 5 premises are currently vacant, which equates to a premises vacancy rate of 13%. According to EGI data there is some 4,395sq.m of mixed industrial floorspace (B1/2/8), this is a floorspace vacancy rate of 21%.

6.57. The site has a good quality and image and provides for a mix of uses including offices, light industrial, general industrial and storage and distribution uses in good quality premises.

Figure 11. Carnival Park, Festival Business Park

Opportunities for Change

6.58. There are two parcels of land with a combined total of 4.3ha that could be utilised for new B-class development:

- No.12 - 2.4ha parcel of land (currently unallocated)
- No.13 - 1.9ha parcel of land (currently unallocated)

6.59. Parcel No.14 is not available. It is functional floodplain known locally and by the Environment Agency as Turners Chase Washland. It has already been scaled down in size to build the surrounding employment uses

Recommendations

6.60. The site boundary should be amended to exclude the Festival Leisure Park that accommodates leisure and entertainment uses and the David Lloyd complex. The existing employment site should continue to be protected for B-class employment uses (see Map page 6 Appendix G).

Site 7 Pipps Hill

Location

6.61. Pipps Hill Industrial Area covers some 59.9ha and is bounded to the north by A127 and to the south by Cranes Farm Road (A1235). The site supports a mix of offices, light industrial, general industrial and storage and distribution uses.

6.62. To the east of the site is Aquatels Fishing Lake, to the south is Gloucester Park, to the north is a LoWS and to the west is Site 8 IFDS.

Site Appraisal

6.63. There are some 234 existing B-class employment premises, 30 premises are currently vacant, which equates to a premises vacancy rate of 13%. According to EGI data there is some 12,921 sq.m of B-class floorspace, this is a floorspace vacancy rate of 20%, of which 64% is mixed industrial floorspace (B1/2/8).

6.64. The site contains a mixture of both old mixed industrial premises and more modern general industrial and warehousing. The site has a good quality and image and provides for a mix of uses including offices, light industrial, general industrial and storage and distribution uses in fair-good quality premises.

6.65. There are a number of non-B class uses, including car showroom, restaurant (Grand Central), car wash facility and play centre (Playutopia) that are primarily focused along Miles Gray Road. Such retail development impacts on the existing employment area by reducing the size of existing employment clusters that are important for attracting new occupiers.

Figure 12. Pipps Hill

Opportunities for Change

6.66. There is a strip of greenfield land (currently allocated as existing open space) covering some 6.4ha to the north of the site that could be developed for additional B-class uses as an expansion to the existing industrial estate.

Recommendations

6.67. The employment site boundary should be amended to exclude the Pipps Hill Retail Park that is located to the east of the A176. The site boundary should be extended to the A127 to include the strip of greenfield land. The existing employment site should continue to be protected for B-class employment uses (see map page 7 Appendix G).

Site 9 Laindon North

Location

6.68. The site covers some 9.1ha and is bounded to the north by A127 and to the east by High Road (Laindon). The site supports a mix of offices, light industrial, general industrial and storage and distribution uses.

6.69. To the north and south of the site is residential housing; to the west is open land (that is owned as part of Site 11 Ford Technical Centre) part of which was granted planning in permission in 2013 for a new residential neighbourhood. To the east of the site is open space and residential housing.

Site Appraisal

6.70. There are some 76 existing B-class employment premises, 11 premises are currently vacant, which equates to a premises vacancy rate of 14%. According to EGI data there is some 5,634sq.m, this is a floorspace vacancy rate of 28%, of which 99% supports mixed industrial uses (B1/2/8).

6.71. The site has a good quality and image and provides for a mix of uses including offices, light industrial, general industrial and storage and distribution uses in fair-good quality premises.

Figure 13. Laindon North Trading Estate

Opportunities for Change

6.72. The site is fully developed and there are no identified opportunities for change.

Recommendations

6.73. The site boundary should be amended to exclude the BP Petrol Filling Station on the A127/High Road junction. The southern boundary should be extended to include all of the B-class premises as opposed to just the part of the buildings (see Map page 9 Appendix G).

6.74. The existing employment site should continue to be protected for B-class employment uses.

Site 10 Wrexham Road

Location

6.75. The site covers some 4.5ha and supports offices and light industrial uses. The site is bounded to the east by High Road (Laindon) and to the south by railway line. Residential housing surrounds the site on the north, east and west perimeter.

Site Appraisal

6.76. There are some 51 existing B-class employment premises. There is currently one vacant unit, which equates to a premises vacancy rate of only 2%. According to EGI data there is some 90sq.m of office (B1a) floorspace that is vacant this is a floorspace vacancy rate of 1%.

6.77. The site has a good quality and image and provides for a mix of uses including offices, and light industrial uses in fair quality premises.

Figure 14. Francis House, Wrexham Road

Opportunities for Change

6.78. The site is fully developed and there are no identified opportunities for change.

Recommendations

6.79. The existing employment site should continue to be protected for B-class employment uses. (See Map 10 page Appendix G).

Site 11 Ford Technical Centre

Location

6.80. The Dunton Technical Centre covers some 78.4ha and is a major automotive research and development facility. The site is bounded to the north by the A127 and to the east by the B148.

6.81. To the north and east is Greenfield land (currently allocated as Green Belt), to the south is Site 12 Southfields and to the east is Site 9 Laindon North.

Site Appraisal

6.82. There is one existing B-class employment premises, which is currently occupied.

6.83. The site has good connections to the strategic road network via A127. The site has a good quality and image and supports automotive research and development activities in good quality premises.

Opportunities for Change

6.84. There are three parcels of land with a combined total of 16.1ha that could be utilised for new B-class development:

- No.16 – 13.2ha parcel of land (currently allocated as Ford Research and Development Area)
- No.17 - 1.4ha parcel of land (currently allocated as Ford Research and Development Area)
- No.18 - 1.5ha parcel of land (currently allocated as Ford Research and Development Area)

Recommendations

6.85. The boundary to the east needs to be amended as it has been granted consent (subject to s.106) for housing (see application for boundaries ref 12/00951/FULL). On the western site boundary the car showroom should be excluded as this is a non B-class use. The existing employment site should continue to be protected for B-class employment uses (see Map page 11 Appendix G).

6.86. Subject to the Council investigating Ford's land requirements and aspirations for the land, Sites 14, 15 and 16 should be protected for B class development and not under the current restrictive automotive research and development designation (Policy BAS E5). The Dunton Technical Centre should continue to be protected under Policy BAS E5.

Site 12 Southfields

Location

6.87. The site covers some 40.5ha and supports a mix of offices, light industrial, general industrial and storage and distribution uses. The site is bounded to the east and south by the B1036.

6.88. To the west is greenfield land (currently allocated as Green Belt land), to the south by residential area of Laindon West, to the north by Site 11 Ford Technical Centre and functional floodplain and to the east by Victoria Park.

Site Appraisal

6.89. There are some 249 existing B-class employment premises, 34 premises are currently vacant, which equates to a premises vacancy rate of 14%. According to EGI data there is some 30,576sq.m, this is a floorspace vacancy rate of 28%, of which 76% supports mixed industrial uses (B1/2/8).

6.90. The site has a good quality and image and provides for a mix of uses including offices, light industrial, general industrial and storage and distribution uses in good quality premises.

Figure 15. Seax Court, Southfields

Opportunities for Change

6.91. The site is fully developed and there are no identified opportunities for change.

Recommendations

6.92. The car showroom in the south-west corner of site boundary (and to the north of the B148) should be excluded as it is a non-B-class uses. The existing employment site should continue to be protected for B-class employment uses (see Map page 12 Appendix G).

Site 8 International Financial Data Services

Location

6.93. The site covers some 5.2ha and provides the location for the UK headquarters of the International Financial Data Services (IFDS). The site is bounded to the east of A176 and to the south by the B148.

Site Appraisal

6.94. There is one existing B-class employment premises, which is currently occupied. IFDS House was designed as a high specification, landmark office building, which was awarded the BREEAM Excellent rating for its use of mixed mode cooling systems and energy efficiency that reduce its environmental impact.

6.95. The site has good connections to the strategic transport network via A176. The site has a good quality and image and supports office activities in good quality premises.

Figure 16. International Financial Data Services

Opportunities for Change

6.96. When the site was granted planning permission, there was the option that a phase 2 might come forward and the building was designed to be able to accommodate an extension to the west of the site. This small land parcel is currently landscaped and any further development would rely on the landowner bringing this forward. The site is fully occupied (IFDS) and there are no further identified opportunities for change.

Recommendations

6.97. The existing employment site should continue to be protected for B-class employment uses.

Billericay Sub Area

Site 13b Billericay Town Centre

Location

6.98. Billericay is a popular historic commuter town with a wide array of shops, banking facilities and pubs/restaurants that cover around 71.9ha. Billericay rail station is at the north end of the High Street and provides a regular service direct to London Liverpool Street and Crossrail connections from the Shenfield terminus in neighbouring Brentwood from 2018. Billericay has good strategic transport connections to the A127. To the south, east and west of the site is residential housing and to the north is the railway line.

Site Appraisal

6.99. There are some 147 existing B-class employment premises.15 premises are currently vacant, which equates to a premises vacancy rate of 10%. According to EGI data there is some 2,648sq.m, this is a floorspace vacancy rate of 5%, of which 97% supports mixed industrial uses (B1/2/8).

6.100. There is around 2,648 sq.m of vacant office space within Billericay town centre. Office accommodation is typically located above ground floor retail along the main high street.

Opportunities for Change

6.101. The town centre is fully developed and there are no identified opportunities for change unless redevelopment schemes of existing premises come forward.

Recommendations

6.102. The existing town centre should continue to support B-class employment uses.

Site 2 Radford Way

Location

6.103. The site covers some 14.1ha and supports a mix of offices, light industrial, general industrial and storage and distribution uses. The site is bounded to the east by the B1007 and south by a railway line. To the east and west of the site is residential housing and to the north is open space.

Site Appraisal

6.104. There are some 82 existing employment premises, 13 premises are currently vacant, which equates to a premises vacancy rate of 16%. According to EGI data there is some 5,116sq.m, this is a floorspace vacancy rate of 20%, of which 56% supports office uses (B1a) and 44% supports mixed industrial uses (B1/2/8).

6.105. The site has a good quality and image and provides for a mix of uses including offices, light industrial, general industrial and storage and distribution uses in good quality premises.

Figure 17. Lake Meadows Business Park, Radford Way

Opportunities for Change

6.106. Opportunity No. 2 is a surface car park on Radford Crescent and presents an opportunity for development for potential B-class uses; if a business case could be put forward, the Council as landowner could determine to release this for employment development.

Recommendations

6.107. The boundary should be amended to include the surface car park. The existing employment site should continue to be protected for B-class employment uses (see Map page 2 Appendix G).

Wickford Sub Area

Site 13c Wickford Town Centre

Location

6.108. Wickford is a small commuter town with a range of retail and community facilities that covers some 20ha. Wickford has good transport links with a mainline rail service to London Liverpool Street. The town centre also has good bus connections to surrounding areas. The A127 Southend Arterial Road offers expedient access to the M25 and the A130 gives fast links to Chelmsford and the A12. The Wickford town centre boundary location is dissected by a railway line on a north-west and south-east axis. The town centre is surrounded by residential housing.

Site Appraisal

6.109. There are some 80 existing B-class employment, 7 premises are currently vacant, which equates to a premises vacancy rate of 9%. According to EGI data there is some 1,447sq.m of office (B1a) floorspace, this is a floorspace vacancy rate of 5%. Office accommodation is typically located above ground floor retail along The Broadway.

Opportunities for Change

6.110. There are no immediate opportunities for B class development in the town centre; however an approved masterplan exists for Wickford town centre with aspirations for securing investment for 650 new jobs and 1,000 square metres of mixed commercial development.

Recommendations

6.111. The existing town centre should continue to support B-class employment uses.

Site 1 Wickford Business Park

Location

6.112. The site covers some 36.1ha and is bounded to the south and east by a railway line. The site supports a mix of offices, light industrial, general industrial and storage and distribution uses.

6.113. To the east of the site is a reservoir that is within the Rochford District Boundary. To the south of the site is greenfield land (currently allocated as Green Belt) and residential housing. To the north and the west of the site is residential housing.

Site Appraisal

6.114. There are some 307 existing employment premises, 38 premises currently vacant, which equates to a premises vacancy rate of 12%. According to EGI data there is some 13,999sq.m, this is a floorspace vacancy rate of 18%, of which 87% supports mixed industrial uses (B1/2/8).

Figure 18. Brocks Business Park

Opportunities for Change

6.115. There is a vacant parcel of land (0.4ha) that could be utilised for new B-class development.

Recommendations

6.116. The existing employment site should continue to be protected for B-class employment uses (see Map page 1 Appendix G).

Rural Sub Area

6.117. The following sites are all located within the Green Belt. Underutilised/vacant land identified within these sites represent an opportunity, however as they are located within the Green Belt they are not included within the future supply of employment land but could be allocated through the local plan review process.

Site 14 Guildprime

Location

6.118. The site covers around 1.6ha and is located in a rural area close to Great Burstead and South Green and is bounded to the east by Southend Road (A129). The site accommodates the Guildprime Business Centre that supports a variety of offices, light industrial and storage and distribution uses. The site is located within the Green Belt.

6.119. The site is surrounded by greenfield land that is located within the Green Belt. To the north of the site there is also housing.

Site Appraisal

6.120. The Guildprime Business Centre is a self-contained site providing for a mixture of B-class offices, light industry and storage and distribution uses. The site has fair quality warehousing and poorer quality general industrial areas (that could be upgraded over time).

6.121. There are some 11 existing B-class employment premises, 2 premises are currently vacant, which equates to a premises vacancy rate of 18%. According to EGI data there is some 930sq.m, this is a floorspace vacancy rate of 36%, of which 91% supports office uses (B1a).

Figure 19. The Guildprime Business Centre

Opportunities for Change

6.122. The site is fully developed and there are no identified opportunities for change.

Recommendations

6.123. The existing employment site should be protected for B-class employment uses subject to changes to Green Belt policy (see Map page 16 Appendix G).

Site 15 White Bridge Farm

Location

6.124. The site covers some 2.7ha and is located in a rural area and is bounded to the south by Crays Hill (A129). The site accommodates the White Bridge Industrial Estate that supports a variety of offices, light industrial and storage and distribution uses. The site is located within the Green Belt.

6.125. The site is surrounded to the north, east and west by greenfield land (currently allocated as Green Belt land). To the south is recreational open space.

Site Appraisal

6.126. White Bridge Farm supports mainly light industry and storage and distribution uses. The site has fair quality warehousing and poor quality general industrial areas (that could be upgraded over time).

There are 2 existing employment premises with no premises currently vacant.

Opportunities for Change

6.127. There is a parcel of land (1.2ha) that could be utilised for new B-class use development, subject to changes to Green Belt policy.

Recommendations

The existing employment site should be protected for B-class employment uses (see Map page 17 Appendix G).

Site 16 London Road Clusters

Location

6.128. There is a concentration of B-class employment uses covering some 2.4ha that are clustered along London Road (A129), which is immediately to the west of Billericay. The sites are within the Green Belt.

6.129. To the north and south is greenfield land (currently allocated as Green Belt land). To the east and west is residential housing.

Site Appraisal

6.130. The clusters on the London road support mainly light industrial and storage and distribution uses. Generally the sites are of a fair quality, but some of the general industrial areas could be upgraded or redeveloped over time. The high concentration of employment activity along this road demonstrates the desirability of this location for employment uses. The site have a fair quality and image and provides for a mix of uses including light industrial and storage and distribution uses on fair quality premises.

6.131. There are some 18 existing B-class employment premises with no vacancies.

Figure 20. London Road Clusters

Opportunities for Change

6.132. The site is fully developed and there are no identified opportunities for change.

Recommendations

6.133. The existing employment site should be protected for B-class employment uses (see Map page 18 Appendix G).

Site 17 Vange Wharf

Location

6.134. The site covers 3.1ha and is in a rural area located to the south of the A13 and accommodates storage and distribution uses. The site is located within the Green Belt.

6.135. To the south, east and west of the site is SSSI/LoWS and to the north is open space and residential housing. In addition to the SSSI/LoWS, the neighbouring land is also part of the Tidal flood plain of the Thames Estuary and access is via a level crossing.

Figure 21. Vange Wharf

Site Appraisal

6.136. There are some 11 existing B-class employment premises, one premises is currently vacant, which equates to a premises vacancy rate of 9%. There is 2,473 sq.m of vacant floorspace, this is a floorspace vacancy rate of 61%.

6.137. The site is a self contained general industrial area and should be protected for employment uses. The quality of the existing units is fair so would not require redevelopment. The site should be protected for employment uses.

Opportunities for Change

6.138. The site is fully developed and there are no identified opportunities for change.

Recommendations

6.139. The existing employment site should continue to be protected for B-class employment uses (see Map page 19 Appendix G).

Site 18 Pitsea Hall Lane

Location

6.140. The site covers around 2ha and is in a rural area located to the south of the A13 and accommodates storage and distribution uses. The site is located within the Green Belt.

6.141. To the north is Pitsea Railway Station and land to the east, west and south is designated SSSI/LoWS. Access is via a weak bridge and level crossing.

Site Appraisal

6.142. There are some 11 existing employment premises with no vacant premises. The existing site supports general industrial uses that are ageing and of poor quality. The site is in close proximity to an environmentally sensitive location (SSSI/LoWS).

Opportunities for Change

6.143. The site is a contained general industrial area, however the units are in poor quality and may need to be redeveloped if they were to become vacant.

Recommendations

6.144. The existing employment site contains units that are in poor condition and are in need of redevelopment. However the site is not best suited to continued B-class employment use (see Map page 20 Appendix G).

Site 19 Sadlers Farm

Location

6.145. The site covers some 1.3ha and is located in a rural area accommodating light industrial uses. The site is bounded to the east by the A130 and to the south by the B1464. The site is located within the Green Belt.

6.146. The site is surrounded to the north, west and south by greenfield land (allocated within the Green Belt). There is residential housing to the east within the neighbouring local authority of Castle Point Borough.

Site Appraisal

6.147. There are some 28 existing employment premises with no vacant premises.

Figure 22. Sadlers Farm

Opportunities for Change

6.148. The site is a contained general industrial area; however the units are in poor quality and may need to be redeveloped if they were to become vacant. Also expansion of the site would require access improvements.

Recommendations

6.149. The existing employment site contains units that are in poor condition and are in need of redevelopment. However the site is not best suited to continued B-class employment use. There is a parcel of land (0.5ha) that could be utilised for new B-class use development, however access improvements would be necessary to develop this (see Map page 21 Appendix G).

Site 20 Blue House Farm

Location

6.150. The site covers some 1.1ha and is bounded to the south by the A13 and to the north by the B1464. The site accommodates offices and storage and distribution uses. The site is located within the Green Belt.

6.151. To the north and west of the site is residential housing, to the south and east is Greenfield land (allocated within the Green Belt).

Site Appraisal

6.152. There are 4 existing employment premises with no vacant premises.

Figure 23. Blue House Farm

Opportunities for Change

6.153. There is a vacant parcel of land (0.8ha) that could be utilised for new B-class use development.

Recommendations

6.154. The existing employment site should be protected for B-class employment uses (see Map page 22 Appendix G).

Site 21 Annwood Lodge

Location

6.155. The site covers some 2.5ha and is located in a rural area and is bounded to the south by A127 and to the north by the railway. The site supports a variety of offices, light industrial and storage and distribution uses. The site is located within the Green Belt.

6.156. To the north, east and south is greenfield land (allocated within the Green Belt). To the east is greenfield land that is located within the neighbouring local authority of Rochford District.

Site Appraisal

6.157. The site supports a variety of light industrial, storage and distribution and ancillary office uses and should be protected for employment uses.

6.158. The quality of the existing B class premises is fair with good access to the A127, so would not require redevelopment. There are some 14 existing employment premises with no vacant premises.

Opportunities for Change

6.159. There is a vacant parcel of land (1.9ha) that could be utilised for new B-class use development.

Recommendations

6.160. The existing employment site should be protected for B-class employment uses (see Map page 23 Appendix G).

Site 22 London Road, Vange

Location

6.161. The site covers some 0.4ha and is bounded to the west by the A176 and to the south by B1464. The site is located within the Green Belt.

6.162. To the north, east and south of the site is greenfield land (allocated within the Green Belt). To the west is the SSSI/LoWS.

Site Appraisal

6.163. There are some 11 existing employment premises with no vacant premises. The premises are of a poor quality and condition and have direct access to London Road (B1464).

Opportunities for Change

6.164. The site is a contained general industrial area; however the units are in poor quality and may need to be redeveloped if they were to become vacant.

Recommendations

6.165. The existing employment site contains units that are in need of redevelopment. However the site is not best suited to continued B-class employment use (see Map page 24 Appendix G).

Potential B-class Development Land

6.166. The employment site desk-top analysis and the site appraisals have identified two sources of potential employment land supply:

Vacant / Underutilised Land in Existing Employment Sites

6.167. Within the existing employment sites there are some vacant sites which have potential to be developed for employment uses. It is important to identify these opportunities as these areas are an important source of potential employment land. There is some 48.2ha of vacant land (not located in Green Belt) within existing employment sites (that were recommended for continued protection). These opportunities were identified on site and from aerial photography, are set out in Table 13. There is a further 4.4ha of opportunity land in sites in the Green Belt.

6.168. It should be noted that the site assessment identified that Site 18 Pitsea Hall Lane, Site 19 Sadlers Farm and Site 22 London Road (Vange) were not suitable for continued B-class employment uses and may not be brought forward for potential development.

Table 13. Vacant/Underutilised Land in Existing Employment Sites

Site	Sub Area	Size of Vacant Land (ha)	Opportunity
1 Wickford Business Park	Wickford	0.4	There is a parcel of land (0.4ha) that could be utilised for new B-class development.
2 Radford Way	Billericay	0.3	There is a car park (owned by the Council) that could potentially accommodate new B-class development.
3 Burnt Mills	Basildon	7.2	There are six parcels of land with a combined total of 7.2ha that could be utilised for new B-class development: No.3 – 0.8ha parcel of land (currently allocated for proposed employment) No.4 - 0.8ha parcel of land (currently allocated for proposed employment) No.5 – 0.2ha parcel of land (currently allocated for proposed employment) No.6 – 0.2ha parcel of land (partly allocated for proposed employment) No.7 – 1.3ha parcel of land (currently allocated for proposed employment)[22] No.8 – 3.8ha parcel of land (currently unallocated)
4 Cranes Industrial Estate	Basildon	13.5	There are three parcels of land with a combined total of 13.3ha that could be utilised for new B-class development: No.9 – 6.4ha parcel of land (currently allocated for proposed employment) No.10 - 4.0ha parcel of land (currently allocated for proposed employment) No.11 – 3.1ha parcel of land (currently allocated for proposed employment)
6 Festival Business Park	Basildon	4.3	There are two parcels of land with a combined total of 4.3ha that could be utilised for new B-class development: No.12 - 2.4ha parcel of land (currently unallocated) No.13 - 1.9ha parcel of land (currently unallocated Parcel No.14 is not available. It is functional floodplain known locally and by the Environment Agency as Turners Chase Washland. It has already been scaled down in size to build the surrounding employment uses

[22] This site is located within a Major Hazard Zone due to its close proximity to the Gas Holder in Archers Field in Site 3 Burnt Mills. This could constrain the future development of this site.

Site	Sub Area	Size of Vacant Land (ha)	Opportunity
7 Pipps Hill	Basildon	6.4	There is a strip of greenfield land (currently allocated as existing open space) covering some 6.4ha to the north of the site that could be developed for additional B-class uses as an expansion to the existing industrial estate.
11 Ford Technical Centre	Basildon	16.1	There are three parcels of land with a combined total of 16.1ha that could be utilised for new B-class development: No.16 – 13.2 ha parcel of land (currently allocated as Ford Research and Development Area) No.17 - 1.4ha parcel of land (currently allocated as Ford Research and Development Area) No.18 - 1.5ha parcel of land (currently allocated as Ford Research and Development Area)
Sub Total		**48.2**	
15 White Bridge Farm	Rural	1.2	There is a parcel of land (1.2ha) that could be utilised for new B-class use development.
19 Sadlers Farm	Rural	0.5	There is a parcel of land (0.5ha) that could be utilised for new B-class use development, although access improvements would be necessary to develop this.
20 Blue House Farm	Rural	0.8	There is a parcel of land (0.8ha) that could be utilised for new B-class use development.
21 Annwood Lodge	Rural	1.9	There is a parcel of land (1.9ha) that could be utilised for new B-class use development
Sub Total		4.4	
Total		**52.6**	

Source: Atkins Figures in the Table have been rounded to one decimal place. The opportunities in rural areas have not been taken forward in the analysis in later stages as they are located in the Green Belt.

Potential Sites

6.169. Outside of the existing employment sites, Atkins worked with Basildon Borough Council to identify locations that may have potential for new B-class employment uses. These sites has been subject to a desk-top appraisal, which is summarised in the following chapter 7, and include:

- 1 - Dunton Extension
- 2 - Dunton Wayletts Extension
- 3 - Hutton Extension
- 4 - Barleylands Depot
- 5 - North Basildon Extension
- 6 - East Wickford Extension

- 7 - South Wickford Extension
- 8 – Burnt Mills Extension
- 9 - East Basildon Extension
- 10 – West of North Benfleet
- 11 - Bowers Gifford Extension
- 12 - Vange (East of A176) Extension
- 13 – Dry Street South Extension
- 14 – Benfleet Triangle

7. Future Employment Needs

Introduction

7.1. The following section assesses Basildon Borough's future employment growth prospects and the resulting demand for employment land and premises. These employment forecasts will ultimately underpin our analysis of likely demand side floorspace requirements for B use classes (B1, B2 and B8) in the Borough in the period to 2031.

A Cautionary note on Forecasting

7.2. Forecasts provide an indication of what might happen in terms of future employment growth but are not definitive. It is difficult to predict with any certainty the levels of future employment growth in a particular area and therefore care should be taken when interpreting employment forecasts. Forecasts can vary depending on their source – Cambridge Econometrics, Oxford Economics and Experian are some of the key firms which produce employment forecasts and each adopts varying approaches which produce slightly different results.

7.3. It is difficult to predict future trends at any time but when there have been significant economic (e.g. recession) and political changes, it is even more difficult to produce forecasts which are reliable. Views on the international and UK economies form the basis of the regional view and the regions in turn feed the forecasts for their constituent local areas. District level forecasts are therefore influenced by the outlooks of the regional, national and international economies.

Methodology

Development of Future Employment Scenarios

7.4. Analysis in this section is based upon the latest employment forecasts for Basildon Borough generated by the Experian Economics Regional Planning Model (see Appendix H for further details). This is a highly sophisticated and respected econometric model. The raw data provided by the Experian Economics Regional Planning Model forms the basis of our Baseline Scenario for employment growth in Basildon Borough in the period to 2031.

7.5. We have also developed two additional scenarios based on varying levels of housing growth – a Lower Growth Scenario and a Higher Growth Scenario. These scenarios consider how housing numbers could impact upon job numbers and in consequence the need for employment land.

7.6. Ultimately, the three scenarios are designed to highlight the breadth of the spectrum of Basildon Borough's future employment growth and land demand. The characteristics of the three employment scenarios are summarised in Table 14 below.

Table 14. Summary of Employment Scenarios 2012 - 2031

Scenario	Description	Source
Scenario 1 – Baseline Scenario	• The Baseline Scenario presents the raw data generated by the Experian Economics Regional Planning Model. • The Experian forecasting approach is based on a methodology that combines long-term supply and demand influences with short-term demand side influences. • County and local/unitary authority area (LAD) forecasts are prepared once national and regional forecasts are finalised using a shift-share methodology. In broad terms, the historical performance of county economies is interpreted in terms of their share of the regional economy of which they are a part. In turn, the performance of the LAD areas is based on their share of their encompassing county.	Experian Economics
Scenario 2 – 17,000 homes between 2011 and 2031	• Higher housing growth led scenario assuming 17,000 new homes over the 20 year period, 2011 – 2031. • The scenario assumes that the employment breakdown by land use will be the same as in the Experian model. • Average household size, proportion of people of working age, economic activity rate, unemployment and commuting patterns are assumed to stay constant over the period to 2031.	Basildon BC and Atkins
Scenario 3 – 13,800 homes between 2011 and 2031	• Lower housing growth led scenario assuming 13,800 new homes over the 20 year period, 2011 – 2031. • The scenario assumes that the employment breakdown by land use will be the same as in the Experian model. • Average household size, proportion of people of working age, economic activity rate, unemployment and commuting patterns are assumed to stay constant over the period to 2031.	Basildon BC and Atkins

Converting Employment Projections into Floorspace Requirements

7.7. Employment sectors have been mapped to the core B1a/b (offices and general business), B1c (light industrial), B2 (general industrial) and B8 (storage and distribution) "employment" uses and job numbers have been converted to floorspace by applying appropriate employment density (set out in Table 15). Land demand is established by applying plot ratio assumptions (set out in Table 15) and converting the figures from square metres into hectares, to provide gross employment land requirements (1 hectare equals 10,000 sq.m).

7.8. The employment densities used are in line with the HCA's Employment Densities Guide 2nd Edition (2010) while the plot ratios used are in line with the Employment Land Reviews: Guidance Note (2004).[23] The employment density and plot ratio assumptions are summarised in Table 15 below.

[23] Employment Land Reviews: Guidance Note, Office of Deputy Prime Minister (ODPM), 2004

Table 15. Employment Density and Plot Ratio Assumptions

Use Class	Employment Density (sq.m per FTE)	Plot Ratio
B1a/b	12	75% of site area
B1c	47	40% of site area
B2	36	40% of site area
B8	70	50% of site area

Scenario 1: Baseline Scenario

7.9. The Baseline Scenario is derived from Experian's main forecasting model (December 2012). Experian's detailed local level forecasts are based on an integrated regional sectoral model of the UK. The model is constructed on the basis that each UK region and each sector of the economy is treated as an economic entity in its own right, for which forecasts can be made using historic relationships between variables. In broad terms, the historical performance of county economies is interpreted in terms of their share of the regional economy of which they are a part. In turn, the performance of local authority areas is based on their share of their encompassing county. For each sector of the economy (38 Standard Industrial Classification 1997 revision sectors), equations are produced for output and employment that explain the observable relationship between these variables at the local and regional level. A full description of Experian's forecasting methodology is presented in Appendix H.

7.10. According to the Experian model, the number of Basildon Borough's B use class jobs is forecast to grow by 10% over the period 2012-2031, reaching approximately 41,500 Full Time Equivalent (FTE) jobs in 2031. Employment in the B1a/b and B8 sectors (primarily office based and warehousing) is forecast to increase by 19.1% and 14.6% respectively, whereas employment in the B1c and B2 sectors (light and general industrial) is forecast to decline by 15.4% and 16.7% respectively. A summary of the Baseline Scenario employment forecasts is presented in Table 16 below.

Table 16. Experian Employment Forecasts (FTEs) (jobs)

Use Class	2012	2016	2021	2026	2031	Change 2012-2031
B1a/b	21,415	22,427	23,737	24,603	25,504	4,089
B1c	2,251	2,275	2,169	2,029	1,904	-347
B2	6,501	6,627	6,266	5,814	5,418	-1,083
B8	7,567	8,080	8,348	8,502	8,675	1,108
Total B use class sectors	37,734	39,409	40,520	40,948	41,501	3,767

Source: Experian, Atkins. Figures in the Table have been rounded.

7.11. Based on the employment forecasts in Table 16 and the employment density and plot ratio assumptions summarised in Table 15 Basildon Borough's employment floorspace and land requirements over the period 2012-2031 are forecast to be as follows:

Table 17. Employment Floorspace Need (sq.m)

Use Class	2012	2016	2021	2026	2031	Change 2012-2031
B1a/b	256,980	269,118	284,844	295,231	306,042	49,062
B1c	105,797	106,925	101,943	95,363	89,488	-16,309
B2	234,036	238,572	225,583	209,294	195,064	-38,972
B8	529,690	565,600	584,367	595,165	607,265	77,575
Total B use class sectors	1,126,503	1,180,215	1,196,737	1,195,053	1,197,860	71,357

Source: Experian, Figures in the Table have been rounded.

Table 18. Employment Land Need (ha)

Use Class	2012	2016	2021	2026	2031	Change 2012-2031
B1a/b	34.3	35.9	38.0	39.4	40.8	6.5
B1c	26.4	26.7	25.5	23.8	22.4	-4.1
B2	58.5	59.6	56.4	52.3	48.8	-9.7
B8	105.9	113.1	116.9	119.0	121.5	15.5
Total B use class sectors	225.2	235.4	236.7	234.6	233.4	8.2

Source: Experian, Atkins Figures in the Table have been rounded to one decimal place.

7.12. According to the Experian scenario, B1a/b land demand will grow by 6.5 ha (19.1%) over the period 2012-2031 and B8 land demand will grow by 15.5 ha (14.6%). Land demand for B1c and B2 uses will decline by 4.1ha and 9.7 ha respectively (-15.4% and -16.7% in terms of percentage change).

7.13. The overall employment land need in the Borough will increase by 8.2 ha (see Table 18). This however assumes that all surplus B1c and B2 land will be re-used for B1 and B8 purposes. It is possible that some of the surplus B1c and B2 land could be used to accommodate demand in the growing B1a/b and B8 sectors but it is likely that the poorer quality industrial sites would not be fit for B1a/b and B8 uses. Therefore, it is likely that the actual need for new employment land by 2031 will be more than 8.2 ha and could be as high as 22 ha[24].

Scenario 2: Higher Housing Growth Scenario

7.14. Scenario 2 tests how potential housing growth will impact upon job numbers and in consequence, employment land. It assumes that 17,000 new homes will be delivered in Basildon Borough over the period 2011-2031. This has been determined by the Sub-National Population Projections. It is noted that whilst there is a high level of in and out commuting within the Borough, there is still a relationship between the level of housing within an area and the jobs provided. This scenario explores the level of local employment that would be generated by the provision of 17,000 new homes.

7.15. Scenario 2 uses a number of assumptions to convert housing growth into local jobs and floorspace and land requirements. To simplify the model (given the large number of variables involved) it has been assumed that all assumptions will stay constant over the period to 2031. The full list of assumptions is summarised in Table 19 below.

[24] This figure is the sum of the demand for B1a/b (6.5ha) and B8 (15.5ha), if land currently used for B1c and B2 uses is not used or cannot be used for B1a or B8 then up to 22ha of land would be required to meet demand.

Table 19. Scenario 2 Assumptions

Assumption		Source
Number of homes	17,000 (810 per year between 2011 and 2031)	ONS SNPP and Edge Analytics – EPOA Greater Essex Population and Household Forecasts 2013
Average household size	2.38	2011 Census
Proportion of population that is of working age	63.79%	2011 Census
Economic activity rate	71.20%	2011 Census
Unemployment rate	6.50%	2011 Census
Proportion of Basildon Borough residents in employment that work in Basildon Borough	53%	Essex Economic Assessment
Employment breakdown by land use	Same as Experian model	Experian / Atkins

7.16. According to Scenario 2, 17,000 new homes by 2031 would generate some 9,000 new jobs based in Basildon Borough. Approximately 6,480 of these jobs would be in B use class sectors. The biggest proportion of the new jobs would be in B1a/b sectors (approximately 2,700 jobs).

7.17. A summary of Scenario 2's employment projections is presented in Table 20 below.

Table 20. Scenario 2 B Use Class Employment Projections

Use Class	2012	2016	2021	2026	2031
B1a/b	253	760	1,405	2,057	2,713
B1c	51	153	273	384	487
B2	149	446	793	1,112	1,405
B8	174	529	974	1,423	1,875
Total B use class sectors	**628**	**1,888**	**3,445**	**4,976**	**6,479**

Source: Atkins Figures in the Table have been rounded.

7.18. Based on the above employment projections and the employment density and plot ratio assumptions summarised in Table 15 Basildon Borough's employment floorspace and land requirements over the period 2012-2031 are forecast to increase as follows:

Table 21. Scenario 2 Employment Floorspace Projections (sq.m)

Use Class	2012	2016	2021	2026	2031
B1a/b	3,035	9,120	16,856	24,681	32,556
B1c	2,418	7,213	12,834	18,044	22,869
B2	5,370	16,047	28,549	40,028	50,573
B8	12,187	37,001	68,198	99,610	131,247
Total B use class sectors	**23,010**	**69,382**	**126,438**	**182,363**	**237,244**

Source: Atkins Figures in the Table have been rounded.

Table 22. Scenario 2 Employment Land Projections (ha)

Use Class	2012	2016	2021	2026	2031
B1a/b	0.4	1.2	2.2	3.3	4.3
B1c	0.6	1.8	3.2	4.5	5.7
B2	1.3	4.0	7.1	10.0	12.6
B8	2.4	7.4	13.6	19.9	26.2
Total B use class sectors	**4.8**	**14.4**	**26.2**	**37.7**	**49.0**

Source: Atkins Figures in the Table have been rounded to one decimal place.

7.19. The overall employment land need in the Borough is projected to increase by approximately 49 ha between 2011 and 2031 as a result of building 17,000 new homes. Approximately half of this demand is projected to be for B8 land, this is primarily because of the low employment densities usually associated with B8 land uses.

7.20. It should be noted that the above projections estimate the change in employment and employment land demand resulting exclusively as a result of housing and population growth. In reality, employment change (and therefore employment land demand) is likely to be influenced by a range of factors in addition to population change. These include the wider economic conditions, household income and expenditure levels, structural economic changes, technological and operational changes and changes to labour force characteristics.

7.21. Therefore, this housing led scenario should be considered alongside the base Experian scenario. The Experian model incorporates ONS population projections which are significantly lower than the population growth that would result from 17,000 new homes. We estimate that the Experian model's population growth projections account for only a fifth of the population growth that would result from 17,000 new homes.

7.22. Based on the above, about 80% of the employment land need identified in Scenario 2 (see Table 22) can be considered as additional to the base Experian scenario (set out in Table 18). Based on this assumption, the combined demand from Scenarios 1 and 2 is summarised in Table 23 below:

Table 23. Combined Scenario 1 and Scenario 2 Employment Land Projections (Ha)

Use Class	2012	2016	2021	2026	2031
B1a/b	35	37	40	42	44
B1c	27	28	28	27	27
B2	60	63	62	60	59
B8	108	119	128	135	142
Total B use class sectors	**229**	**247**	**258**	**265**	**273**

Source: Atkins[25] Figures in the Table have been rounded.

[25] This table combines the employment land needs for the base scenario set out in Table 18 with 80% of the needs identified in Scenario 2 (see Table 22). Figures have been rounded.

7.23. The additional employment land requirements between 2012 and 2031 taking into consideration both Scenarios 1 and 2 are summarised in Table 24 below. It should be noted that the figures in Table 24 represent the difference between the existing needs in 2012 according to the baseline scenario (set out in Table 18) and the total combined needs in 2031 (set out in Table 23). This is because Scenario 2 assumes the delivery of 810 new dwellings per year starting from 2011. This means that approximately 1,620 dwellings are assumed to have been built in 2011 and 2012, leading to increased population and increased demand for jobs and employment land. However it is assumed that the effects of 1,620 new dwellings built in 2011-2012 are not included in the baseline scenario 2012 figures (which are taken from Experian).

Table 24. Additional Employment Land Need - Combined Scenario 1 and Scenario 2 (Ha)

Use Class	Change 2012-2031
B1a/b	10
B1c	1
B2	0
B8	37
Total B use class sectors	**47**

Source: Atkins. Figures in the Table have been rounded

7.24. Combined, Scenarios 1 and 2 suggest that Basildon Borough will need some 47 ha of additional employment land by 2031. B8 will account for the majority of this additional land demand. Demand for industrial land is forecast to stay broadly constant.

Scenario 3: Lower Housing Growth Scenario

7.25. Scenario 3 is similar to Scenario 2 but assumes that 13,800 new homes will be delivered in Basildon Borough over the period 2011-2031.This is in line with the Regional Spatial Strategy which is now revoked but was previously the regional planning context for the Borough, sub-region and County.

7.26. Scenario 3 uses the same assumptions as Scenario 2 to convert housing growth into local jobs and floorspace and land requirements (these are listed in Table 14). The only difference is the number of homes, which is assumed to be 657 per year (a total of 13,800 between 2011 and 2031.

7.27. According to Scenario 3, 13,800 new homes by 2031 would generate some 7,400 new jobs based in Basildon Borough. Approximately 5,260 of these jobs would be in B use class sectors. The biggest proportion of the new jobs would be in B1a/b sectors (approximately 2,200 jobs).

7.28. A summary of Scenario 3's employment projections is presented in Table 25 below.

Table 25. Scenario 3 B Use Class Employment Projections

Use Class	2012	2016	2021	2026	2031
B1a/b	205	617	1,140	1,670	2,202
B1c	42	125	222	312	395
B2	121	362	644	903	1,140
B8	141	429	791	1,155	1,522
Total B use class sectors	**509**	**1,532**	**2,797**	**4,039**	**5,260**

Source: Atkins Figures in the Table have been rounded to one decimal place.

7.29. Based on the above employment projections and the employment density and plot ratio assumptions summarised in Table 15 Basildon Borough's employment floorspace and land requirements over the period 2012-2031 are forecast to increase as follows:

Table 26. Scenario 3 Employment Floorspace Projections (sq.m)

Use Class	2012	2016	2021	2026	2031
B1a/b	2,463	7,404	13,683	20,035	26,428
B1c	1,963	5,856	10,419	14,648	18,564
B2	4,359	13,026	23,175	32,493	41,053
B8	9,893	30,036	55,361	80,860	106,542
Total B use class sectors	**18,678**	**56,321**	**102,638**	**148,036**	**192,586**

Source: Atkins Figures in the Table have been rounded to one decimal place.

Table 27. Scenario 3 Employment Land Projections (ha)

Use Class	2012	2016	2021	2026	2031
B1a/b	0.3	1.0	1.8	2.7	3.5
B1c	0.5	1.5	2.6	3.7	4.6
B2	1.1	3.3	5.8	8.1	10.3
B8	2.0	6.0	11.1	16.2	21.3
Total B use class sectors	**3.9**	**11.7**	**21.3**	**30.6**	**39.7**

Source: Atkins Figures in the Table have been rounded to one decimal place.

7.30. Under Scenario 3, the overall employment land need in the Borough is projected to increase by approximately 40 ha as a result of building 13,800 new homes by 2031. Approximately half of this demand is projected to be for B8 land, this is primarily because of the low employment densities usually associated with B8 land uses.

7.31. As with Scenario 2, the above projections estimate the change in employment and employment land demand resulting exclusively as a result of housing and population growth and do not take into account other factors. We estimate that the Experian model's population growth projections account for approximately a quarter of the population growth that would result from 13,800 new homes.

7.32. Based on the above, about 75% of the employment land need identified in Scenario 3 (see Table 27) can be considered as additional to the base Experian scenario (see Table 18). Based on this assumption, the combined demand from Scenarios 1 and 3 is summarised in Table 28 below:

Table 28. Combined Scenario 1 and Scenario 3 Employment Land Projections (ha)

Use Class	2012	2016	2021	2026	2031
B1a/b	35	37	39	41	43
B1c	27	28	27	27	26
B2	59	62	61	58	57
B8	107	118	125	131	137
Total B use class sectors	**228**	**244**	**253**	**258**	**263**

Source: Atkins[26] Figures in the Table have been rounded to one decimal place.

[26] This table combines the employment land needs for the Base Scenario set out in Table 18 with 75% of the needs identified in Scenario 3 (see Table 27). Figures have been rounded.

7.33. The additional employment land requirements between 2012 and 2013 taking into consideration both Scenarios 1 and 3 are summarised in Table 29 below. The figures in Table 29 represent the difference between the existing needs in 2012 according to the baseline scenario (set out in Table 18) and the total combined needs in 2031 (set out in Table 28).

Table 29. Additional Employment Land Need - Combined Scenario 1 and Scenario 3 (ha)

Use Class	Change 2012-2031
B1a/b	9
B1c	-1
B2	-2
B8	32
Total B use class sectors	**38**

Source: Atkins Figures in the Table have been rounded to one decimal place.

7.34. In combination, Scenarios 1 and 3 suggest that Basildon Borough will need some 38 ha of additional employment land by 2031. B8 will account for the majority of this additional land demand (mainly as a result of low B8 employment densities) while demand for industrial land is projected to decline by approximately 3 ha.

7.35. It should be stressed however that all forecasts presented in this chapter should be treated as broad estimates only. Given the number of assumptions underpinning the housing led models and the inherent uncertainty of longer-term forecasting (especially given the current volatile economic conditions) we recommend that all employment land forecasts should be reviewed, evaluated and updated on a regular basis as part of the Council’s ongoing planning for the future development of the Borough.

8. Future Employment sites supply requirements

Introduction

8.1. Chapters 4, 5, 6, and 7 have highlighted the main issues facing Basildon Borough in terms of current supply and future demand for employment. This section assesses the suitability of existing identified employment sites in Basildon Borough to meet future business accommodation requirements to 2031.

8.2. The process undertaken can be summarised as follows:

- The amount of additional floorspace that needs to be provided in order to meet future requirements has been identified. This yields an estimate of net land requirements to be provided during the period to 2031 (chapter 7);
- The existing employment sites have been evaluated in terms of their suitability for future employment use (see below); and
- Recommendations on amount of floorspace potentially available (see below).

8.3. The site suitability evaluation matrix is provided in Appendix E.

Refining a Future Portfolio of Employment Sites

Future Employment Requirements

8.4. Floorspace forecasts identified in chapter 7 highlight an indicative net floorspace requirement of 71,357 sq.m. Demand is primarily concentrated in B1a and B8 premises, with potentially up to 22 hectares of demand under the Baseline Scenario.

8.5. In order to meet employment land requirements to 2031, it is necessary to firstly identify employment locations which have the physical potential to accommodate future growth. This has been achieved through the taking stock assessment, comprehensive site appraisals presented in chapter 6 and discussions with local property agents. Additionally, it is necessary to evaluate sites judged to provide development potential in terms of their suitability to meet future requirements.

Evaluation of Site Suitability

8.6. Consistent with best practice guidelines[27] the suitability of existing employment locations has been considered in order to assess the existing balance of sites in terms of their location and suitability. Scoring matrices have been prepared utilising the following criteria (where applicable) to assess the sites:

- Access;
- Sustainable development criteria;
- Environmental quality of site and surroundings;
- Market requirements and perceptions; and
- Policy considerations.

8.7. A range of different indicators has been derived within each category to address different issues and constraints. Each location has been scored against each indicator. Points have been assigned based on descriptive criteria which most accurately reflected the site. A composite percentage score is then used to equally weight the results of the indicators. Sites are then ranked according to the composite score. It is important to highlight that the scoring system is

[27] ODPM Employment Land Reviews guidance (2004)

intended to assist the local authority in taking a strategic view of the comparative suitability of each site for employment use. The scoring system should not be used in a prescriptive manner.

8.8. The site assessment matrix is given in Appendix E, along with a table setting out a full explanatory rationale as to how each score has been assessed.

Access

Public Transport Access: Proximity to Bus Network

8.9. Access to efficient public transport links is an important determining factor in encouraging sustainable travel to work patterns. The distance from a public transport interchange and the frequency of the public transport service are important in determining public transport accessibility of existing and potential employment locations.

8.10. The assessment of public transport accessibility has been based upon proximity of each location to the public transport network. Due to the nature of the public transport network in the study area (i.e. rail to serve commuting to London) it is considered more appropriate to measure each site by its access to the bus network from the edge of the site.

8.11. An excellent score of five was given to sites that had a bus stop within 100m; sites were deemed to be good if they are within 400m of a bus stop and awarded four points; three points were awarded for sites with fair access (within 800m of a bus stop); and one point was awarded to sites that are further than 800m from a bus stop. Distances were estimated based on the quickest pedestrian route from the site entrance. The distances are considered to be reasonable pedestrian walking distances and are consistent with the measurements used in the SHLAA.

Proximity to the Strategic Road Network

8.12. The importance of being located close to the strategic road network (SRN) varies according to business sector, the stage in the supply chain, market access dependencies and the frequency of inward and outward deliveries. Firms within the B8 use class who are engaged in storage and distribution activities are likely to attach the most importance to proximity and access to the SRN. B1c firms may also have strong business need for good access to the road network.

8.13. Points have been awarded to employment sites on the following basis: five points (excellent) for sites immediately adjacent to the SRN; four points (good) for sites within 1km of the SRN; three points (fair) for sites between 1km and 3km from the SRN; one point (poor) for sites between 3 and 10km form the SRN; and no points for sites further than 10km from the SRN. Distances were measured on a straight line basis. The SRN serving the study area includes the following regional / national routes:

- A129
- A127
- A13
- A130
- A176
- A132
- A1245.

Sustainability

Sequential test

8.14. The location of employment sites has been considered on a sequential basis to provide a measure of the centrality (providing access to other services and firms) of the location and the extent to which the site can be accessed by the majority of people by sustainable modes of transport (access to labour). The highest score has been attributed to locations within the existing urban area (five points) followed by locations on the edge of existing urban areas i.e. adjacent to the settlement boundaries (three points), and rural locations i.e. outside settlement boundaries (one point).

Environmental Quality of Site and Surroundings

Site Quality, Image and Management

8.15. The quality of site landscaping in relation to other sites in the study area and evidence of site management (including upkeep of planting, removal of litter/vandalism etc.) have been considered, as these can influence the type of occupier a particular site may be able to attract. Sites of the highest quality with good landscaping, high specification occupiers and a good level of site management have been awarded five points (excellent). Sites of good quality with adequate landscaping, some evidence of management and a range of occupiers have been awarded four points (good). Sites where an adequate attempt has been made at landscaping and site management have been awarded three points (fair) and sites with little evidence of landscaping or site management one point (poor).

8.16. Access to amenities can be an important factor in deciding where to locate for certain types of occupier, for example office based businesses often prefer to be located in areas that have a range of amenities available as this makes their location a more attractive to potential employees and existing employees. Sites with a range of on-site amenities (such as, childcare provision, sitting out areas, catering/food drink, banks, other services) have been awarded five points (excellent), sites with a café on site or immediately adjacent to site have been awarded four points (good), sites with local amenities within ten minutes walk have been awarded three points (fair) and sites with no amenities within a ten minute walk one point (poor).

8.17. The condition of buildings within a site can also have an impact on site occupation. Where buildings have been considered to all be in good condition, with no requirement for change, five points have been awarded (excellent). If the majority of buildings are in good condition, but there is some need for maintenance four points (good) have been awarded. Sites where buildings appear to be adequate for the existing occupiers, and have no visual evidence of major dilapidation, have been awarded three points (fair). Lastly, should the majority of buildings require refurbishment, only one point (poor) has been awarded.

Market Considerations (Perception and Demand)

8.18. The market attractiveness of sites varies according to the demand for different types of premises. Market perceptions are also influenced by factors such as the desirability of an area as an employment location, the quality of the environment surrounding a site and the accessibility of a site.

8.19. Good location and access are often viewed as pre-requisites for employment sites, and exert a strong influence on marketability of a site for employment use. A potential site must meet the minimum size requirement needed to make a given development economically viable. For B-class floorspace in new locations it is necessary to provide sufficient land for a critical mass of similar activities to be established. The size of a parcel varies according to the target sector and size of premises to be provided. Consequently, a relatively small site may be large enough to make B1(a) development feasible, but may be too small for B1(c) development.

8.20. Certain occupiers may have particular site requirements depending on the operations of their business, particularly in terms of accessibility and environmental requirements. For example, head quarters occupiers within some sectors have a preference for a high quality business park type environment in a prominent location whereas similar functions in other sectors are less prescriptive. B1(c) and B8 firms typically require purpose built low density sites in order to undertake their operations in an efficient manner and to allow room for expansion in situ.

8.21. An assessment has been made of the market attractiveness of each site in terms of:

- suitability in meeting the locational, use class and size requirements for the area in which it is located;
- flexibility of the site in meeting the needs of a range of employment requirements;
- scope to meet market demand requirements;
- accessibility by road and public transport; and
- potential to establish an attractive environment to meet the needs of the target use class(es).

Marketability of Existing Employment Sites

8.22. The marketability of existing employment sites has been assessed for both the present and the medium / long term future. The future marketability of each existing site has been assessed in order to evaluate the potential to meet future growth requirements, and accommodate growth sectors. This assessment has been made on the basis of the factors described above, using a scale of one to five (one = poor, five = excellent).

8.23. The maximum of the scores (present marketability and future marketability scores) has been used to represent the overall marketability of each existing site.

Policy Considerations

8.24. The potential for each site to meet strategic objectives has been factored into the assessment.

Local Employment Policies

8.25. Each site has been assessed in accordance with the development criteria of local employment policy. Points have been awarded on a scale of one = no conformity to five = high level of conformity.

Scope for Change in Basildon Borough

8.26. Sites were assessed in terms of their possible scope for change with a view to potentially either:

- provide additional employment floorspace to accommodate employment growth; or
- provide new, up-to-date or upgraded premises to meet the needs of modern businesses through redevelopment, intensification or refurbishment.

8.27. This assessment differentiated sites (or parcels of land therein) which show some short-term (1-3 years) development opportunities from those where upgrading of premises on site through redevelopment, intensification or refurbishment represents a medium (3 – 5 years) or long-term (5+ years) opportunity (subject to viability constraints).

Evaluation of Existing Employment Sites

8.28. All of the sites assessed by the appraisal process have been evaluated to determine their ongoing suitability as employment sites. Table 13 and Table E1 in Appendix E display the results of the evaluation along with the rationale for the evaluation.

8.29. For the purposes of evaluating the potential capacity of existing employment sites, we have assumed that there will be no loss of employment floorspace or land from these to other uses during the plan period.

Existing Employment Sites

8.30. Table 30 identifies the employment suitability score of existing sites in Basildon Borough:

- 16 sites received a good score (over 60%)
- 5 sites received a fair score (between 41% - 59%)
- 3 sites received a poor score (40% and below).

8.31. Site 18 Pitsea Hall, Site 19 Sadlers Farm and Site 22 London Road (Vange) have performed poorly in the assessment. Although the sites are currently occupied, if they become vacant they may be more difficult to re-let due to the poor condition of the site.

8.32. Site 14 Guildprime, Site 15 White Bridge Farm, Site 16 London Road Clusters, Site 17 Vange Wharf and Site 21 Annwood Lodge have all received a fair score and may have potential redevelopment opportunities, such as upgrading premises and improving the site quality and image.

Table 30. Employment Suitability Assessment Score and Scope of Change for Existing Employment Sites

Sites	Overall Suitability Score (%)	General Comments	Scope for Change
1 - Wickford Business Park	69	Established good quality employment site that should continue to be protected.	Short Term – A vacant/underutilised parcel of land within the existing employment site could be utilised for new B-class development.
2 - Radford Way	69	Established good quality employment site that should continue to be protected.	Medium Term – A car park site (owned by the Council) could be better utilised for new B-class development. The Council would need to present a business case for change of use. The Council would need to consider the merits of releasing this land through its asset review process.
3 - Burnt Mills	71	Established good quality employment site that should continue to be protected.	Short/Medium Term – A number of vacant/underutilised parcels represent short-term opportunities as they are located within the existing employment site and could be utilised for new B-class development. The Tree Nursery site represents a medium-term opportunity. The Council would need to consider the merits of releasing this land through its asset review process. In addition, as the site is in the urban area, it does not have to be formally designated as employment land to be brought forward.
4 - Cranes Industrial Estate	72	Established good quality employment site that should continue to be protected.	Medium Term – The vacant greenfield parcel could be utilised for new B-class development and would need to be de-designated as an existing open space site allocation.
5 - Case New Holland Tractor Park	71	Established good quality employment site that should continue to be protected.	No scope for change.
6 - Festival Business Park	72	Established good quality employment site that should continue to be protected.	Medium Term – The two vacant/underutilised parcels would need to be designated as employment land.

Sites	Overall Suitability Score (%)	General Comments	Scope for Change
7 - Pipps Hill	71	Established good quality employment site that should continue to be protected.	Medium Term – The vacant greenfield parcel could be utilised for new B-class development and would need to be de-designated as an existing open space site allocation.
8 – IFDS	73	Established good quality employment site that should continue to be protected.	No scope for change.
9 - Laindon North	72	Established good quality employment site that should continue to be protected.	No scope for change.
10 - Wrexham Road	70	Established good quality employment site that should continue to be protected.	No scope for change.
11 - Ford Technical Centre	64	Established good quality employment site that should continue to be protected.	Medium Term – The three greenfield parcels could be utilised for new B-class development and would need to be de-designated as an Automotive Research and Development area allocation. Or they could be delivered through a formal departure of the Local Plan Saved Policy, which is how the car showroom and residential scheme on the site have been permitted.
12 – Southfields	72	Established good quality employment site that should continue to be protected.	No scope for change.
13a - Basildon Town Centre	73	Town centre location that provides an important location for B-class activities, particularly B1a (office).	Long Term – The Basildon Town Centre Masterplan identifies the potential to accommodate 25,000sq.m of new office development.
13b - Billericay Town Centre	73	Town centre location that provides an important location for B-class activities, particularly B1a (office).	Little scope for change.
13c - Wickford Town Centre	73	Town centre location that provides an important location for B-class activities, particularly B1a (office).	Long Term – The Wickford Town Centre Masterplan identifies the potential to accommodate 1,000 sq.m of mixed commercial development.

Sites	Overall Suitability Score (%)	General Comments	Scope for Change
14 - Guildprime	41	The site is located within the Green Belt. The Guildprime Business Centre is a self-contained site providing for a mixture of B1a, B2 and B8 uses. The site has fair quality warehousing and poorer quality general industrial areas (that could be upgraded over time). The site has a good level of occupancy and should be protected as an employment site.	No scope for change
15 - White Bridge	48	The site is located within the Green Belt. White Bridge Farm supports mainly general industrial uses (B2).The site has fair quality warehousing and poor quality general industrial areas (that could be upgraded over time). There is vacant / underutilised land that could provide opportunity for further expansion. The site has a good level of occupancy and should be protected as an employment site.	Long Term – The site is within the Green Belt and not protected for employment uses. There is a parcel of land that could be utilised for new B-class development and the land would need to be released from the Green Belt.
16 - London Road Clusters	51	The site is located within the Green Belt. The clusters on the London Road support mainly general industrial uses (B2). Generally the sites are of a fair quality, but some of the general industrial areas could be upgraded or redeveloped over time. The high concentration of employment activity along this road demonstrates the desirability of this location for employment uses. The site should therefore be protected for employment uses.	No scope for change.
17 - Vange Wharf	45	The site is located within the Green Belt. The site is a self contained general industrial area and should be protected for employment uses. The quality of the existing units is fair so would not require redevelopment. The site should be protected for employment uses.	No scope for change.

Sites	Overall Suitability Score (%)	General Comments	Scope for Change
18 - Pitsea Hall Lane	30	The site is located within the Green Belt. The site is a contained general industrial area, however the units are in poor quality.	No scope for immediate change. The site is also located within the Green Belt and the site is surrounded by sensitive uses (SSSI/LoWS) and therefore is not best suited to continued employment use. Any redevelopment would need to overcome these constraints if the site is to continue in employment use.
19 - Sadlers Farm	38	The site is located within the Green Belt. The site is a self contained general industrial area, however the units are in poor quality. Also expansion of the site would require access improvements.	No scope for immediate change. The site is within the Green Belt and not protected for employment uses. There is a parcel of land that could be utilised for new B-class development but this would require access improvements and the land would need to be released from the Green Belt. However, given that the site is not best suited to continued employment use, there is considered to be no scope for change.
20 - Blue House Farm	63	The site is a self-contained general industrial area. There is an opportunity to introduce general industrial uses (B2) on the land behind the training centre that fronts onto London Road (B1464). The site should be protected for employment uses.	Long Term – The site is within the Green Belt and not protected for employment uses. There is a parcel of land that could be utilised for new B-class development, but the land would need to be released from the Green Belt.
21 - Annwood Lodge	52	The site is located within the Green Belt. The site is a self contained general industrial area. There is an opportunity to introduce general industrial uses (B2) on land south of the industrial area.	Long Term – The site is within the Green Belt and not protected for employment uses. There is a parcel of land that could be utilised for new B-class development, but the land would need to be released from the Green Belt.
22 - London Road, Vange	38	The site is located within the Green Belt. The site is a self-contained general industrial area; however the units are in poor quality and may need to be redeveloped.	No scope for change. The premises are likely to upgraded overtime depending on the owners requirements. The site is located within the Green Belt and therefore any redevelopment would need to take account of this.

Source: Atkins

Potential Strategic Employment Locations

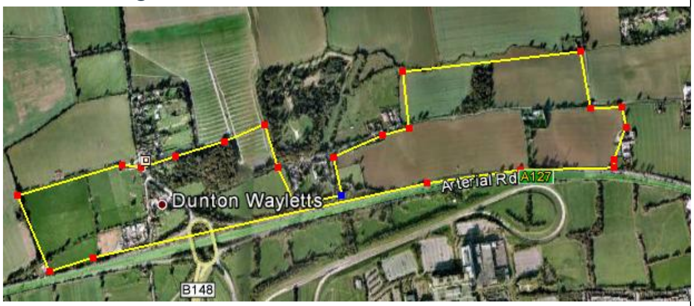
8.33. Outside of the existing employment sites, Basildon Borough Council has identified 14 key locations (see Appendix J for an overview map) that could potentially be developed for employment uses if additional employment land is required to meet demand over the plan period. These sites have been subject to a strategic level desk-top appraisal.

8.34. The primary purpose of this assessment is to assist the Council in making policy decisions which are based on making the best possible use of existing employment land assets that have been identified during this study as being suitable for employment use. Table 31 provides the employment suitability score of potential sites in Basildon Borough:

- 2 sites received a good score (over 60%)
- 9 sites received a fair score (between 41% - 59%)
- 3 sites received a poor score (40% and below).

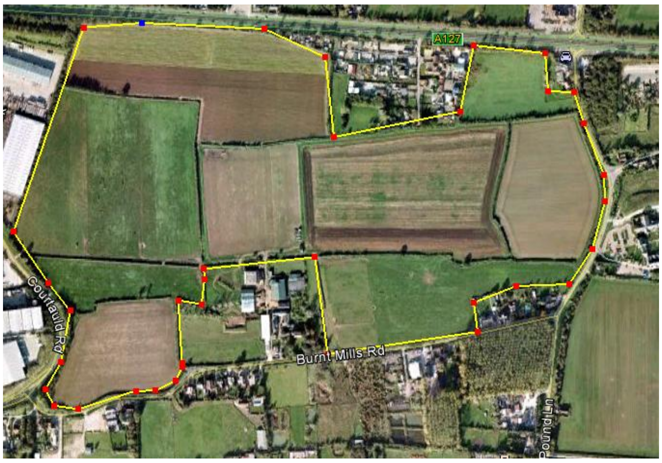
8.35. All of the sites are in locations beyond existing settlement boundaries and are on Green Belt land and would therefore need to be released and designated for B-class development. Basildon Borough Council would need to carry out further detailed site assessments and consult with land owners and tenants before the land can be considered as forming a component of future supply to accommodate employment needs during the period to 2031.

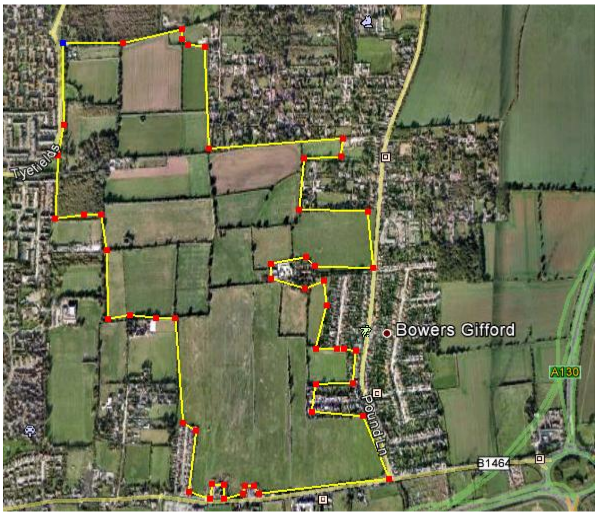
Table 31. Employment Suitability Assessment Score and Scope of Change for Potential Strategic Locations

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
1 - Dunton Extension	58	Adjacent to existing employment site (Site 12 Southfields and Site 11 Ford Technical Centre. Good strategic transport links and public transport links. The site is located within the Green Belt. There are various farms and smaller employment uses here.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall. 
2 - Dunton Wayletts Extension	64	Adjacent to existing employment sites (Site 11 Ford Technical Centre and Site 9 Laindon North). Good strategic transport links and public transport links. The site is located within the Green Belt. The emerging landscape study has identified this location as being sensitive to change from a landscape perspective.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores good overall. 

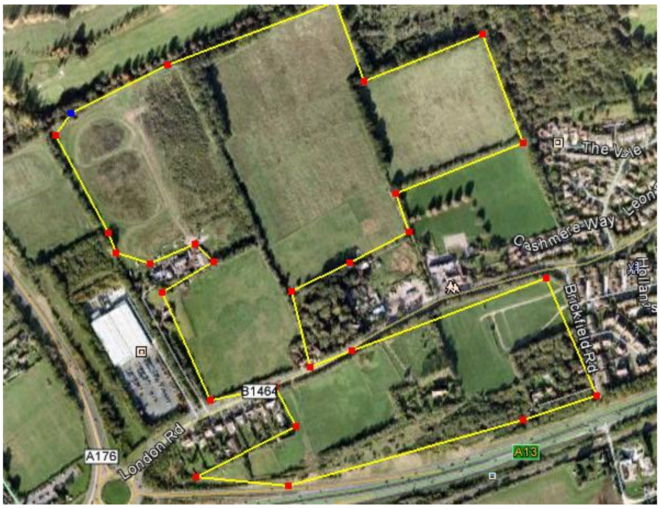
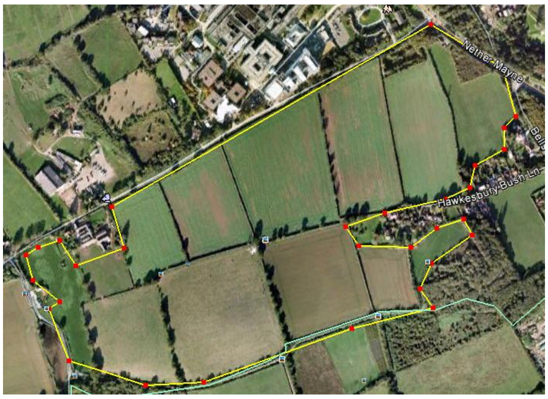
Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
3 - Hutton Extension	46	Adjacent to existing B-class employment site area (Site 16 London Road Clusters). Good strategic transport links and public transport links. The site is located within the Green Belt. The eastern part of this area was submitted in the SHLAA and found to be suitable, available and achievable. There is a gas pipeline running north south across the area and flood zone 3a is to the western part of the area along the Borough boundary.	Long Term – The site would be suitable for B class employment in Long Term, although the site is within the Green Belt and would need to be released to allow B-class development. The site scores fair overall. 
4 - Barleylands Depot	62	Barleylands Council Depot Site. Good strategic transport links and public transport links. The site is located within the Green Belt. The site is owned by Basildon Borough Council and was found unsuitable in the SHLAA. As such, if the Council wish to dispose of the site, employment would be the most appropriate option.	Long Term – The site is fully developed and occupied by the Barleylands Council Depot. The site is within the Green Belt and future redevelopment would need to respect this designation. The site scores good overall. 

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
5 - North Basildon Extension	54	Adjacent to existing employment sites (Site 4 Cranes Industrial Estate and Site 3 Burnt Mills) but separated by A127. Although, good strategic transport links and public transport links there is a possibility that development of this site could result in the merging of settlements (Wickford and Basildon). The site is located within the Green Belt. North Basildon Extension was found to be suitable, available and achievable for residential uses in the recent SHLAA. Part of the site has existing business use and traffic issues could present a problem due to its proximity to the A127, but this may also be considered an opportunity. Any potential extension would be considered as a possible breach to the A127 which currently forms a definable boundary to the Basildon area. In addition, Noke Wood is located in the centre of the site is designated as a LoWS. The emerging landscape study has identified this location as being sensitive to change due to the site topography.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall. 
6 - East Wickford Extension	56	Part of Site adjacent to existing employment site (Site 1 Wickford Park). Good strategic transport links and public transport links. The site is located within the Green Belt. Parts of the site are at significant risk of flooding. Most of the Shotgate area was submitted via the SHLAA, and most of it found unsuitable for residential uses.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall. 

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
7 - South Wickford Extension	26	Good strategic transport links and public transport links. The site is located within the Green Belt. Parts of the site are at significant risk of flooding. Segregated location and risk to settlement coalescence is the threat in this location.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. This strategic area would not be well suited to employment growth. The site scores poor overall. 
8 - Burnt Mills Extension	60	Good strategic transport links and public transport links. The site is located within the Green Belt. Parts of the site are at significant risk of flooding. The site is adjacent to an existing B class employment area (Site 3 Burnt Mills).	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall. 
9 - East Basildon Extension	52	Good strategic transport links and public transport links. The site is located within the Green Belt. Parts of the site are at significant risk of flooding. The eastern part of the site is constrained by high traffic congestion levels along the A130 corridor.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall.

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
			
10 – West of North Benfleet	58	Good strategic transport links and public transport links. The site is located within the Green Belt. Parts of the site are at significant risk of flooding. The site is close to Little Chaveldon Hall was identified in the SHLAA for additional housing (approximately 1,000 units). Whilst, the northern part of the site close to the A127 could provide a location for employment growth, there is a risk to settlement coalescence between the main urban area of Basildon and Bowers Gifford.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall. 

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
11 - Bowers Gifford Extension	48	Poor access to strategic links and public transport links. The site is located within the Green Belt.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. The site scores fair overall. 

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
12- Vange (East of A176) Extension	44	Good strategic transport links and public transport links. The site is located within the Green Belt. There is an SSSI within 500metres of the site. Sites submitted in the SHLAA received mixed results with parts of the site found to be suitable for residential development and other parts were found unsuitable for residential uses. Impacts on the golf course located to the north of this area would need to be considered as well as biodiversity etc. Due to the sensitive location the site would be less appropriate for employment uses.	Long Term – The site is within the Green Belt and would need to be released for new B-class development. This strategic area would not be well suited to employment growth. The site scores fair overall. 
13 – Dry Street South Extension	40	Good strategic transport links and public transport links. The site is located within the Green Belt. The site is adjacent to an SSSI. No sites of any significance were submitted in the SHLAA that were west of the A176 and south of the hospital. The site is located adjacent to the Basildon University Hospital, a major non-B class employment/destination in its own right. Essex County Council with the support of Basildon BC applied for £30m DfT Pinch Point funding in 2013 to widen and upgrade Nethermayne from Hospital roundabout to Town Centre, in view of easing current congestion issues	Long Term – The site is within the Green Belt and would need to be released for new B-class development. This strategic area would not be well suited to employment growth. The site scores poor overall. 

Sites	Overall Suitability Score (%)	Comments	Scope for Change and scoring
14 - Benfleet Triangle	40	Adjacent to strategic road network, but Essex County Council advises that access into the site would not be viable.	Long term – The site is in Green Belt. Access issues mean that the site is unlikely to come forward. The site scores poor overall. 

Source: Atkins

Potential Sources B-class Employment Floorspace

8.36. The employment site desk-top analysis and the site appraisals have identified some important sources of potential supply:

- Employment Floorspace from vacant/underutilised Land in existing employment sites.
- Commercial development pipeline (see chapter 5 Paragraph 5.21).
- Town centres (Basildon and Wickford) (see chapter 5 Paragraph 5.28).
- Key employment site - Gardiners Lane South (protected under BAS E1) and Terminus Drive Pitsea (protected under BAS E2) (see chapter 5 Paragraphs 5.26 – 5.27).

Vacant / Underutilised Land in Existing Employment Sites

8.37. Within the existing employment sites there are some key vacant sites which can be developed for employment uses. It is important to identify these opportunities as these areas offer potential supply of employment land. Some 48.2 ha of vacant land in existing employment sites (that were recommended for continued protection) was identified using satellite photography and was verified on site. This is set out in Table 13 and Table 32.

8.38. It should be noted that Table 13 identified 4.4 hectares of vacant / underutilised land at sites within the Green Belt (Site 15 White Bridge Farm, Site 19 Sadlers Farm, Site 20 Blue House Farm and Site 21 Annwood Lodge). The vacant land at these sites has not been taken forward in the analysis below because the sites are in the Green Belt. These sites could provide an opportunity to meet some of the future employment needs (with the exception of Site 19 Sadlers Farm which was shown in Table 30 to be unsuitable for continued B-class employment uses). However, any development at these sites would need to take account of the Green Belt policy constraints.

8.39. The assessment of the vacant/underutilised land gives an indication of its suitability for new B class development. Basildon Borough Council would need to carry out further detailed site assessments and consult with land owners and tenants before the land can be considered as forming a component of future supply to accommodate employment needs during the period to 2031.

8.40. To assist with the interpretation of capacity, Table 32 also provides an indicative split by use class. This has been carried out to highlight the suitability of different sites for a range of business occupiers and should not be considered prescriptive.

8.41. The amount of floorspace potentially available at each site has been obtained by applying the following plot ratios:

- B1(a) (offices) – 75%;
- B2 and B1c (general industrial) – 40%; and
- B8 (Storage and Distribution) – 50%.

8.42. Table 32 below contains a summary of the additional floorspace that could potentially be made available within existing employment sites. It should be noted that Table 32 provides an indicative and not prescriptive estimate of the types and quantum of B-class uses that could be accommodated on each of the vacant/underutilised sites.

Table 32. Vacant/Underutilised Land in existing employment sites

Sites	Potential Supply	Indicative Use (%)			Potential Floorspace (sq.m)			Total Floorspace (sq.m)
	Size of Vacant/underutilised Land (ha)	B1a/b (offices)	B2 and B1c	B8	B1a/b (offices) (Based on plot ratio of 75%)	B2 and B1c (Based on plot ratio of 40%)	B8 (Based on plot ratio of 50%)	
1 Wickford Business Park	0.4	0%	0%	100%	0	0	2,000	2,000
2 Radford Way	0.3	20%	80%	0%	450	960	0	1,410
3 Burnt Mills	7.2	10%	20%	70%	5,400	5,760	25,200	36,360
4 Cranes Industrial Estate	13.5	10%	40%	50%	10,125	21,600	33,750	65,475
6 Festival Business Park	4.3	0%	0%	100%	0	0	21,500	21,500
7 Pipps Hill	6.4	0%	50%	50%	0	12,800	16,000	28,800
11 Ford Technical Centre, Dunton	16.1	30%	40%	30%	36,225	25,760	24,150	86,135
Total	**48.2**				**52,200**	**66,880**	**122,600**	**241,680**

Source: Atkins Figures in the Table have been rounded

Other Sources of B-class Employment Floorspace

8.43. It should be noted that vacant floorspace can only go a certain way in meeting the future needs for employment floorspace as there will always need to be a degree of vacant floorspace in a properly functioning market (i.e. churn), and also the requirements for new floorspace are largely for B1(a) floorspace and B8 floorspace and therefore some of the vacant employment floorspace is not appropriate to meet these needs. Future employment floorspace needs are also sensitive to the market need for quality and location of premises; a site being vacant does not automatically mean that it is suitable for a new use in its current state or form.

8.44. Table 33 sets out the potential supply of B-class employment floorspace. There is potentially 373,715 sq.m of floorspace available from the various sources of supply. The majority of this floorspace supply will be for B1a and B8 uses.

Table 33. B-class Employment Floorspace (sq.m) – Potential Supply 2011-2031

Supply	Size of Vacant/Underutilised Land Area (ha)	B1a/b (sq.m)	B2/B1c (sq.m)	B8 (sq.m)	Total (sq.m)
Commercial Development Pipeline[28]	1.1	1,431	3,746	1,873	7,050
Town centres					
Basildon	2.5	25,000	0	0	25,000
Wickford [29]	0.05	500	0	0	500
Sub Total[30]	2.6	25,500	0	0	25,500
Vacant/Underutilised Land					
1 Wickford Business Park	0.4	0	0	2,000	2,000
2 Radford Way	0.3	450	960	0	1,410
3 Burnt Mills	7.2	5,400	5,760	25,200	36,360
4 Cranes Industrial Estate	13.5	10,125	21,600	33,750	65,475
6 Festival Business Park	4.3	0	0	21,500	21,500
7 Pipps Hill	6.4	0	12,800	16,000	28,800
12 Ford Technical	16.1	36,225	25,760	24,150	86,135
Sub Total	48.2	52,200	66,880	122,600	241,680
Key Employment Site (Saved Local Plan)					
Gardiners Lane (protected under BAS E1)[31]	16.2	36,450	45,360	0	81,810
Terminus Drive Pitsea (protected under BAS E2)[32]	3.5	7,875	9,800	0	17,675
Sub Total	19.7	44,325	55,160	0	99,485
Grand Total	**71.5**	**123,456**	**125,786**	**124,473**	**373,715**

Source: Atkins Figures in the Table have been rounded.

28 Land area assumptions made for the commercial development pipeline based on plot ratios B1(a) (offices) – 75%; B2 and B1c (general industrial) – 40%; and B8 (Storage and Distribution) – 50%.

29 Wickford Masterplan identifies 1,000sq.m of mixed commercial development, of this the Consultant estimates 50% of this could be developed for office (B1a).

30 Land area assumptions made for the town centre areas are based on plot ratio B1(a) (offices) – 75%.

31 Policy BAS E1 for B1 / B2 development, the Consultant estimates 30% for office and 70% for B2 use development and estimates floorspace based on plot ratios B1(a) (offices) – 75%; B2 and B1c (general industrial) – 40%.

32 Policy BAS E2 for B1 / B2 development, the Consultant estimates 30% for office and 70% for B2 use development and estimates floorspace based on plot ratios B1(a) (offices) – 75%; B2 and B1c (general industrial) – 40%.

Demand – Supply Balance

8.45. For the market to function efficiently and to allow effectively for churn, choice and flexibility, it will always be necessary for pipeline supply to be in excess of projected levels of future demand. In simply planning for an amount of supply which matches future estimates of demand in quantitative terms, the operation of the market will be distorted which would result in a significant element of demand not being met. In allowing employment growth to materialise through new development, a surplus in supply is required to ensure that actual demand can be met in terms of location, type, timing, quality and size.

8.46. Table 34 shows the approximate B-class demand requirements (identified in chapter 7). The Baseline Scenario identifies that there is some demand for office / R& D with around 6.5 hectares and warehousing at around 15.5 hectares. There is projected to be a decline in the requirement for industrial land (B1c and B2) by some 13.8 hectares.

8.47. Under Scenario 2 (which assumes that 17,000 new homes will be delivered in the plan period 2011-2031) the additional housing growth will generate a need for 10 hectares for office and a significant demand for warehousing at some 37 hectares, and minimal demand for industrial uses.

8.48. Under Scenario 3 (which assumes that 13,800 new homes will be delivered in the plan period 2011-2031) the additional housing growth will generate a need for 9 hectares for office and a significant demand for warehousing at some 32 hectares. There is a projected decline in the requirement for industrial land by around 3 hectares.

Table 34. B-class Land Demand Requirements

B-class Land Use	Scenario 1: Baseline Scenario	Combined needs Scenario 1 + Scenario 2: Housing Growth (17,000 new homes)	Combined needs Scenario 1 + Scenario 3: Housing Growth (13,800 new homes)
Office / R&D (B1(a) / B1(b))	6.5	10	9
Industrial (B1(c) / B2)	-13.8	1	-3
Warehousing (B8)	15.5	37	32
Total	**8.2**	**47**	**38**

Source: Atkins Figures in the Table have been rounded.

8.49. Table 35 sets out the relationship between the estimated demand and supply of employment floorspace in the Borough by type of floorspace. It takes the total supply identified in Table 33 and subtracts the total demand projected in Table 34. Table 35 identifies the remaining surplus once the anticipated demand has been removed from the potential supply of new sites.

Table 35. Demand-Supply Balance (2011 – 2031)

B-class Land Use	Scenario 1: Base Scenario	Combined needs Scenario 1 + Scenario 2: Housing Growth (17,000 new homes)	Combined needs Scenario 1 + Scenario 3: Housing Growth (13,800 new homes)
Office / R&D (B1(a) / B1(b))	9.1	5.6	6.6
Industrial (B1(c) / B2)	44.9	30.1	34.1
Warehousing (B8)	9.3	-12.2	-7.2
Total	**63.3**	**24.5**	**33.5**

Source: Atkins /Experian Figures have been rounded

8.50. Under the Baseline Scenario all demand is met and there is a large surplus of industrial land (B1c/B2) at some 44.9 hectares. Both Warehousing (B8) and office (B1a) space have a surplus of around 9 hectares.

8.51. Under the Scenario 2 (assumes 17,000 new homes) there is a large surplus of industry land (B1/B2) at some 30.1 hectares. There is a large shortfall of warehousing (B8) land by some 12.2 hectares and office (B1a) space has a surplus of 5.6 hectares.

8.52. Under the Scenario 3 (assumes 13,800 new homes) there is a large surplus of industry land (B1/B2) at some 34.1 hectares. There is a large shortfall of warehousing (B8) land by some 7 hectares and office (B1a) space has a surplus of 6.6 hectares.

8.53. Although, there appears to be sufficient B-class floorspace supply to meet the employment land needs set out in the scenarios (apart from warehousing under Scenario 2 and Scenario 3), the market may dictate different levels of floorspace and phasing of development being achieved on the sites, and therefore the demand supply balance in Table 35 is indicative of what could be achieved if all the floorspace opportunities identified in Table 33 come forward.

8.54. It is important to note that the identified supply of land in Table 33 should not be relied upon as a guaranteed source of land supply for B-class development in the short-term, as some sites may represent more medium-term opportunities if they require land assembly assistance etc. Also developers are likely to bring forward sites with a different quantum and types of B-class development. Further detailed site analysis (relating to land ownership, owner aspirations etc) would be required to identify the likely time-scale of the vacant/underutilised land coming forward for development.

Office and R&D - B1a/B1b

8.55. The supply of potential opportunities identified in quantitative terms falls short of demand, which represents a 19.1% increase in employment (under the Baseline Scenario) in the B1a/B1b sector (see Table 16). Under Scenario 2 (which assumes that 17,000 new homes will be delivered in the plan period 2011-2031) when combined with the Baseline Scenario there is an approximate increase[33] of 29.2% Under Scenario 3 (which assumes that 13,800 new homes will be delivered in the plan period 2011-2031) when combined with Baseline Scenario there is an increase of 26.8% in employment in the B1a/B1b sector.

8.56. The majority of office floorspace supply would come from vacant/underutilised land identified in the existing employment sites. For some of the vacant land opportunities there may be a need for the Council to designate sites for employment use, review parts of its own asset portfolio, as well as helping to facilitate land assembly to enable development.

8.57. In terms of future potential Basildon town centre would provide a choice of locations for office based premises with good strategic transport links to London. Wickford would also provide a limited amount of new office development within its town centre.

8.58. Locationally most future office supply will be concentrated in Basildon town centre and to the north along the A127 'Enterprise Parks Corridor'. The scale of opportunities provides choice and flexibility in the range and type of locations. However, the pace at which the Borough can accommodate growth is dependent on the designation of additional land and landowners bringing forward underutilised/vacant land at the existing employment sites. The process of redevelopment and re-provision of suitable floorspace within the Town centre development proposals will also depend on the capability of the market and financial institutions to support regeneration and the redevelopment of such premises.

[33] To calculate the job percentage increase for scenarios 2 and 3 the following steps are followed: Step 1 – multiply housing scenario job numbers by 80% for Scenario 2 (jobs set out in Table 20) or 75% for Scenario 3 (jobs set out in Table 25) in order to estimate the number of jobs that are additional to the Baseline Scenario; Step 2 – add the additional jobs in the Housing Scenario to those in the Baseline Scenario (Table 16); Step 3 – calculate % change between 2012 and 2031 by comparing the combined 2031 figures (calculated in Step 2) to the 2012 Baseline Scenario figures (from Table 16).

Light Industrial and General Industrial Activities – B1c/B2

8.59. It is anticipated that industrial (B2) and light industrial (B1c) employment and associated floorspace is expected to decline over the plan period (under the Baseline Scenario), although there will be an increase in floorspace demand under the housing growth scenarios that could be absorbed by the future supply of B class employment land. The level of decline in employment is of a scale reflecting a reduction of 15.4% and 16.7% (under the Baseline Scenario) in B2 and B1c, respectively (see Table 16).

8.60. Under Scenario 2 (which assumes that 17,000 new homes will be delivered in the plan period 2011-2031) when combined with the Baseline Scenario there is an approximate increase of 1.9% for B1c employment and 0.6% for B2 employment. Under Scenario 3 (which assumes that 13,800 new homes will be delivered in the plan period 2011-2031) when combined with the Baseline Scenario there is a decrease of 2.3% in B1c employment and a decrease of 3.5% in B2 employment.

8.61. Whilst there is not a demand for new B2/B1c development (as identified in chapter 7), there will be a need to allow for the refurbishment / redevelopment of the B2/B1c industrial stock overtime to accommodate needs that would be generated under the higher growth scenarios. It is important that a surplus supply of sites is maintained to accommodate for these changes. However, some of the sites in B2 / B1c use could be developed to meet needs for other uses (such as B1a and B8).

Warehousing and Storage Uses – B8

8.62. The supply of potential opportunities identified in quantitative terms exceeds the demand, which represents a 14.6% increase in employment (under the Baseline Scenario) in the B8 sector (see Table 16). Under Scenario 2 (which assumes that 17,000 new homes will be delivered in the plan period 2011-2031) when combined with the Baseline Scenario there is an approximate increase of 34.5% and under Scenario 3 (which assumes that 13,800 new homes will be delivered in the plan period 2011-2031) when combined with the Baseline Scenario there is an increase of 29.7% in employment in the B8 sector.

8.63. Even taking into account this potential the supply of opportunities for development does not meet the future projected quantitative estimates of future demand for warehousing (B8).There are a range of key factors that need to be taken into consideration which, in practice, will have an important impact on the actual balance between future demand and supply.

8.64. The capability of the Borough to support demand for this activity is constrained by supply. The main source of supply is from vacant/underutilised land but this combined with the commercial development pipeline (valid unimplemented permissions) would not provide enough floorspace and land to meet demand in the higher growth scenarios.

8.65. For some of the vacant land opportunities there may be a need for the Council to designate sites for employment use as well as helping to facilitate land assembly to enable development. This land would also come forward for other B-class uses, including B1a office development.

8.66. Locationally most future warehouse and storage supply will be concentrated to the north of Basildon town centre along the A127 ‘Enterprise Parks Corridor’. This location benefits from excellent strategic road or public transport links, which are important for B8 uses that generally require large sites that have good strategic transport connections.

Conclusion

8.67. This chapter has identified the potential supply of B-class floorspace that could be available in the Borough up to 2031. The supply of floorspace identified comes from various sources including: existing vacant employment land in existing employment sites; unimplemented planning permissions for commercial development; and masterplan development opportunities in the town centres (Basildon and Wickford). The potential supply is equivalent to approximately 373,715 sq.m of employment floorspace and this could potentially accommodate some 11,786 jobs. The majority of this floorspace supply will be for B1a/b and B8 uses.

8.68. Chapter 7 identified the forecast demand for employment up to 2031 which included: 4,089 to 6,259 B1a/B1b jobs; -1,430 to 84 for B1(c) and B2 jobs; and 1,108 to 2,608 for B8 jobs (job total depending on whether considering the Baseline Scenario or Scenario 2 higher housing growth).

8.69. Chapter 7 identified the forecast demands for employment and land. Under the Baseline Scenario identifies that there is some demand for office / R& D (6.5 hectares) and warehousing (15.5 hectares). There is an oversupply of industrial land with an excess of some 13.8 hectares. Under Scenario 2 (17,000 new homes) there is considerable demand for office / R&D with some 10 hectares identified and a significant demand for warehousing at some 37 hectares. There is minimal land demand for industrial uses (1 hectare). Under Scenario 3 (13,800 new homes) there is considerable demand for office / R&D with a demand of 9 hectares and a significant demand for warehousing at some 32 hectares. There is an oversupply of industrial land, which amounts to around 3 hectares.

8.70. This chapter has compared the potential supply of employment floorspace with the forecast demand for employment floorspace identified in chapter 7. The assessment has shown the following:

- Office and R&D floorspace - the supply of potential opportunities identified in quantitative terms falls short of the demand. In the longer term town centres provide a choice of locations for office that are likely to appeal to SMEs. Vacant/underutilised land within existing employment sites will continue to meet the requirements of occupiers who require standalone employment premises as well as managed workspace and other types of lower cost accommodation.
- Light Industrial and General Industrial floorspace – overall the demand for floorspace is anticipated to decline. There will be a need to allow for the refurbishment / redevelopment of the B2/B1c industrial stock overtime into other B class uses.
- Warehousing and Storage – the capability to meet anticipated demand is constrained by supply. The vacant/underutilised land provides some opportunity to accommodate some new B8 development but this combined with the commercial development pipeline would not meet the level of B8 demand for the Housing Scenarios. It will be crucial to protect existing viable employment areas that are meeting or could potentially meet the future needs for B8.

8.71. Consequently, it is important not to assume that all vacant floorspace can contribute to meeting future elements of demand. It will be essential that planning policy encourages the refurbishment and/or redevelopment of unsuitable or obsolete business floorspace in the Borough.

8.72. Planned and committed supply will not always be translated into the physical provision of floorspace. In this context, it will be important to protect existing, viable employment areas and not rely on potential supply that may not reach the market place.

8.73. In planning for meeting future demand, it will be essential to ensure that supply can respond to market needs in terms of the type of premises required. The emerging employment land supply policies and associated designations should provide sufficient choice and flexibility to meet the varying needs of the market.

8.74. The supply demand balance analysis has shown that the Borough is well placed to meet many of Borough's employment needs that are anticipated over the plan period. However, should the Council decide to implement higher housing growth scenarios significant areas of new employment land would need to be allocated. Much of the supply for new office space will be dependent on the ability to deliver area wide town centre redevelopment proposals. It will also be important that the vacant/underutilised land identified within existing employment sites comes forward for development in order to provide accommodation that is flexible and affordable and meets the needs of local businesses. Despite the anticipated decline in need for light industrial and general industrial floorspace the existing employment sites will continue to play an important role in providing premises to meet the needs of existing industrial occupiers, and to provide a reservoir of employment land to meet other identified employment needs including B8 uses.

9. Recommendations

9.1. This section sets out our conclusions and recommendations for taking forward employment land policies in Basildon Borough. It also addresses the key aspects identified in the study brief including:

- The need to meet with the requirements of the NPPF based on an up to date assessment of demand and future potential for employment generating uses in the Borough with a focus on needs relating to B-class premises complementing other evidence base studies on other activities.
- The need to account for the opportunities highlighted within the Basildon Economic Development Strategy (EDS)
- A review of the Employment policy and current employment site designations
- Potential for different policy approaches inside and outside of town centres.
- A review of how the Council should assess market signals.
- A review of how the Council can deal with applications for change of use for employment use in mixed developments that have remained vacant.
- Potential economic development interventions

Summary of Forecast Needs and Portfolio of Locations and Sites Required to Meet Demand

9.2. The employment growth projections set out in chapter 7 identify potential B-class jobs growth of between 3,767 – 8,951 up to 2031 depending on the growth scenario. In the Baseline Scenario job growth is anticipated to be largely in the B1 class jobs (office based jobs), whilst B1c and B2 jobs (general industrial and manufacturing jobs) are forecast to decline. B8 jobs (storage and distribution) are forecast to increase.

9.3. For the purpose of land use planning it is important to convert the forecast jobs growth into additional floorspace needs. Given the forecast growth in jobs that will require B1a class floorspace, the demand for B1a floorspace under the Baseline Scenario is 49,062sq.m. The Baseline Scenario projects an overall decline in demand for B1c & B2 employment floorspace with a decline of -55,281sq.m. The Baseline Scenario forecasts an increase in demand for B8 floorspace of 77,575 sq.m. The housing growth scenarios would generate needs for all types of employment floorspace (in addition to the needs identified in the Baseline Scenario); most of the additional floorspace need in the housing scenarios would be for B1 and B8 employment floorspace.

9.4. In order to meet employment land requirements to 2031, the Consultants have assessed the potential for additional floorspace from various sources.

9.5. There is a current supply of vacant floorspace that is mainly concentrated in the existing employment areas. There is a significant amount of vacant floorspace in the existing employment areas and other employment areas, currently some 167,845 sq.m, this represents 12% of total floorspace. The vacant floorspace has a role to play in meeting some of the future demand, but in any market there will be a need for a level of vacancy to allow for movement of businesses to meet their needs. A normal level of vacancy in a buoyant market could be considered to be between 7-10%. Taking into account the current economic climate the 12% vacancy rate in Basildon Borough is considered to be a reasonable level. Therefore not all vacancy will be used to meet growth needs. There will also be issues with the type and quality of some units not meeting the requirements of businesses looking to move to the Borough or start up.

9.6. Another source of supply is the existing commercial development pipeline (sites that have planning permission but have not been implemented).In terms of proposed B-class use floorspace, there is around 7,000 sq.m of net floorspace in the pipeline. As such this source of floorspace does have some limited potential to meet the future floorspace needs of the Borough in quantitative terms. The developer will choose when to implement their planning permission, which will be valid for 3 years from the date of approval.

9.7. There are some short to medium term opportunities for new floorspace in the existing employment sites, where there is a total of 48.2 ha of vacant land, which could accommodate a total of 241,680 sq.m of new floorspace. Some of these identified sites cover fairly large areas of land (6-7 ha) that may represent more medium to longer term opportunities (potentially brought forward as phased development) due to the significant level of investment required.

9.8. The longer-term redevelopment and regeneration of the Borough's town centres (Basildon and Wickford in particular), offer significant potential for new office jobs, with the creation of approximately 1,466 jobs, that are mainly concentrated in Basildon town centre.

9.9. Chapter 8 has quantified the potential from each of the above sources to assess what the theoretical supply and demand balance in the Borough, might be, in terms of meeting both the floorspace and job growth forecasts. This has shown that theoretically there is sufficient floorspace either at present or planned to be developed, to meet the forecast needs identified in the Baseline Scenario for B1a floorspace needs. However if we assume that only the short-medium term supply of vacant/underutilised land came forward for development (around 6.5 hectares) there would be a shortfall in office space requirements by 0.4ha. In addition, there is also likely to be a shortfall in the amount of floorspace to meet the forecast needs for B8 floorspace and jobs.

9.10. It should be noted that the quantitative assessment reflects a level of uncertainty inherent in the job forecasts and the supply of sites needs to provide for a choice of size, quality, type and location of premises, and supply has therefore been aligned completely with demand. Providing a precise match of sites and premises is not realistic accounting for the functioning of the market and not the purpose of the exercise. However, balancing the supply and demand does allow the Council to consider what policy approaches they will need to take forward to meet the future employment needs in the Borough and to promote growth that responds to market signals.

9.11. It will be important that the Council seeks to provide enough land to meet employment land demands over the plan period. Without sufficient employment land, projected job growth will be very difficult to achieve as existing businesses within the Borough may find it difficult to meet their aspirations to expand and inward investment to the Borough may be hindered due to a lack of suitable sites. This could ultimately mean that existing businesses and those looking to locate or invest in the Borough may choose to look elsewhere for suitable sites. The Council have some ambitious housing growth projections, these new houses need to be supported by new jobs, failure to provide sufficient land to meet the projected job growth targets would impact on the number of jobs available to the existing and future residents of the Borough, and hence more residents would need to look outside the Borough for employment.

9.12. The key finding from this exercise is that the existing employment sites are providing a significant reservoir of land and floorspace for SMEs and other types of businesses that are not likely to be provided outside of these areas. If the Borough is to continue to cater for the ongoing needs of general industrial and light manufacturing businesses and to meet some of the forecast need for more B8 floorspace, the Council should continue to retain policy protection for the existing employment sites.

Policy Recommendations

9.13. The current employment area policies are important for the protection of employment land in the Borough. The evidence set out in this study shows that the existing employment areas are operating effectively and viably as employment locations (on the whole), and in particular the future supply demand balance shows that there is sound justification for the continued protection of the existing employment sites. The employment policies that are in the Local Plan are supported by this evidence and accord with the NPPF. These issues are explored further below.

Existing Employment Areas Policy

9.14. In assessing the current existing employment areas policy in the saved policies in the Local Plan we have considered the requirements of the NPPF. The NPPF makes it clear that long term protection of employment allocations where there is no prospect of them coming forward, should be avoided. However, it is also clear from the NPPF that plan making should be based on an up to date and relevant evidence base and therefore be responsive to the market signals to provide adequate provision of the right type of employment land to meet the needs of the business community.

9.15. This study provides an up to date evidence base, which the NPPF requires in support of a protective policy stance. The findings on the supply and demand for employment land show that the current employment areas are currently performing well overall (see below for detail on those that currently have higher levels of vacancy) with a level of vacancy that considering the current economic situation is consistent with market conditions and maintaining a level of ‘churn’ which any functional market will require. Findings from the study also show that the current employment areas also generally provide a reasonable quality of premises that are meeting the needs of existing users. Chapter 7 has shown that there are significant forecast employment land needs that would be generated up to 2031 under the Baseline Scenario. The existing employment areas will be required to meet some of this demand and to maintain a balanced employment market in Basildon Borough. Existing employment areas provide an important contribution to meeting demand in key sectors which are competitively located in Basildon Borough. These activities demonstrate the role of Basildon Borough in the Essex economy and include many of the features of the comparative advantages of operating an industrial or warehousing activity in Essex. Many of these activities:

- Serve Essex markets;
- Are near the end of the physical production process;
- Produce time-sensitive goods and services; and
- Are high-productivity and high-value.

9.16. Existing employment areas also contributes to local economic diversity by providing:

- Clusters of economic activity which support a significant amount of existing employment;
- A strategic location that is in good proximity to the road network and local residential communities;
- An existing role or offers potential with regard to the provision of premises serving SMEs (including start-up, expanding and relocation businesses); and
- Lower cost accommodation suitable for small, start-up or lower value industrial, warehousing and supplementary office uses that are important to the local economy.

9.17. This provides a justification for retaining a supply of locally significant employment land to meet the existing and future needs for employment in the Borough, and therefore for the above reasons, we recommend retaining the existing employment area policy.

Existing Policies

9.18. A review of the Saved Policies in the Local Plan has however identified a number of potential improvements to the existing general policies[34] as follows:

BAS E4 – Existing Employment Areas

9.19. The policy could be strengthened to ensure the greater protection of existing employment areas. The criteria in the policy could be strengthened as permitting a change of use on the demonstration that ‘there is adequate land and premises’ available elsewhere in the Borough and on the basis that this would not result in a ‘significant net loss of employment’ are broad terms. Developers could put forward the case that there is ‘adequate land and premises’ on the basis that there are a number of employment land allocations that are undeveloped. Similarly, a ‘significant’ loss of employment could result in the actual net loss of B class employment, as whilst the change of use could result in the provision of a similar level of employment it may not be B-class employment.

BAS E6 – Untidy Industry

9.20. Policy BAS E6 identifies that Harvey Road and Archers Field are areas where the development or expansion of untidy industry sites will be permitted. It is recommended that this policy is retained in order that the Council can continue to control the location of these potentially environmentally harmful industries.

[34] The Saved policies in the Local Plan policies have already been reviewed in chapter 5.

BAS E7 – Alternative Uses of Industrial Premises

9.21. The policy could be strengthened to ensure the greater protection of existing employment areas. The criteria in the policy could be strengthened as permitting a change of use to retail on the basis that it does not ‘cause material harm to the vitality and viability of any town centre’ or result in a ‘significant net loss of employment’ are loose terms. This policy does not provide enough protection, as we have seen in the Borough there are examples where existing employment areas have been developed as car showrooms, car wash facilities, food/drink uses and trade centre (e.g. non-B class uses located along Miles Gray Road in Site 7 Pipps Hill). Such retail development impacts on the existing employment areas by reducing the size of existing employment clusters that are important for attracting new occupiers. Similarly out-of-town retail parks and big box retail will negatively impact on the vitality of town centres and are less sustainable due to reliance on car use.

BAS SH6 – Retailing on Industrial Estates

9.22. This policy could be strengthened to ensure that industrial estates are not slowly turned into out of centre retail parks. This is important not only for the retention of employment land, but also to ensure the vitality and viability of town centres. However it is recognised that in some cases bulky retail or trade counters may require an out of centre location. The policy as it stands proposes criteria that require that there is no significant net loss of employment; this criterion should be amended to require no net loss of employment. The Council may also seek to set a maximum limit as to how much retail floorspace would be allowed in industrial areas so as not to undermine town centres and to ensure that the predominant use of industrial areas is for B-class employment uses. This could be expressed as an amount of floorspace or as a percentage of total floorspace in the employment area. The consultants do not recommend any particular maximum as the scope of this study has not included considering the existing extent of retail floorspace in industrial areas.

BAS TC1 – District Wide Town Centre and BAS E10 – General Employment Policy

9.23. Policies BAS TC1 that identifies town centre appropriate development and BAS E10 which identifies development criteria for industrial, business and office development proposals are considered to be sufficient and should continue to be retained.

Recommended New Policies

Conversion Policy Criteria

9.24. A new policy should be developed that sets out criteria for the conversion of B-class employment floorspace into other uses. Criteria should include marketing evidence that shows that a site is not viable for continued B-class employment use. The criteria would provide an important test that helps to ensure that employment premises have been available for re-occupation over a reasonable time period. All markets operate with a level of ‘churn’ in properties, this is inevitable as premises do become vacant from time to time as occupiers either move premises to expand or meet other needs or they cease to operate, this is important to the market and the policy approach needs to reflect this. Without the criteria there is a strong possibility that premises (that become vacant) could be converted or redeveloped for other uses without having been given sufficient time to be reoccupied.

9.25. In considering what is a reasonable level of time for a property to be marketed before it could be argued that there is no evidence of demand, 2 years is considered an appropriate level of time. As this allows a sufficient time for a period to account for the churn in a market, and also provides sufficient time for recovery in the economic cycle to account for where vacancy has occurred due to a period of contraction in the economy. For the above reasons the consultants recommend a marketing criteria with a period of at least 2 years.

9.26. It should be noted that the Government’s changes to Permitted Development Rights will impact on the Council’s ability to prevent conversion of offices (B1a) to residential. The Council had the opportunity to seek an exemption to the permitted development rights, during the Government’s consultation on the amendments but did not seek an exemption. However, where conversion of offices to residential would require external alterations to the building planning permission will still be required, and therefore policy should set out when conversion would be appropriate.

9.27. When the new permitted development rights come into force the Council could seek to issue Article 4 directions to remove these permitted development rights in a particular area. However, the Article 4 directions require the approval of the Secretary of State. Given that it is the Government's intention to remove Permitted Development rights for office to residential conversions (and local planning authorities were given the opportunity to apply for an exemption), the consultants anticipate that the Secretary of State may challenge any Councils that choose to take this course of action.

9.28. The Council would also need to consider the case for Article 4 directions carefully as it should also be noted that the Council may be required to pay compensation in circumstances where someone cannot obtain planning permission for development which otherwise would be treated as permitted development.

Directing Development Policy

A new policy or a series of policies (relating to specific uses e.g. office, industrial) should be developed that specifies appropriate locations where new B-class development should be located. For example, stating that offices uses should be encouraged within town centres would support town centre regeneration and would help to direct offices to the most appropriate location.

Existing Employment Areas Designations

9.29. The Saved policies in the Local Plan sets out which of these sites have been designated as part of the Borough's Strategic supply of employment land as follows:

- 9 sites are identified as Existing Employment Areas
- 1 site is identified as Ford Research and Development Area
- 3 town centres are identified as Basildon, Billericay and Wickford

9.30. Having assessed the 24 employment sites (including the three main town centres - Basildon, Billericay and Wickford) the consultants recommend the following approaches:

- Removal of existing employment area boundary.
- Amendments to existing employment area boundary, both extending and reducing the boundaries.
- Retaining the existing employment area designation.
- Protection of undesignated employment site.

9.31. The Consultants recommend that the existing employment area designation should be removed from the existing designated employment areas:

- Land North of Courtauld Road (protected under BAS E3) has not been brought forward for 1.5 ha of B1 use development. There are known viability issues with this site which stem from a stipulation by the Highways Authority that the site is not accessible from Courtauld Road and access must be taken through the Rose Garden Centre via Nevendon Road if it was to be developed. The site is likely to come forward for residential as HGV access on this part of Nevendon Road is unsuitable.

9.32. The Consultants recommend that the boundaries of the following existing employment areas are amended:

- Site 3 Burnt Mills - The existing allocation boundary should be amended to include the Tree Nursery (No.8) vacant parcel between residential area and Lords Way. The boundary should also be amended to include the Lords Court Business Park. The Sewage Treatment Works and Waste Allocation should also be removed from the designation as these are classified as non B-class uses. The Untidy Industrial area should continue to be protected (Policy BAS E6).
- Site 4 Cranes Industrial Estate - The site boundary should be extended to the A127 to include the strip of land (allocated as existing open space) covering 6.1ha. The existing employment site should continue to be protected for B-class employment uses.

- Site 7 Pipps Hill - The employment site boundary should be amended to exclude the Pipps Hill Retail Park that is located to the east of the A176. The site boundary should be extended to the A127 to include the strip of land (allocated as existing open space) and the adjacent garage and scrap yard.
- Site 9 Laindon North - The site boundary should be amended to exclude the BP Petrol Filling Station on the A127/High Road junction. The southern boundary should be extended to include all of the B-class premises as opposed to just the part of the buildings.
- Site 11 Ford Technical Centre - The boundary to the east needs to be amended as it has been granted consent (subject to s.106) for housing. See application for boundaries Dunton North search for application 12/00951/FULL. On the western site boundary the car showroom should be excluded as this is a non B-class use. The existing employment site should continue to be protected for B-class employment uses under the existing Automotive Research and Development policy (BAS E5).
- Site 12 Southfields - The car showroom in the north-west corner of the site boundary (and to the north of the B148) should be excluded as it is a non-B-class uses. The existing employment site should continue to be protected for B-class employment uses.
- Site 2 Radford Way - The boundary should be amended to include the surface car park. The existing employment site should continue to be protected for B-class employment uses.

9.33. The Consultants recommend retaining all other existing employment areas designations in their current form. This recommendation is in line with the results of the site assessments of the existing employment areas (see chapter 6) and the future employment needs set out in chapter 7.

9.34. The Consultants recommend that the following employment areas (that are not located in the Green Belt and post dated the adoption of the Local Plan in 1998) are protected for B-class employment uses:

- Site 6 – Festival Business Park. This site is not protected as an employment area, as the Local Plan Policy E11 relating to 'Large Industrial/Recreation Sites with Planning Permission (April 1996) was not saved. The site boundary should be amended to exclude the Festival Leisure Park that accommodates leisure and entertainment uses and the David Lloyd complex.
- Site 8 – IFDS The employment site is not protected as an existing employment area. The existing employment site should continue to be protected for B-class employment uses.

9.35. The Consultants identified whether there were any significant clusters of employment premises that were outside existing employment areas or other designated areas such as the town centres. By assessing Valuation Office Agency data it was evident that there were no significant clusters of premises identified outside of the existing employment areas and town centres.

Assessing Market Signals

9.36. The NPPF requires local authorities to be responsive to market signals to ensure that there is adequate provision of the right type of employment land to meet the needs of the business communities. This study represents part of the evidence base to identify what the market requires in terms of employment land needs. The Consultants recommend that in order to respond to market signals the Council should do the following:

- Undertake regular reviews of the employment land every 3-5 years as appropriate
- Undertake surveys of businesses to understand local businesses needs and aspirations this will require an appropriate sample size and will need to explore aspirations for growth / expansion, perceptions of the suitability of the location, type, size and quality of the premises. The business survey should be undertaken alongside the employment land review.
- Continue to carry out and monitor existing employment areas by carrying out regular surveys of the existing employment areas (every two years) which provides useful information on the quantity of B-class floorspace and considers issues of suitability of the existing employment areas and quality of the premises

- Consult regularly with local property agents to gain perspectives of local market conditions.

Development Threshold Trigging Demand Impact Assessment

9.37. The protection of commercial office floorspace within town centres is important for maintaining the viability and viability of town centres. Office uses contribute to the mix of uses within the town centres and promote broader consumer activity within these centres. The NPPF identifies under paragraph 26 that a demand impact assessment will be required for new office development outside of town centres that exceeds a locally set threshold.

9.38. When assessing applications for new B1a class development outside of existing town centres, Basildon Borough Council should require an impact assessment if the development is over a proportionate, locally set floorspace threshold of 1,000 sq.m. This should include the impact of the proposal on the existing, committed and planned public investment in the key existing employment areas and the impact of the proposal on town centre vitality and viability.

9.39. Average office premises (B1a) are the largest at 359 sq.m, followed by industrial (B1c/B2) (321 sq.m) and warehousing (B8) (200 sq.m). A threshold of 1,000 sq.m would therefore be appropriate as this would be for a development typically 3 – 4 times the average size of premises within the Borough.

Impacts of Major Development Schemes in Thurrock

9.40. DP World and Tilbury Port provide a good supply of larger industrial premises that Basildon Borough will need to compete with to attract new investment.

9.41. The business survey identified that indigenous businesses in Basildon are not intending to relocate. However, when considering future growth it is evident that DP World and Tilbury Port will provide an attractive draw for new investment. DP World will provide around 883,000 sq.m of B class employment floorspace and Tilbury Port will provide around 86,500sq.m of commercial development for business, industrial, storage and distribution uses.

9.42. Thurrock have identified sufficient available employment land supply to meet projected demand throughout the planning period, however this demand did not take into account development at London Gateway Port.[35] If all the sites come forward there would be an oversupply of employment land in the Borough, which may draw in more demand from other neighbouring boroughs. The complete understanding of the impact of these schemes on Basildon Borough will not be fully understood and quantifiable until it is in full operation.

HCA Land Development and Disposal

9.43. The HCA is one of the principle land owners in the Borough, and will be crucial to helping deliver many of the key development opportunity sites that are identified in this study. The employment land needs identified in the study are over a 20 year period so the Council should work with the HCA to achieve their ambitions for their local plan by getting HCA to bring sites to market. HCA aim to deliver and support economic growth by making sure that land is disposed of to support local plans and ambitions and ensure that land is transferred to end users as quickly as possible.[36]

Monitoring

9.44. This study has provided further evidence that can be used in support of the Borough's employment land policies; this will need to be updated on a periodic basis to ensure that the Council is responding appropriately to market signals.

9.45. The Council should carry out regular surveys of the existing employment areas (every 3-5 years) which provides useful information on the quantity of B-class floorspace and considers issues of suitability of the existing employment areas and quality of the premises. Where possible vacant

[35] Thurrock Council, Employment Land Review Update, 2012

[36] Homes and Communities Agency (HCA), Land development and disposal plan

floorspace in existing employment areas should be mapped (to assist with tracking of vacancy over time), and any new vacant land parcels should be identified so that the Council might take a more proactive approach in bringing forward employment development, either through the preparation of planning briefs, and or through identifying and working with land owners to assess potential issues with bringing forward land for employment uses.

9.46. The Council should ensure that the information collected is shared widely within the Council in particular with those officers that are responsible for economic development. This would help the Council develop a more proactive approach to planning for employment land and supporting economic development. The primary indicators to monitor the performance of the Borough's employment policies include:

- Vacant units and land – this indicates how the current supply of premises is matching the requirements of businesses[37].
- New Jobs by sector identifies which sectors are growing/declining, which will have implications for premises requirements.
- Commercial development pipeline (Annual Monitoring Report) identifies the supply and type of new B class development coming forward and how much B class floorspace is will be lost.

[37] The EGI data can be purchased to identify actively marketed vacant units

Appendix A. Appendices Site Proforma & Guidelines

Basildon Borough Council Employment Study Site Survey Proforma

Site Information

Q1. Unique ID No	
Q2. Site Name	
Q3. Date of Survey	

Location and Accessibility:

Q4a. Address	
Q4b. Sub Areas	
Q4c. Ward	

Q5. Site Type

Employment Land Allocation	
Existing Employment Site	
Unallocated Site	
Rural Employment Location	

Existing Use and Property Appraisal:

Q6a. Size of Site (ha)		
Q6b. Vacant/Derelict Employment Land	**ha**	**%**
Q6c. Actively Marketed		

Q7a. Total Number of Employment Premises	
Q7b. Number of Vacant Employment Premises	
Q7c. Vacant Employment Floorspace (sq.m)	

Q8. Details of Vacant/Under-utilised Land and Floorspace (not marketing data for vacant premises or sites).	

Q9. Premises Typology (Occupied Sites)

	Balance of uses (%) ha		**Quality (%)** – (row to add to 100%)			**% Premises Developed in last 5 yrs** (to nearest 5%)
	Balance of uses (%) ha	**ha**	**Good**	**Fair**	**Poor**	
Established or potential Office Locations						
High Quality Business Parks/R and D						
Warehouse/Distribution/ Wholesale						
General Industrial Areas						
Incubator/SME Sites						
Sites for specific occupiers						
Recycling/Environmental (inc aggregates)						
Retail						
Farm based employment						
Total	**100%**					

Q10. Summary of Existing Role including Property Appraisal	

Q11. Opportunities for Change	

Environmental Appraisal / Identification of development constraints:

Q12. Adjacent Land Uses and Mix of uses within Site	

Q12a. Does the sites or adjacent land have an ecology / biodiversity or nature conservation constraints	

Description of other Development Constraints and Environmental Problems

13a. Potential to Support 24 hour working	
13b. Introduction of non-B-class Uses May Compromise the Effective Operation of the Site	
13c. Existing Operations Incompatible with Sensitive Neighbouring Land Uses	
13d. Floodplain Constraints	

Q14. Quality of Site Environment, Image and Attractiveness (including landscaping, boundary treatments, screening and sitting out areas)	

Access and Transport:

Q15a. Description of other Development Constraints and Environmental Problems

Strategic Road Network	
Primary Road	
Secondary Road	
Local Distributor Road	
Local Street	

Q15b. Comment on distance/connection to the strategic road network in terms of proximity, quality of the linkage and adequacy for current/potential use.	

Q16. Parking Restrictions

Dedicated parking areas/car park	
On Street Parking	
Yellow/double yellow lines	
Controlled parking zone/paid parking	

Q17. Public Transport Accessibility

Train Station	On Site	
	Within 400m	
	Within 800m	
Bus Stop	On Site	
	Within 400m	
	Within 800m	

Adequacy of Internal Access Servicing and Parking

Q18a Comment on parking problems/issues, problems relating to unloading/servicing, adequate internal circulation, street lighting etc.	

Q18b Evidence of Parking Difficulties Relating to Employment Use	
Q18c Access / Servicing inadequate for Existing Occupier(s)	

Management / Amenities:

Q19. Provision of amenities/facilities	

Q20. Other Issues Affecting the Marketability/ Management of the Site (e.g. Evidence of marketing, single / multiple ownership)	

Basildon Borough Council Employment Study – Site Survey Pro-Forma Guidelines

Guidance	
Q No.	**Site Information**
1	Unique site ID based upon Atkins site list.
2	Site Name.
3	Date of Survey.
	Location and Accessibility
4a **4b** **4c**	Site address. Identify the sub area within which the site is located. Ward where the site is located. If the site goes across more than one ward choose the main ward in which the site is situated (desk based exercise)
5	Tick appropriate designations which apply to the site.
	Existing Use and Property Appraisal
6a **6b** **6c**	Size of site - Based upon digitised boundaries. Check / amend site boundaries if different from existing digitised boundaries or if employment element only forms part of site (GIS). Identify amount of vacant/derelict land on site and mark on plan if appropriate: GIS to calculate %....derelict land includes buildings which are clearly abandoned, severely dilapidated or unusable. This category should not include vacant/ empty premises with potential for re-occupation. Is there evidence that any vacant elements of the site are being marketed for sale or rent (e.g. advertising boards)?
7a **7b** **7c**	Count the number of premises within the site (count a multi-occupier single building as one premises). Count the number of vacant premises Mark vacant premises on plan and note no. of storeys.
8	Describe vacant and underutilised land and premises. Identify other uses occupying the remainder of the site (i.e. car parking, outside storage, derelict out building) and the proportion of the site they occupy.

	Comment if the site is underutilised by the existing user. Vacant buildings, large un-used areas etc. Where there are vacant premises (or land) note down marketing details (what site / premises are marketed for, size, agents details including phone number etc).
9	**Premises Typology (Occupied Sites)** **Types of premises represented on site** Identify the types of premises within the Employment Area/Site (The total of the first column should add to 100%). GIS will calculate hectares taking account of vacant/derelict land. • **Established or Potential Office Locations.** Sites and premises, predominately in or on the edge of town and city centres, already recognised by the market as being capable of supporting pure office (or high technology R&D/business uses). • **High Quality Business Parks / R&D**. These are likely to be sites, no less than 5ha but more often 20ha or more, already occupied by national or multi-national firms or likely to attract those occupiers. Key **characteristics** are quality of buildings and public realm and access to main transport networks. Likely to have significant pure office, high office content manufacturing and R&D facilities. Includes 'Strategic' inward investment sites. • **Warehouse/Distribution/Wholesale.** Large, often edge / out of town serviced sites located at key transport interchanges. Typically B8 occupiers. • **General Industrial/ Business Areas.** Coherent areas of land which are, in terms of environment, road access, location, parking and operating conditions, well suited for retention in industrial use. Often older, more established areas of land and buildings, a mix of ages, qualities and site/building size. • **Incubator/SME Cluster Sites**. Generally modern, purpose built, serviced units for business start-ups and small enterprises. Includes innovation centres. • **Sites for specific Occupiers**. Sites which have one premises or business activity present. • **Recycling/Environmental (including aggregates)**. Certain users require significant external storage. Many of these uses e.g. waste recycling plants can, if in modern premises and plant, occupy sites which are otherwise suitable for modern light industry and offices. There are issues of market and resident perceptions of these users. Some sites because of their environment (e.g. proximity to heavy industry, sewage treatment works etc) may not be marketable for high quality employment uses. • **Retail**. Uses defined within the 'A' classes of the Use Class Order, including 'big shed' style warehouse units. • **Farm Based Employment**. B use class premises that are based in former farm buildings / on farms.

	Condition of Premises (Quality) A visual assessment of the overall maintenance/upkeep of the premises including any evidence of dilapidation and suitability for continued use (e.g. floor to ceiling heights, building configuration/adaptability). Identify the % of buildings within each category where appropriate (row to add to 100%). • **Good** - All buildings in excellent or good condition/upkeep. Well maintained/managed and no obvious problems. Possible evidence of some lack of maintenance/upkeep (holes in fence, peeling paint). High probability if existing occupier vacates - possibly minor works required. • **Fair** - Buildings adequate for existing user adequately maintained no visual evidence of major dilapidation. Reasonable probability of re-occupation if existing occupier vacates - possibly minor works required. • **Poor** - Significant dilapidation of buildings. Possible structural problems including cracks in external walls, leaking roofs, damp, broken windows. Limited building lifespan without major repairs/renovation. **% premises developed in the last 5 years** Identify to the nearest 5% the % of premises developed within the last 5 years.
10	This should provide a summary of questions 6-9 relating to the existing premises. The summary should help inform an assessment of future use. The description could mention non-conforming land uses, the no. of storeys of the main buildings and type of premises, the extent to which the site is used for production/manufacturing, storage, offices and the role the site performs in terms of the size of occupiers and their economic role/sector. The appraisal should also indicate whether the existing activity/use is likely to continue in the short-medium term or whether there is potential for change.
11	**Assessment of Future Potential.** The purpose of this part of the survey is to make an initial assessment of the potential scope for change for all sites. The assessment should take into account land-use, planning and occupier considerations. The assessment should reflect the composite findings of the site survey (Q6-23) having particular regard to current and potential utilisation levels, employment vibrancy, vacancy levels, quality of the site for business purposes etc. • **Short Term**: Potential for type of employment growth selected to be accommodated on the site in the short term (1-3 years). Site is likely to require ground works or demolition/clearing of existing building, but does not have any other planning or physical infrastructure restrictions. • **Medium Term**: Potential for type of employment growth selected to be accommodated on the site following relatively minor alterations to the surrounding environment, physical infrastructure or land ownership and planning issues. Issues with site could typically be rectified in 3 to 5 years.

	• **Longer Term**: Potential for type of employment growth selected to be accommodated on site following major infrastructure development or the resolution of planning, land ownership or other issues. Issues not likely to be resolved in over 5 years.
	Environmental Appraisal / Identification of development constraint
12	Describe each of the surrounding land uses. Describe the mix of employment and non employment uses within the site.
12a	Note any Ecological constraints on the site and or adjacent areas. Desk based review of constraints.
13a **13b** **13c** **13d** **13e**	Consider the compatibility of the existing pattern of uses. Identify any potential environmental conflicts with adjacent properties relating to traffic, parking problems, noise, visual impact/screening, emissions etc. Identify if there is potential to support 24 working (tick box). Identify whether the introduction of non-B-class uses may compromise the effective operation of the site (tick box). Identify whether existing operations are incompatible with sensitive neighbouring land uses (tick box). Identify if there are any flood plain constraints (desk-top exercise)
14	**Quality of the site environment, image and attractiveness**: Consider the extent to which the environment of the site/adjoining areas meets the needs of existing occupiers and where appropriate the type of potential occupier types who could potentially be attracted to the site. Comment on issues such as overall image, visibility, relationship with adjoining land uses, location, and the attractiveness of the estate and surrounding environment in terms of appeal to occupiers and investors. Note quality of the entrances/approaches, the quality of the boundary treatment, signage, landscaping and amenity issues, the character of the estate/site and surrounding area and security issues. Where there is potential to improve the attractiveness of the site through investment, identify the nature of environmental improvements and provide an assessment of whether such improvements would assist in enabling change.
	Access and Transport
15a **15b**	**Road Access**: Tick type according to road hierarchy Comment on distance/connection to the strategic road network in terms of proximity, quality of the linkage and adequacy for current/potential use.
16	**Parking Restrictions:** (tick as appropriate).
17	**Public Transport Access:** (tick as appropriate).

18a	**Internal Access, Servicing and Parking**: Describe parking problems / issues (e.g. cars parked up kerbs, double parking). Consider whether there are any problems relating to unloading/servicing. Where relevant comment on internal circulation arrangements including surface, width and adequacy. Indicate whether street lighting is provided. Also, identify any significant problems which may influence the attractiveness/suitability of the site (e.g. HGV movements through residential areas, poor junction between site and public highway, traffic calming measures).
18b	• Evidence of parking difficulties (tick box)
18c	• Access / Servicing inadequate for existing occupier(s) (tick box)
	Management / Amenities
19	Description of any on-site facilities e.g. childcare provision, sitting out areas, catering/food drink, banks, other services which are available on site or within walking distance.
20	**Identify issues affecting the marketability of the site:** This may include the following: • Ownership and leasing constraints and opportunities • Property cycle, marketing and rental issues (Record agent details where premises are vacant) • Image and environment

Appendix B. Socio-Economic Assessment

Introduction

B.1.1. This section provides a profile of the prevailing socio-economic conditions in Basildon Borough. It aims to provide the economic context which shapes employment land demand and supply factors in the local authority. It provides an important input to understanding economic demand / need in the study area, within the context of the wider regional and national economies. Although regional plans have been abolished, the East of England has been used as a regional benchmark for economic impact as it influenced historic policy.

Economic Performance

B.1.2. Table B.1 examines the total level of Gross Value Added[38] (GVA) and GVA per head in England the East of England and Essex County Council (cc). Essex cc encompasses twelve local authorities within Essex. From 1997 to 2010 the GVA of Essex grew slightly above trend when compared against England and the East of England, averaging 4.9% growth per annum between 1997 and 2010 compared to 4.4% each in England and the East of England (1997-2010). It is likely growth figures for all of these areas have subsequently declined as a consequence of the recession starting in 2008. Similarly per capita GVA has grown slightly above trend when compared against England and the East of England, at 4.1% per annum compared to 3.6% in the East of England and 3.9% for England as a whole (1997-2010). Essex cc currently ranks 7th out of the local authorities that make up the East of England in terms of GVA per capita.

B.1.3. The Office for National Statistics (ONS) has not published GVA data post 2009 for Essex therefore it is not currently possible to evaluate the recovery from the recession on GVA figures post 2009. However, the East of England provides some indication of GVA recovery in the region post 2009 with a growth of 3.6% in 2010 after a fall by 3.1 per cent in 2009 (England down by 1.6 per cent). Forecasts suggest that the region will grow faster than the UK after 2010[39], peaking at 3.9 per cent GVA growth in 2013 (compared to 3.6 per cent in the UK). It is projected that it will take until 2012 for GVA to recover to 2008 levels (data not available yet).

Table B.1 - Gross Value Added (at current basic prices): Total (£m)

Total GVA	1997	1999	2001	2003	2005	2007	2009	2010	Ave annual % growth
England	622,531	696,458	764,440	858,523	942,583	1,055,306	1,061,973	1,095,580	4.4%
East of England	63,463	71,016	78,223	88,191	98,154	109,231	106,888	110,783	4.4%
Essex cc	13,200	14,743	16,445	19,149	21,341	23,824	23,372	-	4.9%
GVA Per Capita	**1997**	**1999**	**2001**	**2003**	**2005**	**2007**	**2009**	**2010**	**Ave annual % growth**
England	12,792	14,204	15,459	17,218	18,678	20,649	20,498	20,974	3.9%
East of England	12,049	13,302	14,485	16,127	17,682	19,337	18,536	18,996	3.6%
Essex cc	10,326	11,384	12,529	14,433	15,847	17,391	16,707	-	4.1%

Source: Headline Gross Value Added, ONS.
N.B average annual growth for England and East of England is for the period 1997-2010, whilst average for Essex is 1997-2009, as there are currently no GVA figures for Essex beyond 2009.

B.1.4. Table B.2 details the level of GVA within Essex CC by general sector (no data for Essex is available post 2009). The table shows that *finance; business services, public administration, education, health and construction are the drivers of growth in Essex*. Other sectors have similarly

[38] GVA measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom. GVA is used in the estimation of Gross Domestic Product (GDP). GVA + taxes on products - subsidies on products = GDP

[39] East of England Recession Impact Report (September 2009)

have seen growth, while the *agriculture*, *forestry* and *fishing* sector has seen GVA decline over the period at an average rate of 0.9% per annum, although this masks an upturn since bottoming out at £213million in 2005.

Table B.2 Essex CC Gross Value Added (at current basic prices): by General Activity (£)

Sector	1997	1999	2001	2003	2005	2007	2008	2009	Ave annual % growth
Agriculture, forestry and fishing	274	236	217	268	213	259	278	246	-0.9%
Production	2,848	2,811	2,771	2,855	3,007	3,197	3,121	3,043	0.6%
Construction	1,255	1,489	1,820	2,186	2,440	2,842	2,901	2,611	6.3%
Distribution; transport; accommodation and food	2,840	3,331	3,729	4,175	4,675	5,466	5,524	5,375	5.5%
Information and communication	475	700	855	981	1,074	1,039	977	884	5.3%
Financial and insurance activities	799	799	844	1,250	1,327	1,592	1,790	1,912	7.5%
Real estate activities	1,053	1,282	1,549	2,002	2,148	2,192	2,089	1,714	4.1%
Business service activities	1,278	1,481	1,776	2,055	2,328	2,575	2,598	2,553	5.9%
Public administration; education; health	1,984	2,148	2,377	2,817	3,477	3,971	4,148	4,323	6.7%
Other services and household activities	395	466	509	560	653	691	699	709	5.0%
Essex CC Total	**13,200**	**14,743**	**16,445**	**19,149**	**21,341**	**23,824**	**24,124**	**23,372**	**4.9%**

Source: Headline Gross Value Added, ONS

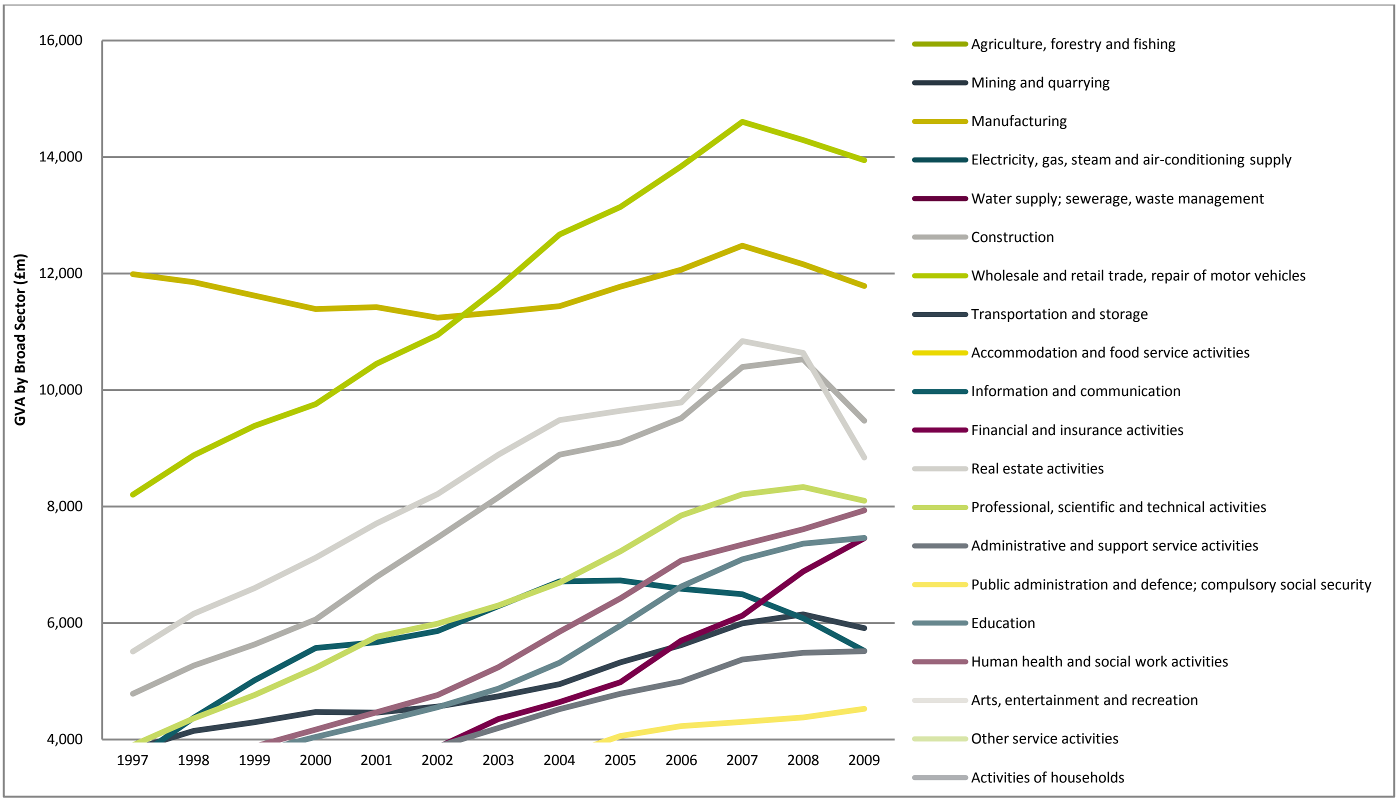
B.1.5. Table B.3 shows more detail, separating out all of the broad sectors. This information is only available at the regional level. It demonstrates how the service-related sectors have become increasingly valuable to the East of England's economy. In particular, the *finance and insurance activities sector, information and communication*, *real estate activities* and *professional, scientific and technical* and *administrative and support service activities* and currently provides a third of the total added value, up from 29% in 1997. *Public administration*, *education, health* and *other service industries* experienced average annual growth of 6.3% between 1997 and 2009. The value of output from the *construction and distribution sectors* has increased between 1997 and 2009 with slight growth in relation to other sectors. However, *manufacturing* has seen a decline in the region. These trends clearly show the structural changes that have been occurring in the East of England (as they have been nationally); with service-based sectors acting as the principal drivers of growth.

Table B.3 East of England GVA by Broad Sector (£m)

Broad Sector	1997		2002		2007		2009		Ave annual % growth
	Level	% of Total	Level	% of Total	Level	% of Total	Level	% of Total	
Agriculture, forestry and fishing	1,424	2.2%	1,279	1.5%	1,331	1.2%	1,251	1.2%	-1.1%
Mining and quarrying	276	0.4%	209	0.3%	187	0.2%	186	0.2%	-3.2%
Manufacturing	11,987	18.9%	11,241	13.6%	12,475	11.4%	11,782	11.0%	-0.1%
Electricity, gas, steam and air-conditioning supply	1,050	1.7%	1,012	1.2%	1,024	0.9%	1,098	1.0%	0.4%
Water supply; sewerage, waste management	557	0.9%	810	1.0%	1,283	1.2%	1,378	1.3%	7.8%
Construction	4,781	7.5%	7,466	9.0%	10,396	9.5%	9,470	8.9%	5.9%
Wholesale and retail trade, repair of motor vehicles	8,200	12.9%	10,943	13.2%	14,606	13.4%	13,945	13.0%	4.5%
Transportation and storage	3,826	6.0%	4,565	5.5%	5,994	5.5%	5,908	5.5%	3.7%
Accommodation and food service activities	1,574	2.5%	2,292	2.8%	2,846	2.6%	3,037	2.8%	5.6%
Information and communication	3,641	5.7%	5,859	7.1%	6,495	5.9%	5,522	5.2%	3.5%
Financial and insurance activities	3,353	5.3%	3,863	4.7%	6,123	5.6%	7,452	7.0%	6.9%
Real estate activities	5,511	8.7%	8,213	9.9%	10,838	9.9%	8,841	8.3%	4.0%
Professional, scientific and technical activities	3,901	6.1%	5,989	7.3%	8,206	7.5%	8,098	7.6%	6.3%
Administrative and support service activities	2,386	3.8%	3,877	4.7%	5,369	4.9%	5,515	5.2%	7.2%
Public administration and defence; compulsory social security	2,444	3.9%	3,042	3.7%	4,302	3.9%	4,526	4.2%	5.3%
Education	3,316	5.2%	4,555	5.5%	7,093	6.5%	7,460	7.0%	7.0%
Human health and social work activities	3,455	5.4%	4,760	5.8%	7,346	6.7%	7,934	7.4%	7.2%
Arts, entertainment and recreation	718	1.1%	1,118	1.4%	1,458	1.3%	1,483	1.4%	6.2%
Other service activities	777	1.2%	1,093	1.3%	1,379	1.3%	1,454	1.4%	5.4%
Activities of households	283	0.4%	419	0.5%	480	0.4%	549	0.5%	5.7%
East of England Total	**63,463**	**100.0%**	**82,603**	**100.0%**	**109,231**	**100.0%**	**106,888**	**100%**	4.4%

Source: Headline Gross Value Added, ONS

Figure B.1 – East of England GVA by Major Sector (£m) Between 1997 to 2009



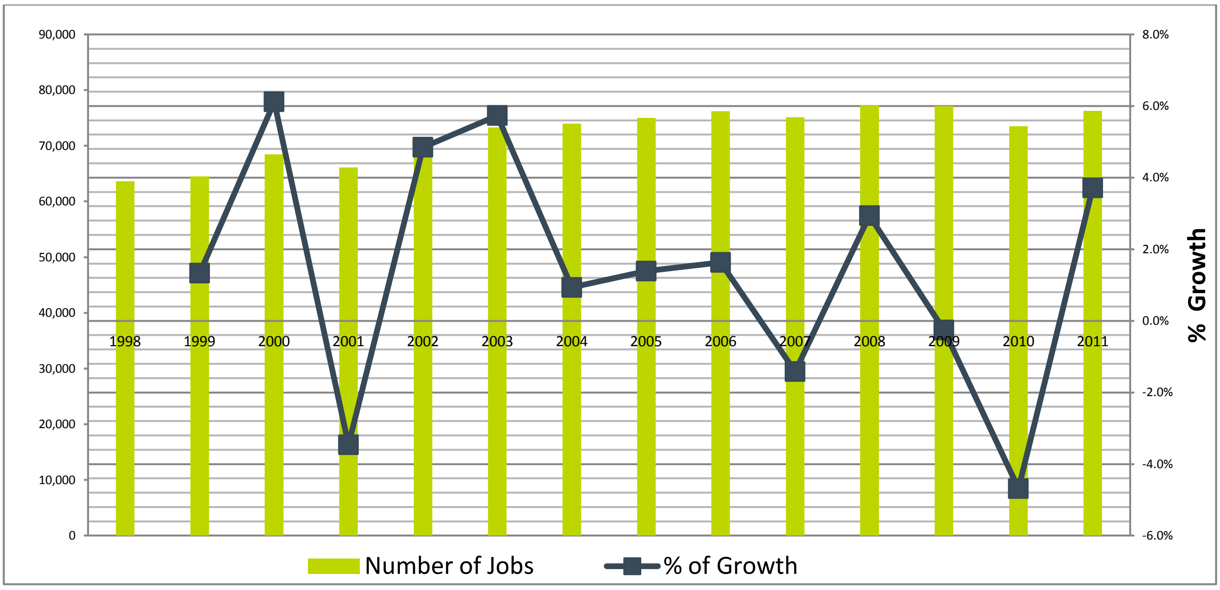
Source: Business Registrar and Employment Survey, NOMIS

Employment

Total Employment in Basildon Borough

B.1.6. There were over 76,252 jobs provided in Basildon Borough in 2011, representing an increase of around 19.8% since 1998, equivalent to an annual growth rate of 1.4% with the peak being in 2008. The rate of employment growth was slightly slower during the second half of the 13 year period, with annual growth running at 1.9% between 1998 and 2008 and 0.4% between 2004 and 2011.

Figure B.2 – Total Employment in Basildon Borough



Source: Annual Business Inquiry, NOMIS

Broad Sector General Analysis in Basildon Borough

B.1.7. This sector analysis had to be prepared in two stages as the trends differed post 2008 with the government revision of SIC classifications in 2007. The review of Basildon Borough has been broken down into pre-2008 classification covering 1998 to 2008 (Table B.4) and post 2008 classification covering 2008 to 2011 (Table B.5). The post 2008 analysis also considers the impact of the recession and the gradual recovery. Furthermore a comparison between annual average growth rates (Table B.6) covers Pre 2008 (1999-2008) based on SIC2003 and Post 2008 (2008-2011) based on SIC2007 for Basildon Borough, Essex, East of England and England & Wales.

Table B.4 – Basildon Borough Employment by Broad Sector (1998 – 2008)

Broad Sector	1998		2000		2004		2008		Ave annual % growth
	Level	% of Total	Level	% of Total	Level	% of Total	Level	% of Total	
Agriculture and fishing	275	0.4%	228	0.3%	125	0.2%	255	0.3%	-0.8%
Energy and water	1	0.0%	67	0.1%	64	0.1%	38	0.0%	43.9%
Manufacturing	13,302	20.9%	15,632	22.8%	13,928	18.8%	11,303	14.6%	-1.6%
Construction	2,646	4.2%	3,420	5.0%	4,278	5.8%	4,660	6.0%	5.8%
Distribution, hotels and restaurants	17,238	27.1%	17,147	25.0%	21,667	29.3%	19,967	25.8%	1.5%
Transport and communications	4,097	6.4%	4,658	6.8%	3,713	5.0%	3,921	5.1%	-0.4%
Banking, finance and insurance, etc	13,412	21.1%	14,142	20.7%	12,931	17.5%	15,039	19.4%	1.2%
Public administration, education & health	10,768	16.9%	10,742	15.7%	14,451	19.5%	18,784	24.3%	5.7%
Other services	1,933	3.0%	2,431	3.6%	2,802	3.8%	3,369	4.4%	5.7%
Total	**63,672**	**100%**	**68,467**	**100%**	**73,959**	**100%**	**77,336**	**100%**	**2.0%**

Source: Annual Business Inquiry, NOMIS

B.1.8. Employment in Basildon Borough is dominated pre 2008 by *distribution, hotels and restaurants* (25.8%), *public administration, education & health* (24.3%) and *banking and finance* (19.4%). However the revised SIC in 2007 broke down the classifications further. When clustering similar sectors in Post 2008 we see a similar distribution for *wholesale, retail trade, repair of motor* *vehicles* and *accommodation & food service activities* constitutes (25.6%), *public administration and defence, compulsory social security* and *education and human health and social work* (25.3%) and *Information and communications; financial and insurance activities; real estate, professional, scientific and technical activities* and *administration and support services* (19.1%).

B.1.9. The largest employment sector *distribution, hotels and restaurants* (Table B.4) in pre 2008 saw employment had risen at an average rate of 1.5% per annum since 1998, however when we consider post 2008 this has reduced by 0.73% for *Accommodation and food* and a further reduction of 1.04 % *Wholesale and retail trade* (Table B.5).

B.1.10. In pre 2008 period the overall growth rate for Basildon Borough was higher than regional average and national average at 2% but has faced a higher impact post 2008 with recession with a decline of 0.9% (Table B.6)

B.1.11. Pre 2008 employment in the *manufacturing* sectors has declined at an average rate of 1.6% per annum since 1998 representing 14.6% of total employment pre 2008; this largely reflects the long term national and regional decline in the manufacturing industry. Basildon Borough has experienced a relatively lower rate of decline in *manufacturing*, in comparison to the East of England and Essex, which achieved an average rate of decline at 3.6% and 3.4%, respectively. This trend continues post 2008 with Basildon Borough, Essex and East of England declining at 0.1%, 0.6% and 1.1% respectively and in 2011 represents 13.9% of total employment in the district.

B.1.12. In pre 2008 the *banking and finance* sector had grown at an annual growth 1.2% and constituted the third largest employer with 19.4% of total employment in the Borough. However, with impact of the recession the *financial sector* post 2008 has seen a annual decline of 11.4% which is substantially higher than the Essex (-3.9%) and East of England(-5.3%). However *real estate activities* and *information and communication* still remains positive with an annual growth rate of 6.27% and 1.31% respectively, while professional / scientific services had an average decline by 6.28% each year.

B.1.13. Public sector employment was the second largest employer (24.3%), categorised under *public administration and defence, compulsory social security; education* and *human health and social work activities*, reported growth equivalent to 5.7% per annum in Basildon Borough pre 2008. This trend continues post 2008 with growth in *public administration and defence, compulsory social security* (1.22%) and *education* (8.2%), except in *human health and social work activities* (-2.05%), which sees a decline.

B.1.14. *Construction* employment has grown rapidly between 1998–2008, not only locally but regionally and nationally, primarily in activities relating to the general construction of buildings. As a result the sector now accounts for 6% pre 2008 and 6.3% post 2008 of total employment in the Basildon Borough making it the fourth largest sector in 2011. Although the annual growth rate pre 2008 was 5.8% which was above the regional and national average, post 2008 this has declined by 2.7% which is above the regional average but below the national average.

B.1.15. *Transport and storage* and *information and communications* employment in Basildon Borough has remained between 5-6% of total employment pre 2008 with a marginal decline of 0.4%. However, post 2008 *transport* and *information and communications* sectors have seen growth, *information and communications* has a growth rate similar to the national rate while *transport and storage* has seen growth of 1.4% as there has been a decline regionally and nationally.

B.1.16. The highest growth is *energy and water* sectors growth of 43.9% between 1998 and 2008. This is due to a zero base in 1998, however when compared to growth after 2000 there is an annual average decline of 6.8%. Post 2008 *electricity, gas, steam and conditioning supply* has grown by an average of 8.10% while *water supply* has declined by an average of 4.22%.

Table B.5 – Basildon Borough Employment by Broad Sector (2008 - 2011)

Broad Sector	2008		2011		Ave annual % growth
	Level	% of Total	Level	% of Total	
Agriculture, forestry and fishing	10	0%	9	0%	-3.45%
Mining and quarrying	0	0%	3	0%	-
Manufacturing	10,640	14%	10,607	14%	-0.10%
Electricity, gas, steam and air conditioning supply	38	0%	48	0%	8.10%
Water supply; sewerage, waste management and remediation activities	404	1%	355	0%	-4.22%
Construction	5,196	7%	4,786	6%	-2.70%
Wholesale and retail trade; repair of motor vehicles and motorcycles	16,587	21%	16,073	21%	-1.04%
Transportation and storage	3,503	4%	3,653	5%	1.41%
Accommodation and food service activities	3,518	4%	3,442	5%	-0.73%
Information and communication	2,738	3%	2,847	4%	1.31%
Financial and insurance activities	4,071	5%	2,836	4%	-11.35%
Real estate activities	1,234	2%	1,481	2%	6.27%
Professional, scientific and technical activities	3,536	5%	2,911	4%	-6.28%
Administrative and support service activities	5,277	7%	4,511	6%	-5.09%
Public administration and defence; compulsory social security	2,775	4%	2,878	4%	1.22%
Education	4,857	6%	6,152	8%	8.20%
Human health and social work activities	10,897	14%	10,241	13%	-2.05%
Arts, entertainment and recreation	1,462	2%	1,633	2%	3.76%
Other service activities	1,560	2%	1,788	2%	4.65%
Total	**78,303**	**100%**	**76,254**	**100%**	**-0.88%**

Source: Business Registrar and Employment Survey, NOMIS

Table B.6 – Employment Growth (average annual % growth for 1998 – 2008 and 2008 - 2011)

1998 to 2008					2008 to 2011				
Broad Sector	**Basildon Borough**	**Essex**	**East of England**	**England & Wales**	**Broad Sector (2007 SIC)**	**Basildon Borough**	**Essex**	**East of England**	**England & Wales**
Agriculture and fishing	-0.8%	0.0%	-1.5%	-0.4%	Agriculture, forestry and fishing	-3.5%	-0.5%	-2.0%	-3.8%
Mining and quarrying	-	-	-	-	Mining and quarrying	-	-14.4%	-3.9%	-1.6%
Manufacturing	-1.6%	-3.4%	-3.6%	-3.9%	Manufacturing	-0.1%	-0.6%	-1.1%	-2.8%
Energy and water	43.9%	-10.2%	-5.5%	-2.6%	Electricity, gas, steam and air conditioning supply	8.1%	13.4%	10.7%	12.3%
					Water supply; sewerage, waste management and remediation activities	-4.2%	11.1%	6.9%	3.9%
Construction	5.8%	3.5%	3.0%	1.5%	Construction	-2.7%	-2.2%	-2.2%	-3.5%
Wholesale and retail trade; repair of motor vehicles and motorcycles	-	-	-	-	Wholesale and retail trade; repair of motor vehicles and motorcycles	-1.0%	-0.1%	0.6%	-1.0%
Transport and communications	-0.4%	2.6%	0.3%	0.9%	Transportation and storage	1.4%	-2.5%	-0.1%	-1.0%
					Information and communication	1.3%	2.1%	-1.4%	1.2%
Distribution, hotels and restaurants	1.5%	1.0%	0.7%	0.5%	Accommodation and food service activities	-0.7%	-2.3%	-2.3%	-0.2%
Banking, finance and insurance, etc	1.2%	2.6%	2.2%	2.6%	Financial and insurance activities	-11.4%	-3.9%	-5.3%	-1.6%
Public administration, education & health	5.7%	3.4%	2.4%	2.2%	Public administration and defence; compulsory social security	1.2%	-1.5%	-2.3%	-1.4%
					Education	8.2%	8.2%	1.6%	0.2%
					Human health and social work activities	-2.0%	0.2%	2.0%	2.5%
Real estate, renting and business activities	-	-	-	-	Real estate activities	6.3%	1.8%	-0.3%	1.8%
					Professional, scientific and technical activities	-6.3%	-6.1%	-2.4%	1.8%
					Administrative and support service activities	-5.1%	-3.1%	-3.2%	-1.6%
Other services	5.7%	3.7%	2.2%	2.2%	Arts, entertainment and recreation	3.8%	2.4%	3.7%	-1.0%
					Other service activities	4.7%	3.3%	5.7%	-0.5%
Total	**2.0%**	**1.6%**	**0.9%**	**0.9%**	**Total**	**-0.9%**	**-0.2%**	**-0.4%**	**-0.4%**

Source: Annual Business Inquiry (ABI) & Business Registrar and Employment Survey (BRES), NOMIS

Broad Sector Relative Representation

B.1.17. Tables B.7 show the employment location quotients for Basildon Borough with respect to Essex, East of England and England & Wales. An employment location quotient of less than 1.00 indicates that employment in the sector is under-represented in the study area compared to the wider area. A quotient of greater than 1.00 indicates that employment in the sector is over-represented.

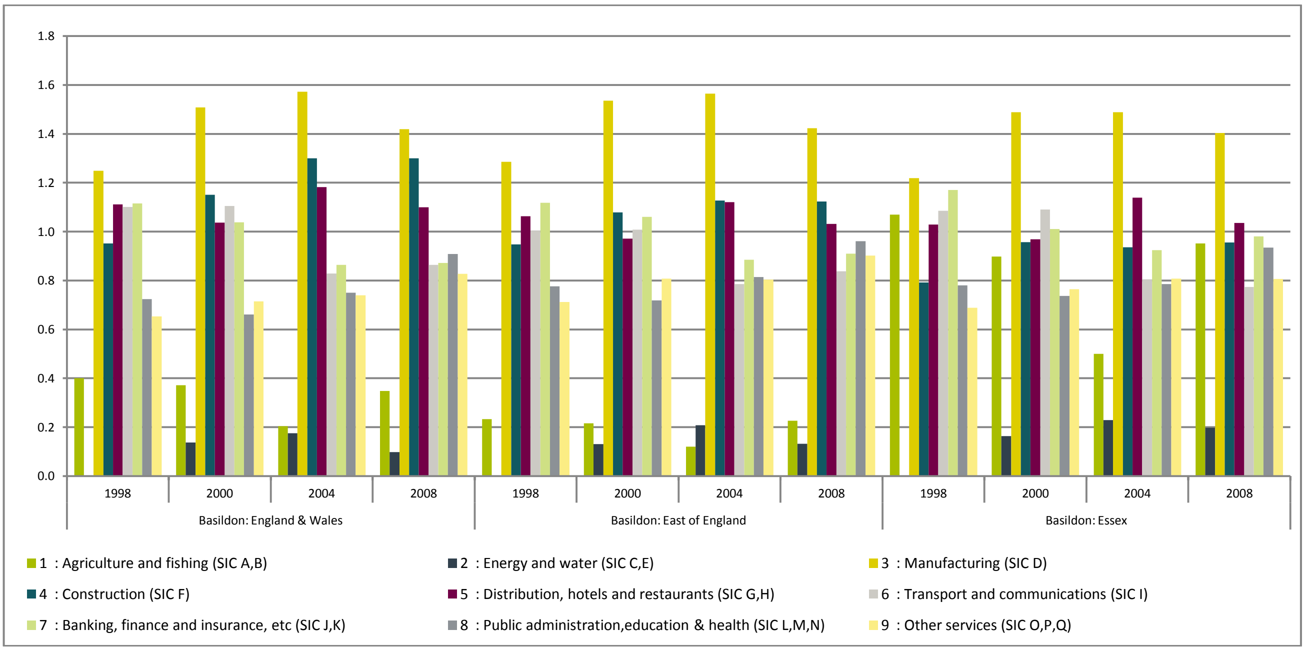
Broad Sector Relative Representation in Basildon Borough

B.1.18. In pre 2008 represented in Figure B.3 *manufacturing, construction* and *distribution, hotels and restaurants* have been performing relatively well in the Borough (-1.6%, 5.8% and 1.5% average annual growth respectively) in comparison to regional and national conditions. Post 2008 all three sectors continue a favourable quotient in comparison to the region. Although *manufacturing* continues to decline on a national and regional scale, it is less so in Basildon Borough and is likely to benefit with increased access to the Thames Gateway. This is evident in the declining annual growth rates experienced across the sector as shown in Table B.6.

B.1.19. Post 2008, *transportation and storage* and *information and communication* and *real estate activities* are growing sectors at 1.4%, 1.3% and 6.3% a year respectively and there quotients are in line with national and regional areas. While the *financial and insurance activities* sector has seen a decline and is over represented in comparison to the region.

B.1.20. Under-represented sectors include *administrative and support service activities*, *education and professional, scientific and technical activities* sector, despite the growth seen in education (at an annual average of 8.2%) achieved over years 2008 - 2011. Although the Public sector seems underrepresented in education and public administration which has seen growth of 8.2% and 1.2% respectively, in contrast the over represented healthcare has seen a decline. It is also anticipated that public sector cuts are likely to occur in the coming years, which are likely to have a substantial impact on this sector.

Figure B.3 – Total Employment in Basildon Borough Pre 2008 (1998-2008)



Source: Annual Business Inquiry (ABI), NOMIS

Table B.7 Basildon Borough Employment Quotients Post 2008 (2008-2011)

Broad Sector	Basildon Borough: England & Wales				Basildon Borough: East of England				Basildon Borough: Essex			
	2008	2009	2010	2011	2008	2009	2010	2011	2008	2009	2010	2011
1 : Agriculture, forestry & fishing (A)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.1
2 : Mining, quarrying & utilities (B,D and E)	0.6	0.8	0.5	0.5	0.7	0.8	0.6	0.5	0.8	0.8	0.7	0.6
3 : Manufacturing (C)	1.4	1.5	1.5	1.6	1.4	1.5	1.5	1.5	1.4	1.5	1.5	1.5
4 : Construction (F)	1.3	1.4	1.3	1.4	1.2	1.2	1.2	1.2	1.0	1.0	1.0	1.0
5 : Motor trades (Part G)	1.0	0.8	0.8	0.9	0.9	0.8	0.8	0.8	0.9	0.8	0.8	0.8
6 : Wholesale (Part G)	1.2	1.1	1.4	1.4	1.1	1.0	1.1	1.1	1.2	1.1	1.2	1.3
7 : Retail (Part G)	1.4	1.3	1.4	1.3	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2
8 : Transport & storage (inc postal) (H)	1.0	1.1	1.0	1.0	0.9	1.0	1.0	1.0	0.8	1.0	0.9	0.9
9 : Accommodation & food services (I)	0.7	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.7	0.8	0.8	0.7
10 : Information & communication (J)	0.9	0.9	0.9	0.9	1.1	1.1	1.2	1.2	1.3	1.4	1.3	1.3
11 : Financial & insurance (K)	1.3	1.1	0.9	0.9	1.6	1.4	1.4	1.4	1.6	1.2	1.3	1.3
12 : Property (L)	1.1	1.1	1.5	1.3	1.1	1.0	1.1	1.3	1.1	0.9	1.0	1.2
13 : Professional, scientific & technical (M)	0.7	0.5	0.5	0.5	0.6	0.5	0.5	0.6	0.7	0.6	0.6	0.7
14 : Business administration & support services (N)	0.8	0.7	0.6	0.7	0.7	0.6	0.6	0.7	0.8	0.7	0.7	0.8
15 : Public administration & defence (O)	0.7	0.7	0.7	0.7	0.8	0.8	0.9	0.9	0.9	0.9	0.9	0.9
16 : Education (P)	0.7	0.8	0.8	0.8	0.6	0.8	0.8	0.8	0.7	0.7	0.7	0.7
17 : Health (Q)	1.2	1.2	1.1	1.0	1.3	1.3	1.2	1.2	1.2	1.2	1.1	1.1
18 : Arts, entertainment, recreation & other services (R,S,T and U)	0.8	0.9	0.9	1.0	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.9
Total	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**	**1**

Source: Business Registrar and Employment Survey (BRES), NOMIS

Employment Location Quotients

B.1.21. In further analysis Figures B.4 to B.6 show the employment location quotients for Basildon Borough with respect to Essex, East of England and England & Wales respectively set against sector growth in each of the three areas. The size of the circle representing each sector is in proportion to the amount of total employment for the study area. Sectors identified in the upper right quadrant of each graph are those which are well represented in the Borough and have experienced growth in the wider economy. The lower left hand quadrant contains those sectors that are under-represented in the Borough and are in decline in the wider economy. The upper left quadrant contains those that are under-represented and are growing in the wider economy and the lower right quadrant contains those that are over-represented in the Borough and are declining in the wider economy.

Local Quotient Analysis in Basildon Borough

B.1.22. *Manufacturing* is the largest single sector employer (SIC2007 breakdown) which is declining in the wider economy but remains over-represented in Basildon Borough with a neutral growth post 2008.

B.1.23. The second and third largest employment sectors *retail* and *health* are also over represented in Basildon Borough and are witnessing decline in the region.

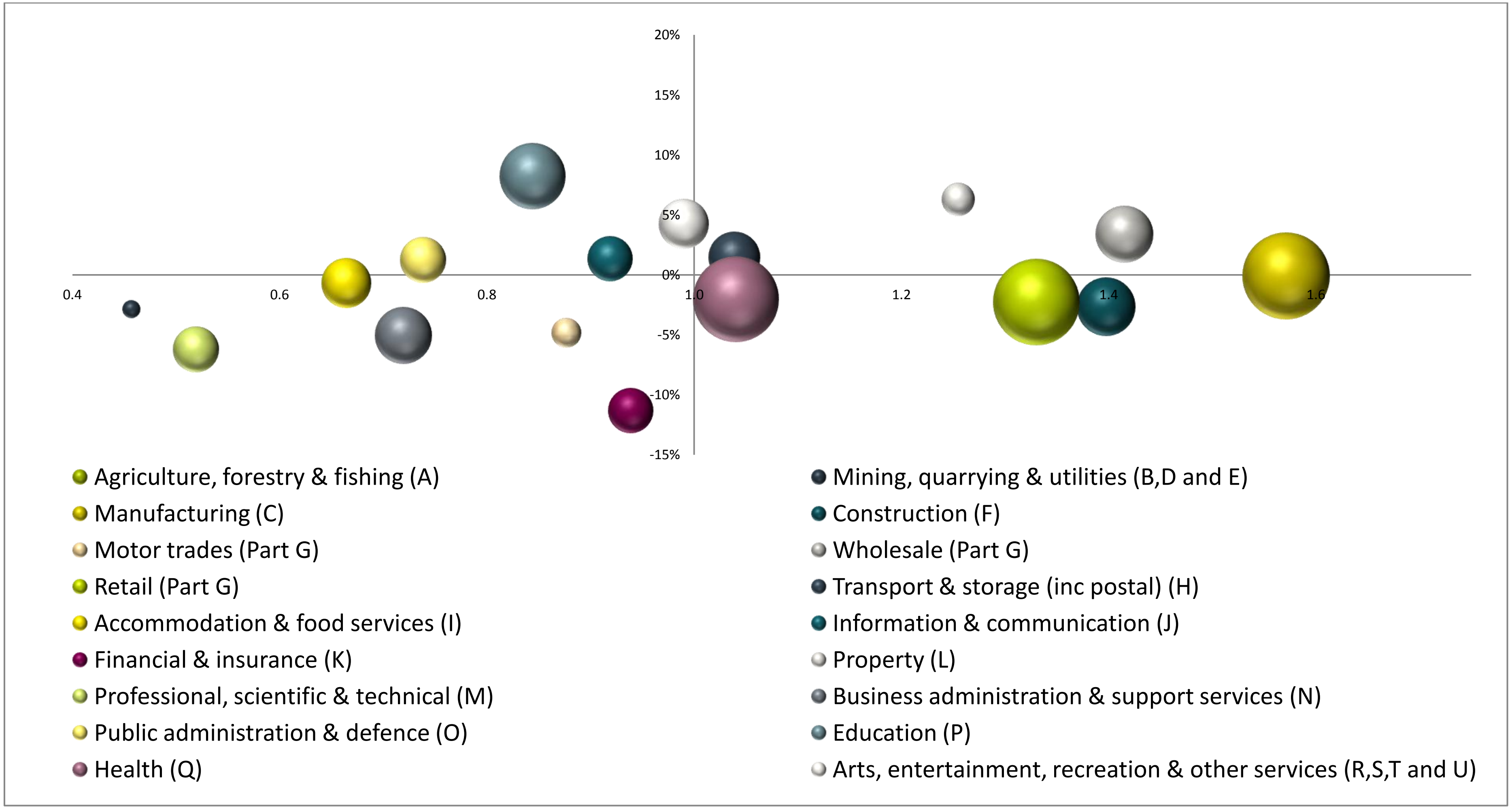
B.1.24. *Education* is the fastest growing sector and is under represented in the Borough. The sector has been performing well in all three of the wider study areas. The *property* sector has witnessed similar growth but is over-represented in the region.

B.1.25. Other sectors that are more or less in line with the wider region but is witnessing positive growth include *transport & storage; arts, entertainment and recreation; information and communications* with only *transport and storage* representing marginal decline in the wider region.

B.1.26. *Finance & insurance* is a declining sector in the wider economies and is over-represented in the Borough.

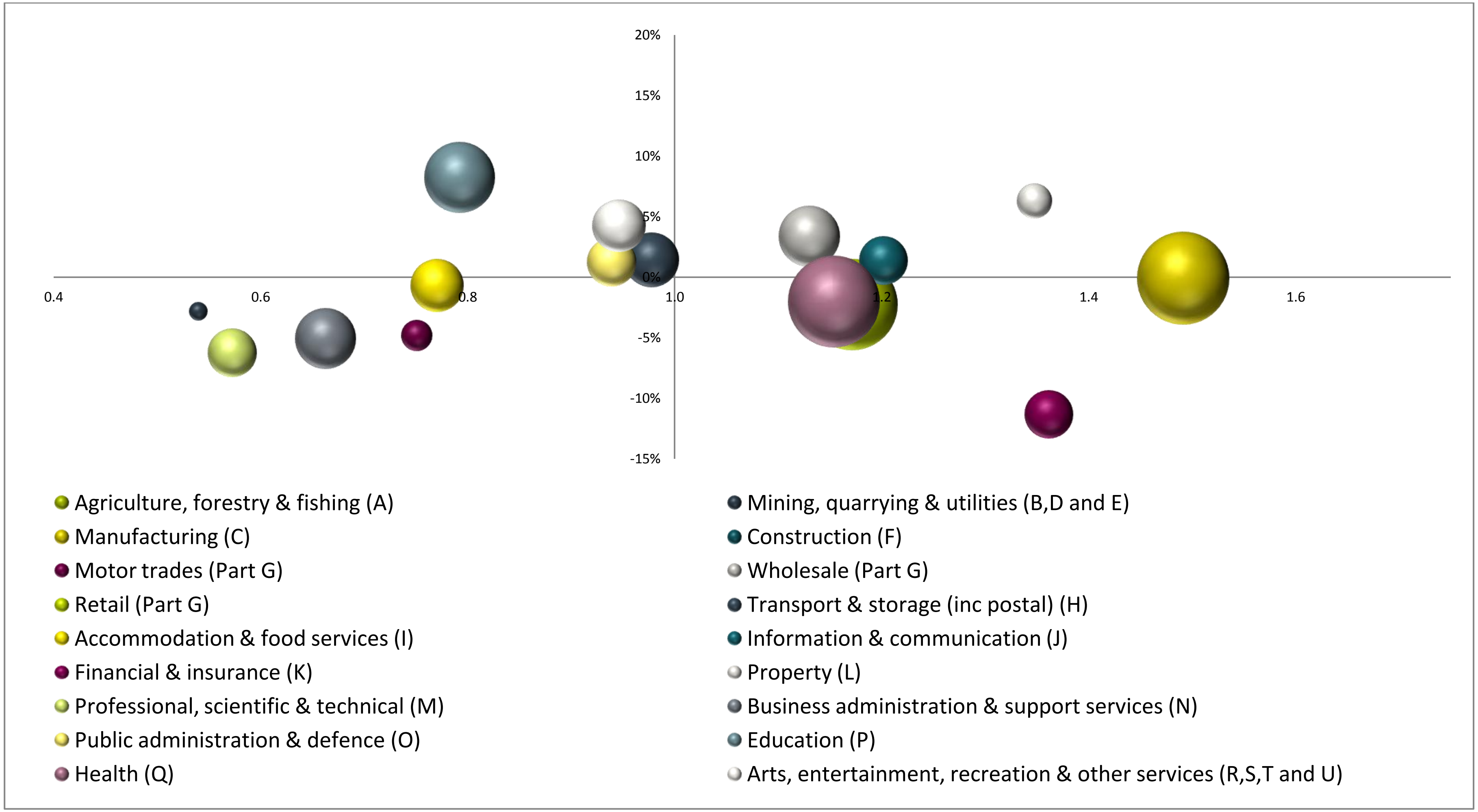
B.1.27. Service support industries in the Borough appear to be underrepresented such as *professional, scientific and technical activities* and *administrative and support service activities* have seen growth at a national level and are underrepresented in the region.

Figure B.4 – Basildon Borough: Location Quotients (2011) Against Sector Growth in England & Wales



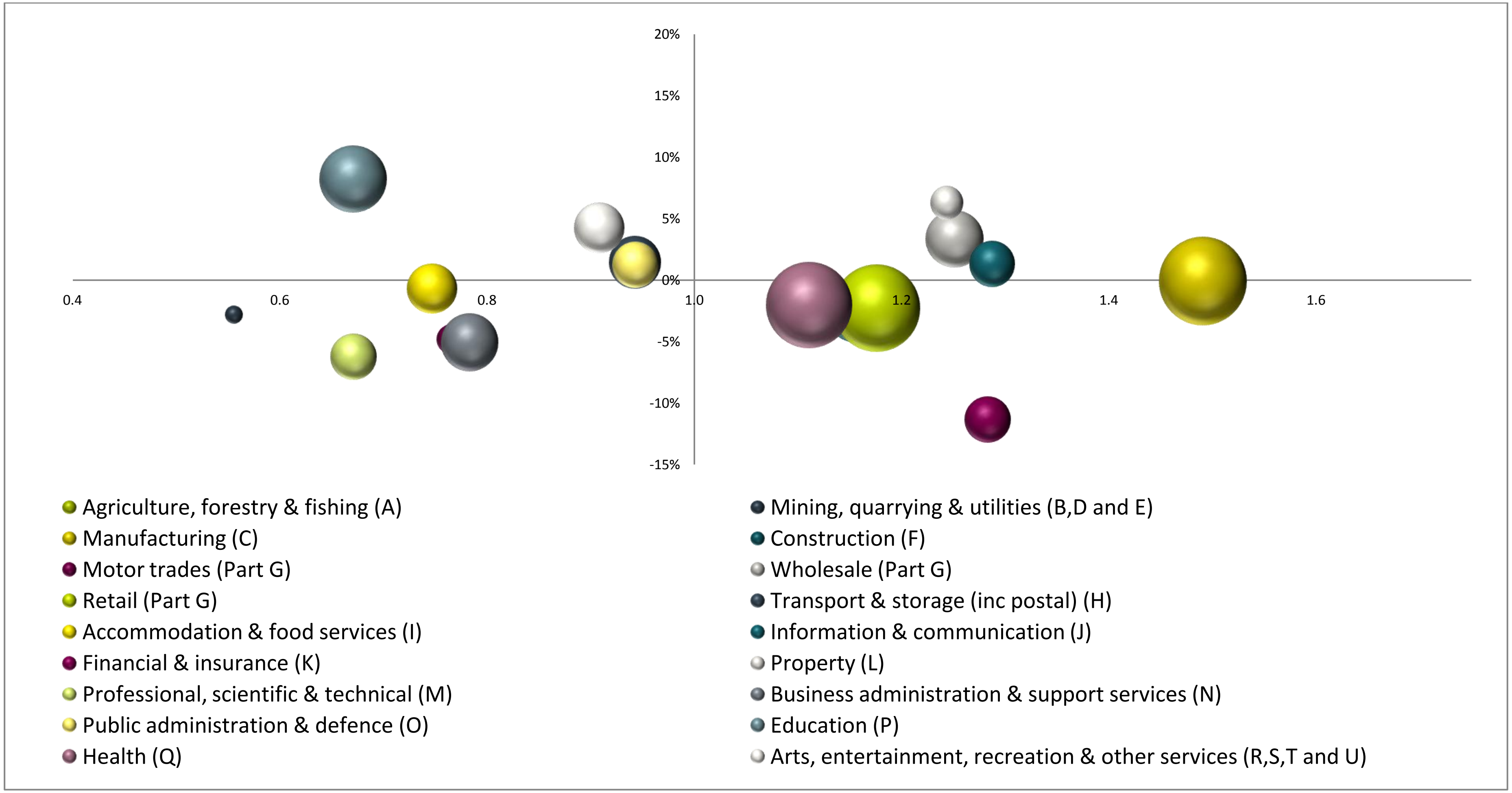
Source: Business Registrar and Employment Survey (BRES), NOMIS

Figure B.5 – Basildon Borough: Location Quotients (2011) Against Sector Growth in East of England



Source: Business Registrar and Employment Survey (BRES), NOMIS

Figure B.6 – Basildon Borough: Location Quotients (2011) Against Sector Growth in Essex



Source: Business Registrar and Employment Survey (BRES), NOMIS

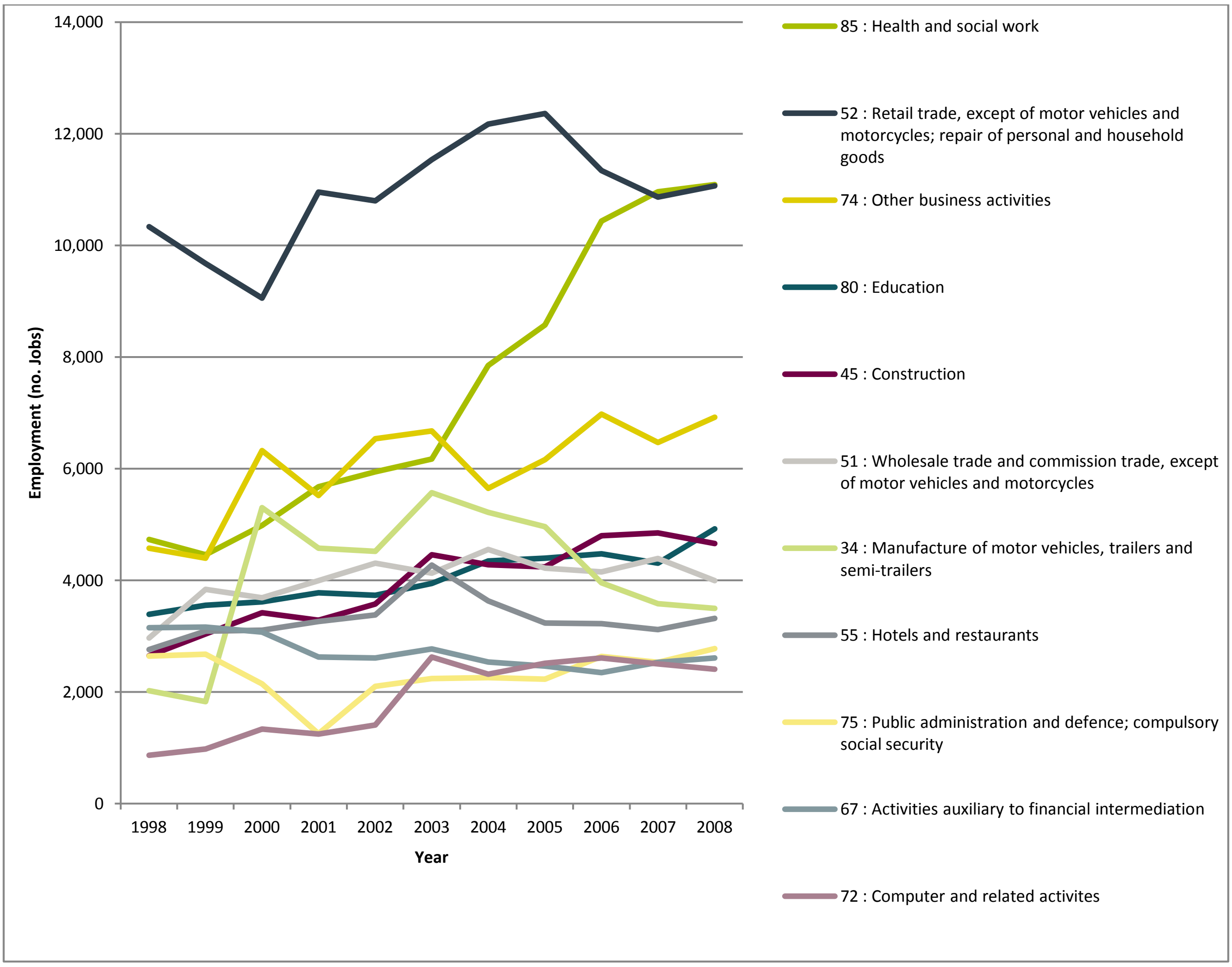
Detailed Sub-Sector Analysis

B.1.28. In understanding the dynamics of the local economy, it is useful to examine changes in employment by sub-sector (2-digit SIC code). The 2 digit SIC (Standard Industrial Classification) codes the type of business. Figure B.7 and Table B.9 shows the main sub-sectors in Basildon Borough as a share of total employment (those accounting for 1.8% or more of total employment in 2008). The largest four sub-sectors account over a third of all employment for the local authority areas. As 2 digit SIC codes were changed in 2007 Figure B.7 below shows a historic (pre 2008) representation in the form of a trend chart, Table B8 tabulates recent (Post 2008) major sectors.

Sub-Sector Analysis in Basildon Borough

B.1.29. Figure B.7 and Table B.8 looks at the key major employment sub-sectors pre and post 2008 in Basildon Borough. Pre 2008, the two largest employment sectors in the district were *retail trade* and *health services* that witnessed growth from 2003. In 2011 these sectors continue to remain prominent employers but they have seen a steady decline. In comparison the 3rd and 4th largest employers, *education* and *wholesale and retail trade, repair of motor vehicles* have seen an annual growth rate of 5-9%.

Figure B.7 – Basildon Borough Key Sub-Sectors (1998 – 2008)



Source: Annual Business Inquiry (ABI), NOMIS

Table B.8 – Basildon Borough Key Sub-Sectors (2008 – 2011) 2007 SIC classification

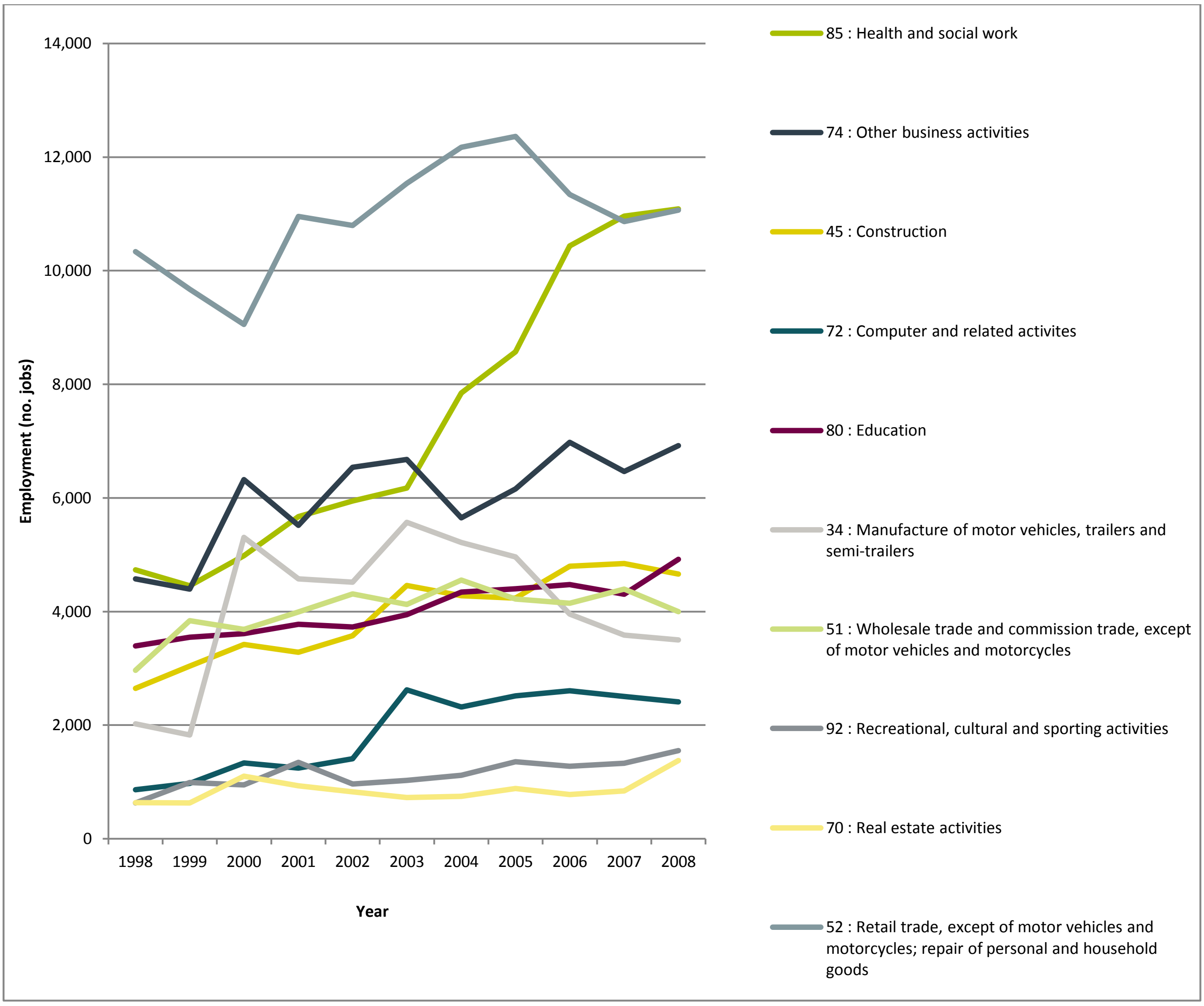
Subs Sector	2008		2009		2010		2011		Ave annual % growth
	No	%	No	%	No	%	No	%	
47 : Retail trade, except of motor vehicles and motorcycles	11,123	14.2%	10,557	13.7%	10,836	14.7%	10,374	13.6%	-2%
86 : Human health activities	7,558	9.7%	8,216	10.7%	7,168	9.7%	6,764	8.9%	-3%
85 : Education	4,857	6.2%	6,151	8.0%	6,064	8.2%	6,152	8.1%	9%
46 : Wholesale trade, except of motor vehicles and motorcycles	4,096	5.2%	3,436	4.5%	4,288	5.8%	4,519	5.9%	5%
43 : Specialised construction activities	3,983	5.1%	3,962	5.1%	3,104	4.2%	3,428	4.5%	-4%
56 : Food and beverage service activities	3,265	4.2%	3,318	4.3%	3,110	4.2%	3,151	4.1%	-1%
84 : Public administration and defence; compulsory social security	2,775	3.5%	3,073	4.0%	2,966	4.0%	2,878	3.8%	1%
29 : Manufacture of motor vehicles, trailers and semi-trailers	3,495	4.5%	2,979	3.9%	2,965	4.0%	2,865	3.8%	-6%
62 : Computer programming, consultancy and related activities	2,110	2.7%	1,849	2.4%	2,035	2.8%	2,206	2.9%	2%
88 : Social work activities without accommodation	1,907	2.4%	1,811	2.3%	1,951	2.7%	2,090	2.7%	3%
66 : Activities auxiliary to financial services and insurance activities	2,793	3.6%	2,442	3.2%	1,809	2.5%	1,969	2.6%	-10%
78 : Employment activities	2,184	2.8%	1,858	2.4%	1,411	1.9%	1,854	2.4%	-3%
52 : Warehousing and support activities for transportation	1,794	2.3%	1,976	2.6%	1,751	2.4%	1,853	2.4%	2%
68 : Real estate activities	1,234	1.6%	1,293	1.7%	1,609	2.2%	1,481	1.9%	7%
87 : Residential care activities	1,432	1.8%	1,616	2.1%	1,218	1.7%	1,387	1.8%	1%
81 : Services to buildings and landscape activities	1,078	1.4%	1,212	1.6%	1,381	1.9%	1,348	1.8%	8%

Source: Business Registrar and Employment Survey, NOMIS

Key Growth Sectors in Basildon Borough

B.1.30. Figure B.8 and Table B.9 looks at the key growth sub-sectors pre and post 2008 in Basildon Borough. Pre 2008 (Figure B.7) shows that *health, other business activities*, *construction and computer programming consultancy and related activities* had the highest rise in employment. However, post 2008 the Borough has seen the *education* sector with the strongest employment growth in absolute terms recording an increase of 1,295 jobs and 8.2% in the last 3 years. The fastest growing and second largest sector is *manufacture of other transport equipment;* and *manufacture of furniture*, which have recorded growth from a relatively small base in 2008.

Figure B.8 – Basildon Borough Key Growth Sub-Sectors (1998 – 2008)



Source: Annual Business Inquiry, NOMIS

Table B.9 –Basildon Borough Key Growth Sub-Sectors (2008 – 2011) 2007 SIC classification

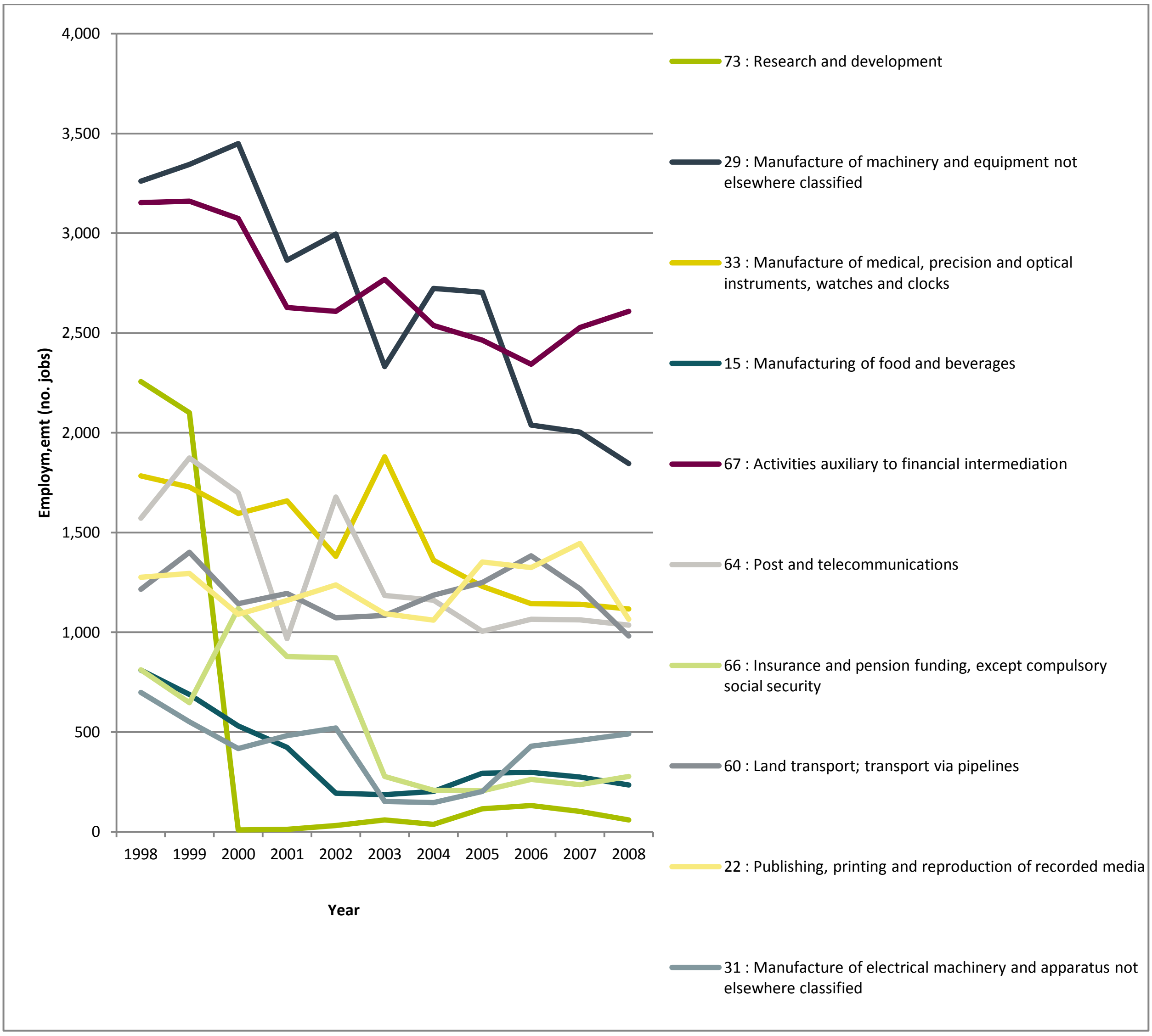
Subs Sector	2008		2011		Ave annual % growth	Absolute Change
	No	%	No	%		
85 : Education	4,857	6.2%	6,152	8.1%	8.2%	1,295
30 : Manufacture of other transport equipment	11	0.0%	1,222	1.6%	380.7%	1,211
31 : Manufacture of furniture	199	0.3%	665	0.9%	49.5%	466
46 : Wholesale trade, except of motor vehicles and motorcycles	4,096	5.2%	4,519	5.9%	3.3%	423
33 : Repair and installation of machinery and equipment	188	0.2%	527	0.7%	41.0%	339
41 : Construction of buildings	868	1.1%	1,175	1.5%	10.6%	307
81 : Services to buildings and landscape activities	1,078	1.4%	1,348	1.8%	7.7%	270
68 : Real estate activities	1,234	1.6%	1,481	1.9%	6.3%	247
88 : Social work activities without accommodation	1,907	2.4%	2,090	2.7%	3.1%	183
49 : Land transport and transport via pipelines	886	1.1%	1,068	1.4%	6.4%	182
22 : Manufacture of rubber and plastic products	394	0.5%	530	0.7%	10.4%	136
93 : Sports activities and amusement and recreation activities	949	1.2%	1,081	1.4%	4.4%	132
70 : Activities of head offices; management consultancy activities	621	0.8%	741	1.0%	6.1%	120
20 : Manufacture of chemicals and chemical products	132	0.2%	239	0.3%	21.9%	107
84 : Public administration and defence; compulsory social security	2,775	3.5%	2,878	3.8%	1.2%	103
94 : Activities of membership organisations	199	0.3%	299	0.4%	14.5%	100

Source: Business Registrar and Employment Survey (BRES), NOMIS

Key Sectors in Decline in Basildon Borough

B.1.31. Figure B.9 and Table B.10 looks at the key declining sub-sectors pre and post 2008 in Basildon Borough. Pre 2008 the major declining industries including *research and development* which witnessed a drop in 2000 and over half of the sub-sectors are based in the manufacturing sector, highlighting the state of general decline that the sector has been undergoing. Post 2008 the Manufacturing decline trend continues, but *auxiliary financial services, human health* and *retail trade* have seen the highest decline post 2008.

Figure B.9 – Basildon Borough Key Sub-Sectors in Decline (1998-2008)



Source: Annual Business Inquiry (ABI), NOMIS

Table B.10 –Basildon Borough Key Declining Sub-Sectors (2008 – 2011) 2007 SIC Classification

Subs Sector	2008		2011		Ave annual % growth	Absolute Change
	No	%	No	%		
66 : Activities auxiliary to financial services and insurance activities	2,793	3.6%	1,969	2.6%	-11.0%	- 824
86 : Human health activities	7,558	9.7%	6,764	8.9%	-3.6%	- 794
47 : Retail trade, except of motor vehicles and motorcycles	11,123	14.2%	10,374	13.6%	-2.3%	- 749
29 : Manufacture of motor vehicles, trailers and semi-trailers	3,495	4.5%	2,865	3.8%	-6.4%	- 630
82 : Office administrative, office support and other business support activities	1,317	1.7%	737	1.0%	-17.6%	- 580
28 : Manufacture of machinery and equipment n.e.c.	1,724	2.2%	1,158	1.5%	-12.4%	- 566
26 : Manufacture of computer, electronic and optical products	1,124	1.4%	561	0.7%	-20.7%	- 563
43 : Specialised construction activities	3,983	5.1%	3,428	4.5%	-4.9%	- 555
25 : Manufacture of fabricated metal products, except machinery and equipment	1,231	1.6%	690	0.9%	-17.5%	- 541
71 : Architectural and engineering activities; technical testing and analysis	1,584	2.0%	1,069	1.4%	-12.3%	- 515
78 : Employment activities	2,184	2.8%	1,854	2.4%	-5.3%	- 330
64 : Financial service activities, except insurance and pension funding	1,013	1.3%	749	1.0%	-9.6%	- 264
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	1,369	1.7%	1,179	1.5%	-4.9%	- 190
42 : Civil engineering	345	0.4%	183	0.2%	-19.1%	- 162
73 : Advertising and market research	204	0.3%	51	0.1%	-37.0%	- 153
65 : Insurance, reinsurance and pension funding, except compulsory social security	265	0.3%	118	0.2%	-23.6%	- 147
56 : Food and beverage service activities	3,265	4.2%	3,151	4.1%	-1.2%	- 114
77 : Rental and leasing activities	437	0.6%	334	0.4%	-8.6%	- 103

Source: Business Registrar and Employment Survey, NOMIS

B-Use Class Employment

B.1.32. Most ‘employment’ policies contained in development plans relate to jobs associated with premises which accommodate business and industrial activities categorised under the B-Use Class (B1a, B1b, B1c, B2 and B8). Although an important component of total employment is generated by activities not classified as B-use, it is important for our analysis to consider separately activities traditionally the subject of employment policies in development plans.

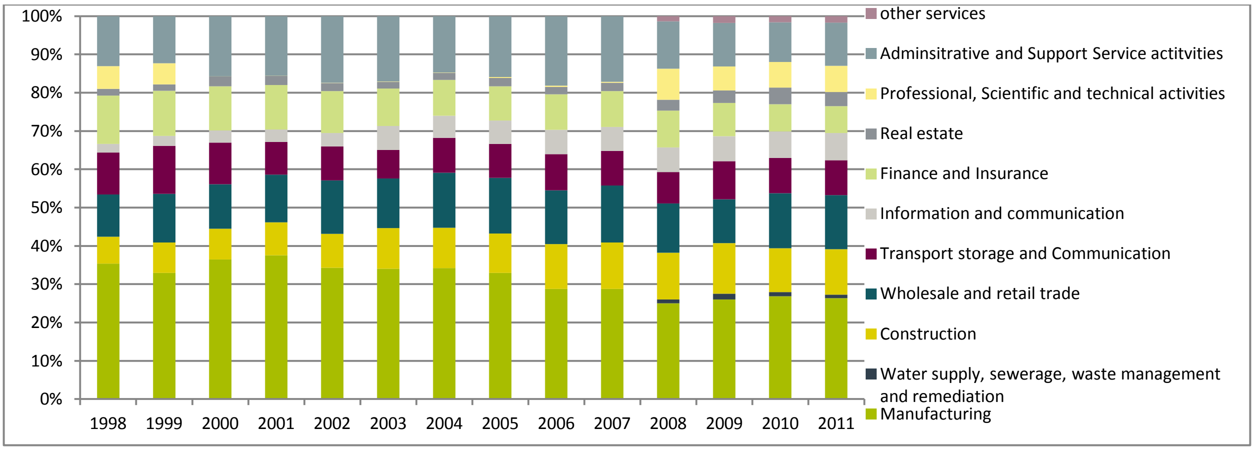
B.1.33. Table B.11 and B.12 shows the level of B-use employment in the study area. B-use employment has been estimated using an in-house modelling technique[40]. B-use employment accounts for 52% of total employment in Basildon Borough with the remaining in *retail, health* and *education services*.

B-Use Class Employment in Basildon Borough

B.1.34. Figure B.10 traces the trend of B-Use distribution from 1998 to 2011 within Basildon Borough. *wholesale and retail trade, repair of motor vehicles*, *transport and storage* and *information and communication* are stable large scale B-Use classes. *Manufacturing* is the largest B-use but has seen a steady decline.

[40] See table B.26 for a list of SIC codes that constitute the B-use class employment categories.

Figure B.10 – Basildon Borough B-Use distribution (1998-2011)



Source: Annual Business Inquiry & Business Registrar and Employment Survey, NOMIS

B.1.35. *Manufacturing* is the largest of the B-use sectors in Basildon Borough, accounting for 26% of all B jobs. However, as previously stated, the sector's average annual rate of decline of 0.1% per annum (decline of 1.7% in 2007-2011) is stronger than rates seen in the wider areas (Essex, East of England and England & Wales). After factoring the impact of the recession post 2007 we see in Basildon Borough, *information and communication* and *real estate* are the two fastest growing. *Wholesale and retail trade* is the largest growing sector in the Borough and is outperforming the surrounding region.

Table B.11 – Basildon Borough B-Use Employment

Broad Sector	2007		2009		2011		Average Annual Growth %
	Jobs	% of Total	Jobs	% of Total	Jobs	% of Total	
Manufacturing	11,504	29%	10,278	26%	10,608	26%	-1.7%
Water supply, sewerage, waste management and remediation	0	0%	596	2%	354	1%	-4.3%
Construction	4,848	12%	5,204	13%	4,786	12%	4.7%
Wholesale and retail trade	5,942	15%	4,519	11%	5,698	14%	2.5%
Transport storage and Communication	3,628	9%	3,924	10%	3,653	9%	-0.9%
Information and communication	2,504	6%	2,562	6%	2,848	7%	9.6%
Finance and Insurance	3,755	9%	3,436	9%	2,836	7%	-3.9%
Real estate	844	2%	1,293	3%	1,481	4%	6.7%
Professional, Scientific and technical activities	103	0%	2,464	6%	2,769	7%	1.6%
Administrative and Support Service activities	6,872	17%	4,498	11%	4,511	11%	-0.6%
other services	0	0%	706	2%	701	2%	7.0%
Total	**40,000**	**100%**	**39,480**	**100%**	**40,245**	**100%**	

Source: Annual Business Inquiry & Business Registrar and Employment Survey, NOMIS

Table B.12 – B-use Employment Growth (Average Annual % Growth from 1998-2008 and 2008-2011)

	1998 to 2008				2008 to 2011			
	Basildon Borough	Essex	East of England	England & Wales	Basildon Borough	Essex	East of England	England & Wales
Manufacturing	-1.6%	-3.4%	-3.6%	-3.9%	-0.1%	-0.6%	-1.1%	-2.8%
Construction	5.8%	3.5%	3.0%	1.5%	-2.7%	-2.2%	-2.2%	-3.5%
Wholesale and retail trade	3.0%	0.4%	0.1%	-0.5%	1.4%	1.3%	1.0%	-0.9%
Transport storage and Communication	-0.4%	2.6%	0.3%	0.9%	1.4%	-2.5%	-0.1%	-1.0%
Accommodation & food services (I)	1.9%	2.4%	1.5%	1.5%	-0.7%	-2.3%	-2.3%	-0.2%
Information and communication	10.8%	4.0%	1.7%	3.8%	1.3%	2.1%	-1.4%	1.2%
Finance and Insurance	-2.1%	-2.6%	-1.9%	0.2%	-11.4%	-3.9%	-5.3%	-1.6%
Real estate	8.1%	6.5%	5.7%	4.9%	6.3%	1.8%	-0.3%	1.8%
Professional, Scientific and technical activities	-30.4%	-7.7%	0.7%	1.5%	-6.3%	-6.1%	-2.4%	1.8%
Administrative and Support Service activities	4.1%	4.5%	3.1%	3.0%	-2.8%	-2.5%	-2.9%	-1.6%

Source: Annual Business Inquiry & Business Registrar and Employment Survey, NOMIS

Industrial and Warehouse Employment

B.1.36. Tables B.13 and B.14 set out the level of industrial and warehousing related employment in Basildon Borough. It also sets out location quotients for the activities which provide a measure of the extent to which employment in each activity compares to the East of England benchmark.

B.1.37. The SIC codes included under each sector heading are based on the SIC 2007. The sectors are designed to capture as closely as possible all industrial based employment. A breakdown of the SIC codes included in each sector can be found in Tables B.26.

Industrial and Warehouse Employment in Basildon Borough

B.1.38. *Manufacturing* activities account for the large majority of industrial sector employment in Basildon Borough at 63%, and is over-represented compared to the East of England average. The *manufacturing* sector has been in decline and is expected to continue along this trend. The *construction* sector on the other hand has a positive growth rate and is underrepresented in comparison to East of England average. There has been a recent increase in employment of 6% in East of England in manufacturing[41] 2010-11 (latest available data). However, whilst total manufacturing output at the UK level has clearly increased over this period, there is no evidence yet that this has translated into an increase in the number of manufacturing jobs available, or that this is the beginning of a structural shift in the economy. Most economists believe that past trends in manufacturing decline are likely to continue, and there is no evidence to suggest Basildon Borough would not follow the trend seen nationally and locally prior to the recession.

B.1.39. It is therefore likely that total industrial sector employment will also continue to decline. However, it is important for employment policies to recognise that industrial land use is not uniquely required by manufacturers and that there are areas of the economy where there may be demand for industrial land, in particular through some *construction* activities such as plumbing and joinery installation.

[41] ONS June 2011 http://www.statistics.gov.uk/cci/nugget.asp?id=198

Table B.13 – Basildon Borough Industrial Sector Employment

Industrial Sector	1998		2008		2011		Average % growth	Location Quotient With East of England (2011)
	No.	% of total	No.	% of total	No.	% of total		
Manufacturing	13,302	78%	10,640	60%	10,608	63%	-2%	1.1
Construction	2,646	15%	5,196	30%	4,786	28%	5%	0.9
Motor Vehicle Activities	1,179	7%	1,369	8%	1,179	7%	0%	0.6
Sewage & Refuse Disposal	0	0%	404	2%	353	2%	-4%	5.4
Total	**17,127**	**100%**	**17,609**	**100%**	**16,926**	**100%**	**-0.1%**	1.0

Source: Annual Business Inquiry & Business Registrar and Employment Survey, NOMIS

B.1.40. The warehouse sector is well represented in Basildon Borough when compared to the East of England as a whole. The sector has seen employment grow at an annual average rate of 3% in the Borough, driven by employment in *warehouse, supporting and auxiliary transport activities*. *Warehousing and storage* represents a total employment share of 10.7% in Basildon Borough. Wholesale activity accounts for just over half of warehouse related employment in the Borough and is in line when compared to the wider East of England economy.

Table B.14 – Basildon Borough Warehouse Sector Employment

Industrial Sector	1998		2008		2011		Average % growth	Location Quotient With East of England (2011)
	No.	% of total	No.	% of total	No.	% of total		
Freight transport by road	1,215	17%	886	12%	1,068	13%	-1%	0.7
Warehouse, Supporting and auxiliary transport activities;	1,297	18%	1,794	24%	1,853	23%	3%	1.3
Post & Courier activities	1,572	22%	796	11%	704	9%	-6%	0.8
Wholesale	2,966	42%	4,096	54%	4,519	55%	3%	1.0
Total	**7,050**	**100%**	**7,572**	**100%**	**8,144**	**100%**	**1%**	**1.0**

Source: Annual Business Inquiry & Business Registrar and Employment Survey (BRES), NOMIS

Business Size

Business Structure in Basildon Borough

B.1.41. The business structure of Basildon Borough is dominated by micro units of between 1 and 10 employees. In 2012 they account for 79% of all businesses in Basildon Borough. Of the total number of micro units in the Borough, units which have up to four employees account for 83%.

Table B.15 – Business Units Size in Basildon Borough

Business Units Size	1998		2004		2008		2012		Ave annual % growth
	Level	% of total	Level	% of total	Level	% of total	Level	% of total	
Micro (1-10 employees)	4,659	83%	5,158	94%	5,546	98%	5,060	79%	0.6%
Small (11-49 employees)	775	14%	839	15%	848	15%	605	9%	-1.8%
Medium (50-199 employees)	133	2%	190	3%	194	3%	95	1%	-2.4%
Large (200 or more employees)	37	1%	38	1%	43	1%	20	0%	-4.3%
Total	**5,604**	**100%**	**5463**	**100%**	**5671**	**100%**	**6,386**	**100%**	**0.9%**
Micro A (1-4 employees)			3,025	84%	4,355	81%	4,480	83%	5.0%
Micro B (5-10 employees)			560	16%	1,015	19%	920	17%	6.4%
Total Micro			**3,585**	**100%**	**5,370**	**100%**	**5,400**	**100%**	**5.3%**

Source: Annual Business Inquiry (ABI), NOMIS & ONS UK Business: Activity, Size and Location

Business Growth

B.1.42. Overall business units have grown at an average rate of 6.0% in Basildon Borough per annum since 2007 which is above Essex and East of England rates. The growth has been strongest in Micro industries below 4 employees.

Table B.16 – Business Unit Growth by Size (Average Annual % Growth) 2007-2012

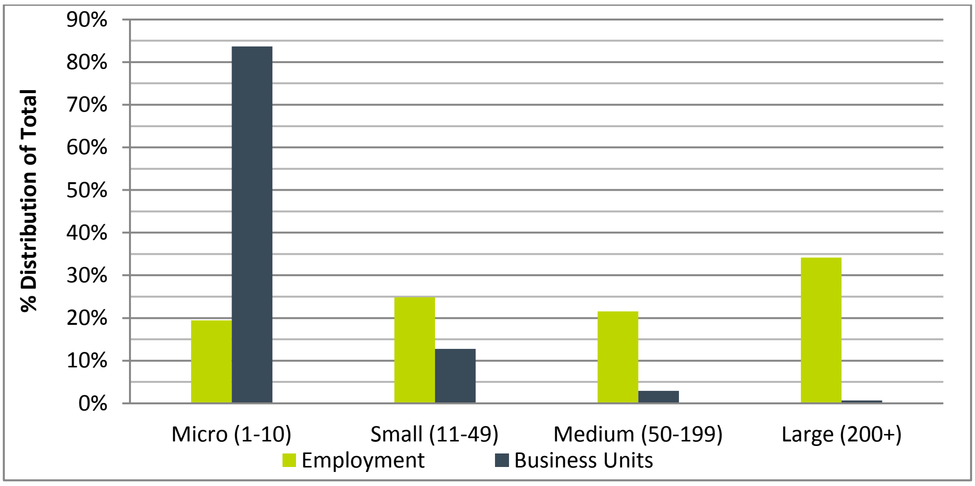
Business Units Size	Basildon Borough	Essex	East of England	England & Wales
Micro (1-10 employees)	6.2%	5.3%	5.2%	5.4%
Small (11-49 employees)	4.3%	5.6%	4.2%	4.7%
Medium (50-249 employees)	4.8%	6.2%	5.2%	4.8%
Large (250 or more employees)	5.9%	6.3%	4.0%	2.6%
Total	**6.0%**	**5.4%**	**5.1%**	**5.3%**
Micro A (1-4 employees)	6.3%	5.3%	5.1%	5.3%
Micro B (5-10 employees)	5.8%	5.8%	5.8%	5.8%
Total Micro	**6.2%**	**5.3%**	**5.2%**	**5.4%**

Source: ONS UK Business: Activity, Size and Location

Business Units in Basildon Borough

B.1.43. Micro-businesses, of 1 to 10 employees, make up 84% of the business units and account for the 19% of employment. Figure B.10 shows that Medium and Large businesses combined provide 56% of total employment in Basildon Borough but constitute only 4% of total business units. This highlights the skew of micro and small businesses in the Basildon Borough economy.

Figure B.10 – Business Unit and Employment Comparison for Basildon Borough (2008)



Source: Annual Business Inquiry, NOMIS

Business Unit Structure in Basildon Borough

B.1.44. Table B.17 looks at the business unit structure in Basildon Borough by sector and size. It clearly shows that the *construction, transport and communications, distribution, hotels and restaurants*, *banking, finance and insurance* and *other services* sectors are dominated by micro businesses. The *manufacturing*, *public administration, education & health* sector is far more geared towards larger business units.

Table B.17 – Basildon Borough Broad Sectors by Business Units Size (2008)

Broad Sector	Micro % of Total	Small % of Total	Medium % of Total	Large % of Total	Total
Agriculture and fishing	88%	8%	4%	0%	100%
Energy and water	0%	100%	0%	0%	100%
Manufacturing	78%	18%	3%	1%	100%
Construction	94%	5%	1%	0%	100%
Distribution, hotels and restaurants	80%	17%	2%	1%	100%
Transport and communications	80%	16%	3%	1%	100%
Banking, finance and insurance, etc	90%	8%	2%	0%	100%
Public administration, education & health	56%	29%	13%	2%	100%
Other services	85%	12%	2%	0%	100%
Total	84%	13%	3%	1%	100%

Source: Annual Business Inquiry (ABI), NOMIS

Average Business Unit Structure in Basildon Borough

B.1.45. Table B.18 looks at average business sizes in Basildon Borough by sector. Both manufacturing and energy and water show weak trends of falling average business sizes. This also compares as substantially smaller when compared in the wider study areas. The *transport and communications* sector have experienced growth in unit size which is yet to match the wider region.

Table B.18 – Average Business Unit Size in Basildon Borough (Number of Employees)

Broad Sector	Basildon				Essex (2008)	East of England (2008)	England & Wales (2008)
	1998	2000	2004	2008			
Agriculture and fishing	6	7	6	3	8	3	4
Energy and water	40	30	25	19	38	34	22
Manufacturing	16	15	14	13	21	17	15
Construction	4	3	4	4	4	5	4
Distribution, hotels and restaurants	8	9	9	9	12	9	9
Transport and communications	10	11	11	12	10	15	13
Banking, finance and insurance, etc	6	7	6	5	8	7	6
Public administration, education & health	27	26	30	28	36	32	30
Other services	5	5	6	6	8	7	6
Total	**9**	**9**	**9**	**9**	**12**	**11**	**10**

Source: Annual Business Inquiry, NOMIS

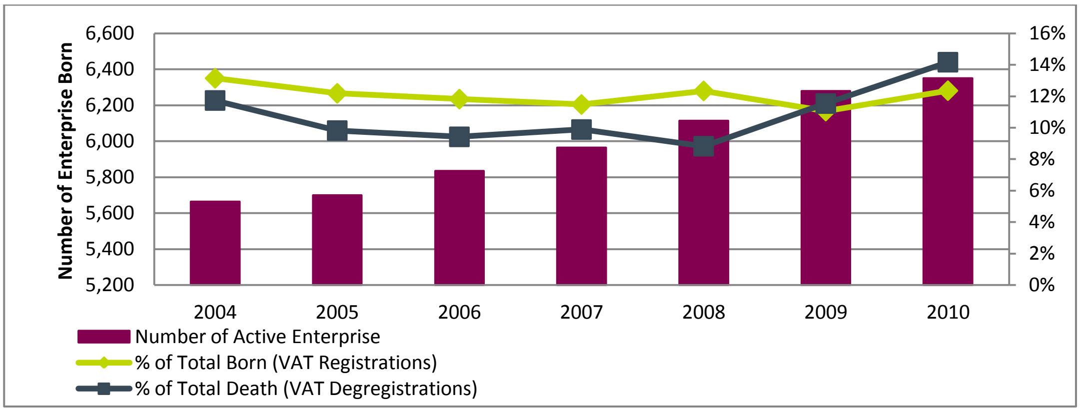
Enterprise

B.1.46. VAT registrations and de-registrations can be used as a proxy for measuring enterprise activity and business survival rates. Figure B.11 and Figure B.12 detail VAT activity in Basildon Borough.

VAT Registrations in Basildon Borough

B.1.47. Annual VAT registrations have outstripped de-registrations in Basildon Borough since 2004 until 2009. As a result the overall stock of VAT registered businesses has increased by 12% since 2004.

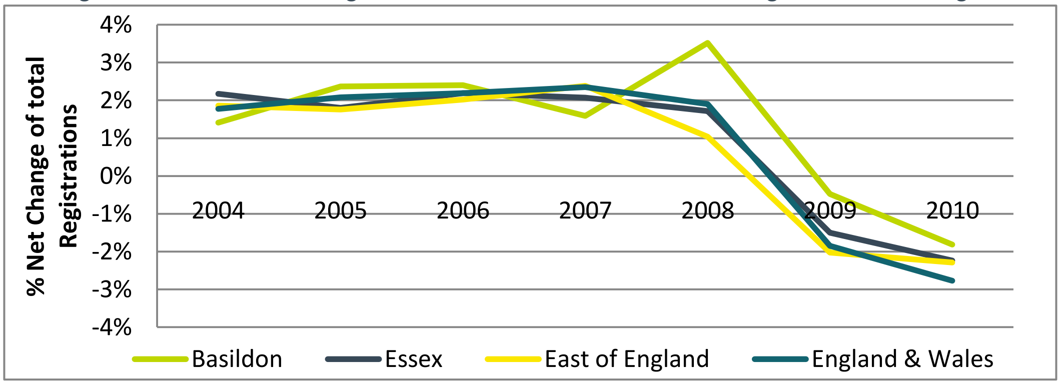
Figure B.11 – VAT Registered Business in Basildon Borough



Source: Business Demographics, ONS

B.1.48. A comparison of Net VAT registrations (Figure B.12) in the wider regions reveals that although Basildon Borough matches the wider region till 2007, 2008 saw a spurt in positive registrations, this remained above the regional average through the recession.

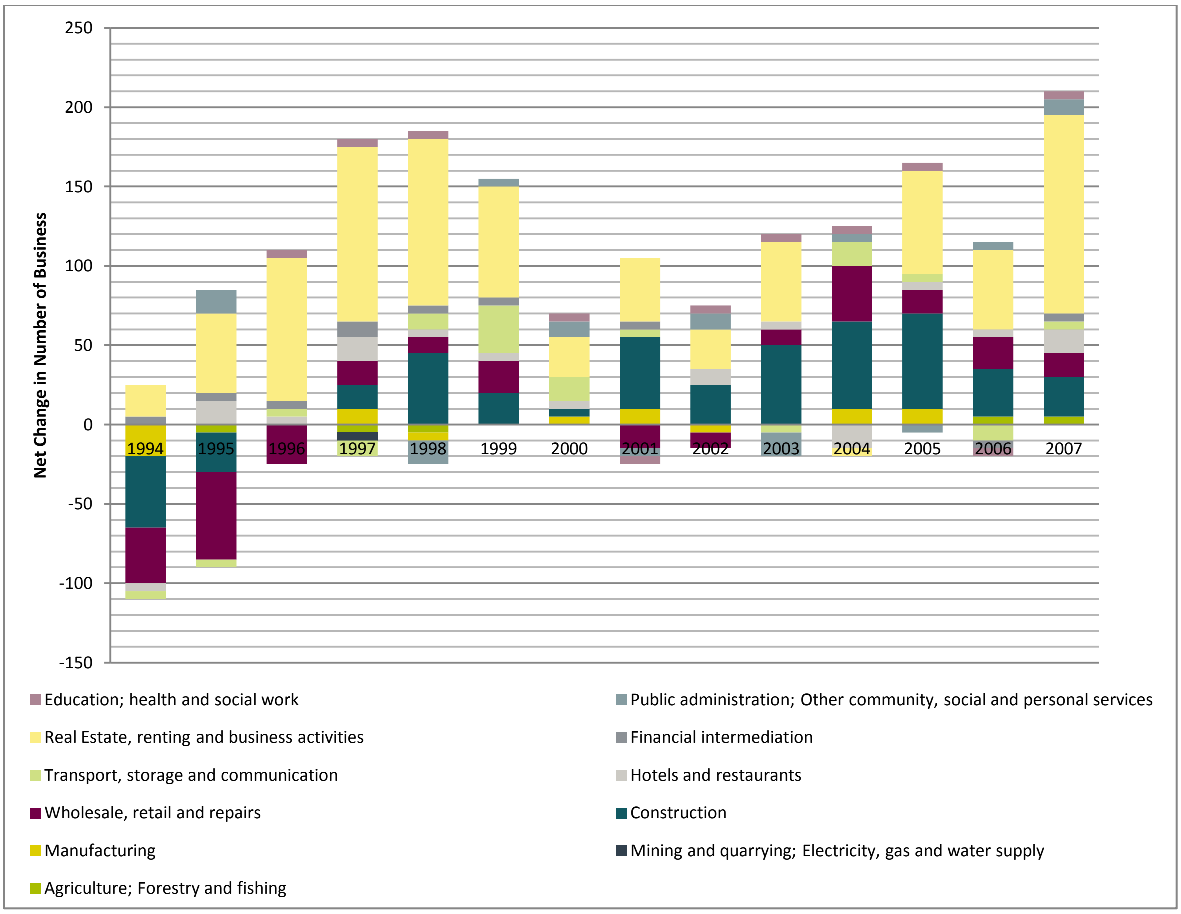
Figure B.12 – Net VAT Registered Business in Basildon Borough and Wider Region



Source: Business Demographics, ONS

B.1.49. Assessing a breakdown of net VAT registrations by industry (only available till 2007), shows that *construction, wholesale, retail and repairs* and *real estate, renting and business activities* form the most registrations since 2004. Public sector and *hotels and restaurants* have seen minor gains since 2004. The *manufacturing* sector has experienced cycles throughout the period reviewed.

Figure B.13 – Net VAT Registered Business in Basildon Borough by Industry (1994-2007)



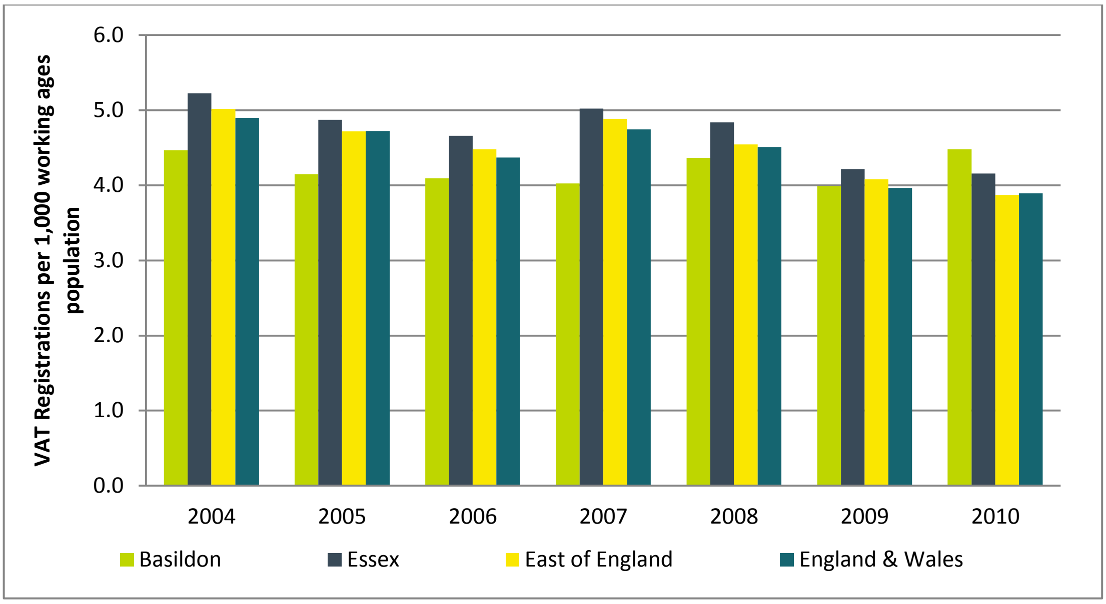
Source: VAT Registrations and Stocks; NOMIS

Employment in Basildon Borough

B.1.50. Figure B.14 and Table B.19 look at VAT registrations per thousand head of population in Basildon Borough and the wider areas. This produces comparable levels of enterprise for each area as it takes account of the number of people living within each area.

B.1.51. Figure B.14 indicates that the overall level of entrepreneurial activity in the local authority area has been consistently below that of Essex, East of England and England and Wales from 2004 until it changes in 2010. Table B.19 shows that entrepreneurial activity is stronger in Basildon Borough in *construction* (1.27 registrations per thousand) and *real estate, renting and business activities* (2.77 registrations per thousand) than in the wider area.

Figure B.14 – VAT Registrations per Thousand of Working Age Population



Source: ATKINS; Census 2001; VAT Registrations and Deregistration; NOMIS

Table B.19 – VAT Registrations per Thousand of Working Age Population by Sector (2007)[42]

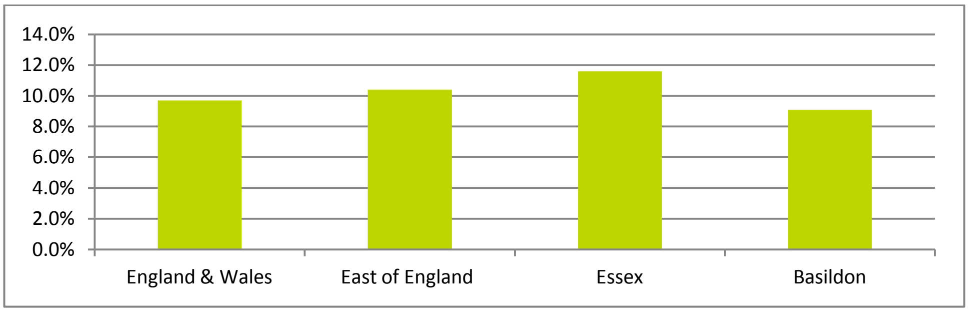
Broad Sector	Basildon Borough	Essex	East of England	England & Wales
Agriculture; Forestry and fishing	0.06	0.08	0.10	0.09
Mining and quarrying; Electricity, gas and water supply	-	-	0.01	0.00
Manufacturing	0.35	0.30	0.28	0.27
Construction	1.27	1.02	0.84	0.67
Wholesale, retail and repairs	0.98	0.83	0.84	0.89
Hotels and restaurants	0.46	0.48	0.46	0.47
Transport, storage and communication	0.35	0.27	0.26	0.22
Financial intermediation	0.06	0.04	0.04	0.05
Real Estate, renting and business activities	2.77	2.42	2.36	2.36
Public administration; Other community, social and personal services	0.23	0.27	0.28	0.28
Education; health and social work	0.06	0.07	0.08	0.09
Total	**6.59**	**5.78**	**5.53**	**5.38**

Source: Atkins; Census 2001; VAT Registrations and Designations; NOMIS

B.1.52. Another useful indicator of enterprise activity is the level of self-employment in an area. Figure B.15 shows the proportion of the working age population that were self-employed in Basildon Borough, Essex, the East of England and England & Wales in 2011–2012. Based on the information in the Annual Population Survey the level of self-employment is lower in Basildon Borough than in the wider areas, indicating that enterprise levels are weak. This is in-line with the VAT per capita analysis (above).

[42] VAT registrations broken down by industry groups is not available beyond 2007

Figure B.15 – Self Employed (Jul2011-Jun2012)



Source: NOMIS - Annual Population Survey

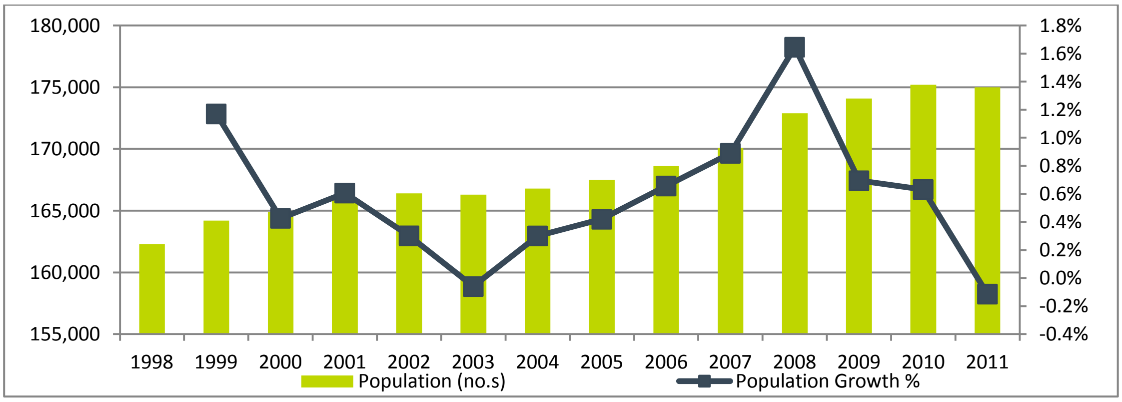
Population and Labour Market

Population and Labour Market in Basildon Borough

B.1.53. This section refers to the resident population in the study area (i.e. those living in the study area). In 2011 the population of Basildon Borough reached approximately 175,000, an increase of 5.5% since 2001 when population stood at 165,900. Population growth in Basildon Borough (5.5%) has been considerably slower than both regionally (8.6%) and nationally (7.3%), as shown in Table B.20. The bulk of the decline in Basildon Borough came between 2000 and 2003.

B.1.54. It will be important to ensure that the population growth anticipated for Basildon Borough over the next decade is matched by a commensurate increase in local job opportunities. This will be particularly important in encouraging a sustainable and balanced local economy in the Borough.

Figure B.16: Total Population in Basildon Borough



Source: Mid-year Population Estimates; NOMIS

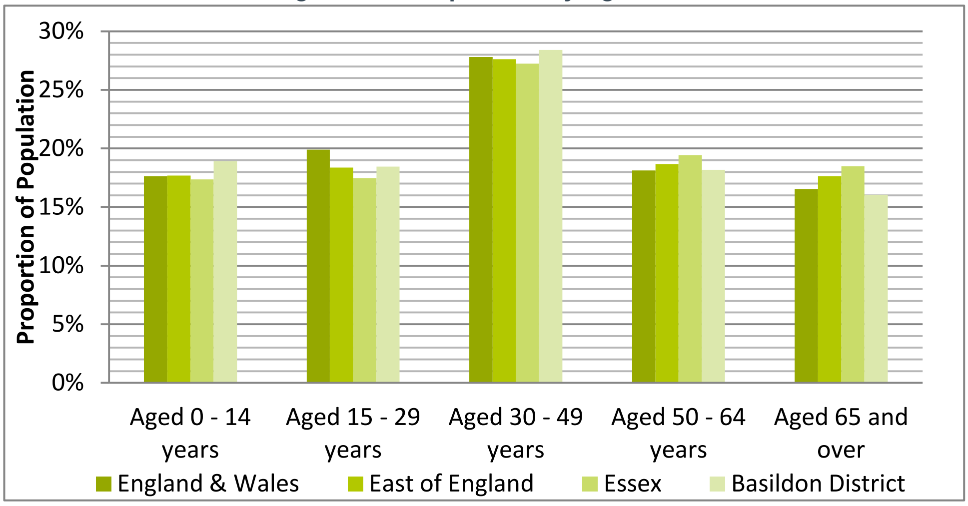
Table B.20: Population Growth Rates

1998 - 2011	Average Annual Growth%	% Growth (Decadal 2001-2011)
England & Wales	0.64%	7.3%
East of England	0.78%	8.6%
Essex	0.65%	6.4%
Basildon Borough	0.58%	5.5%

Source: Mid-year Population Estimates; NOMIS

B.1.55. Figure B.17 shows that the age of the population in Basildon Borough is similar to the wider areas. In the local authority, 28.4% of the population are aged between 30 and 49 years which compares to 27.6% in the East of England and 27.8% nationally.

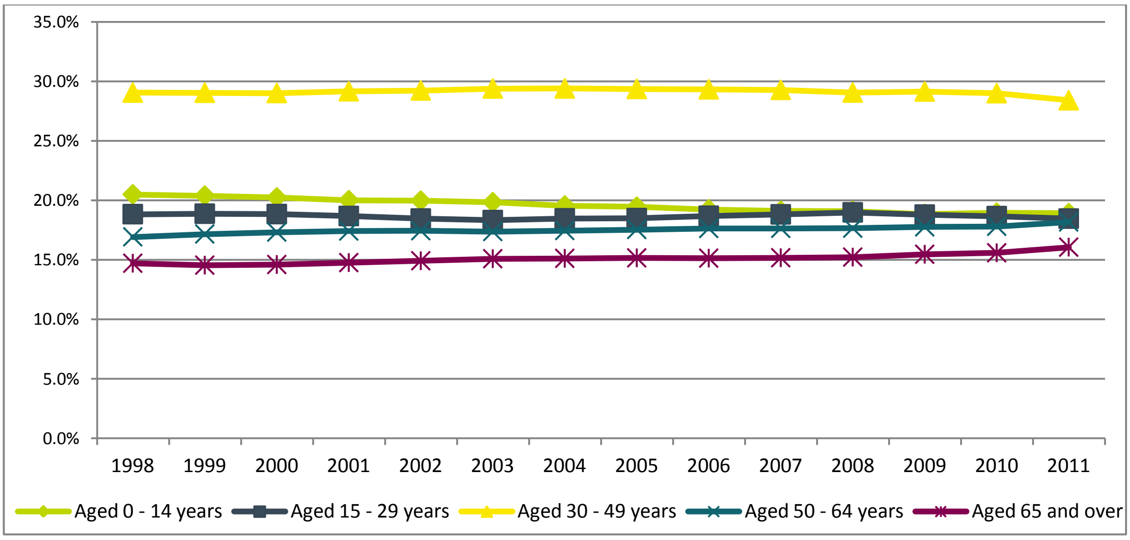
Figure B.17: Population by Age Band



Source: Mid-year Population Estimates; NOMIS

B.1.56. Figure B.18 shows that between 1998–2011 for all age groups the share of the population has remained similar. The proportion of 15–29 year olds has peaked in 2008 over the decade in the local authority, but has since declined marginally in 2008 to 18.5% in, which is similar to levels which existed in 1998 at 18.8%. Over the period 2008-2011 has a slight rise in Aged population above 50 years.

Figure B.18: Population in Basildon Borough by Age Band



Source: Mid-year Population Estimates; NOMIS

Working Age Population

B.1.57. As discussed above, the number of 15-29 year olds grew slightly from 1998 to peak in 2008, but has since stabilised. This is reflected in all four of the geographic regions in Table B.21, which shows that the proportion of the population of working age in 2008 is marginally above the level achieved in 1998. The working age population has declined in Basildon Borough (-0.2%), which is reflected in county levels, which declined by -0.4% but contrasts to the marginal rise at a national level.

Table B21: Working Age Population

	1998	2001	2004	2007	2011	% change 2001 – 2011
England & Wales	64.8%	65.3%	65.8%	66.3%	65.8%	0.5%
East of England	64.6%	64.7%	64.9%	65.3%	64.7%	0.0%
Essex	64.6%	64.5%	64.6%	65.0%	64.1%	-0.4%
Basildon Borough	64.8%	65.2%	65.1%	65.7%	65.0%	-0.2%

Source: NOMIS mid-year population estimates

Economic Activity

B.1.58. The level of economic activity, often referred to as the available workforce, is the sum of working age population who are either in employment, or registered as unemployed. The economic activity rate is calculated by the quotient of workforce to working age population, and can be regarded as a measure of economic participation. Table B.22 details economic activity levels and rates for Basildon Borough and the wider areas.

B.1.59. The number of economically active residents increased by 4.4% in Basildon Borough and between 2004 and 2012. This was a lower rate than for the overall working age population which declined by -0.2%.

B.1.60. The level of economic activity in Basildon Borough is considerably above of that of the East of England and England & Wales where the economic activity rate increased only slightly over the same period.

Table B.22: Economic Activity

Area	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	% change 2004 - 2012
England & Wales	76.4	76.5	76.6	76.6	76.7	76.3	76.1	76.5	0.1
East of England	79.6	79.2	78.6	78.9	79.5	78.8	78.9	79.6	0.0
Essex	79.6	78.4	78.3	79.1	78.7	78.2	78.7	79.5	-0.1
Basildon Borough	78.4	79.4	79.2	78.4	75.4	80.1	78.6	82.8	4.4

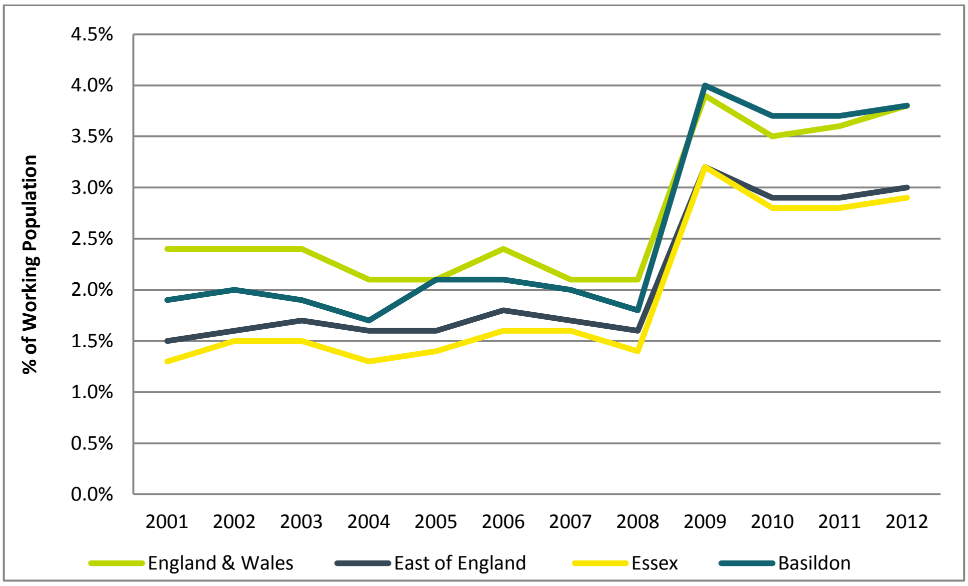
Source: NOMIS Annual Population Survey (July-June data)

Unemployment

B.1.61. Figure B.19 shows the percentage of people claiming out-of-work benefits providing an indicator for unemployment. The percentage of the working age population claiming out-of-work benefits is at 3.8% in Basildon Borough.

B.1.62. Figure B.19 shows unemployment through the claimant count measure, which looks at the percentage of the working age population claiming unemployment benefit. The measures show a downward trend in unemployment in both Basildon Borough and in the wider areas between 2004 and 2008, but unemployment is rising again as a result of the economic downturn. Throughout the period 2004–2009 unemployment in Basildon has consistently been marginally above the region and grows to above the region post 2009.

Figure B.19: Claimant Count Rate (June)



Source: Claimant Count; NOMIS

Wages

B.1.63. Table B.23 shows the median level of gross weekly pay in Basildon Borough, the East of England and England & Wales. It shows that both the residence-based and workplace-based weekly pay in the Borough is above the regional and national averages.

B.1.64. Residence-based pay in Basildon Borough (that is, the weekly pay for those living in Basildon Borough but not necessarily working there) is slightly above workplace-based pay (that is, for people working in the study area). This indicates that there is a slight pattern of out-commuting by Basildon Borough residents to better-paid jobs in other neighbouring areas.

Table B.23: Gross Weekly Pay £ (median, full time workers)

	Basildon Borough		East of England		England & Wales	
	Residence Based	Workplace Based	Residence Based	Workplace Based	Residence Based	Workplace Based
2002	454	421	416	393	395	394
2003	470	484	432	408	409	408
2004	458	471	448	419	423	423
2005	483	482	457	428	435	434
2006	489	487	466	441	448	447
2007	491	516	480	451	460	460
2008	507	477	499	469	482	481
2009	521	500	510	479	493	492
2010	539	481	523	489	504	502
2011	553	529	529	495	504	504

Source: Annual Survey of Hours and Earnings

Occupational Profile

B.1.65. Table B.24 shows the occupational profile for Basildon Borough, the County, Region and England & Wales at 2001. (More recent data from the Labour Force Survey is not available due to the data for the study area being statistically unreliable). The local authority area has a relatively lower proportion of the economically active population employed as managers and senior officials, as well as associate professional and technical occupations. In contrast it has a higher proportion of administrative and secretarial occupations.

Table B.24: Occupational Profile

Type of job	Basildon Borough	Essex	East of England	England & Wales
Managers and Senior Officials	14.8%	16.7%	16.3%	15.1%
Professional Occupations	8.4%	9.9%	10.8%	11.2%
Associate Professional and Technical Occupations	12.6%	13.8%	13.5%	13.8%
Administrative and Secretarial Occupations	17.1%	15.2%	13.7%	13.3%
Skilled Trades Occupations	12.0%	12.1%	12.1%	11.6%
Personal Service Occupations	5.9%	6.7%	6.7%	6.9%
Sales and Customer Service Occupations	8.0%	7.2%	7.3%	7.7%
Process, Plant and Machine Operatives	8.9%	7.6%	8.1%	8.5%
Elementary Occupations	12.3%	10.7%	11.5%	11.9%
Total	**100%**	**100%**	**100%**	**100%**

Source: Census 2001; NOMIS

Qualifications

B.1.66. Table B.25 looks at the qualification levels of Basildon Borough working age residents compared to the wider areas. The local authority areas has a under qualified resident workforce. Basildon Borough had the highest proportion of the resident workforce qualified to below NVQ level 2 out of the four study areas and has the lowest proportion with level 4/5 qualifications.

Table B.25: Qualifications as a Percentage of the Relevant Working Age Population (2001)

Type of job	No Qualifications	Qualified to NVQ L1	NVQ L2 Qualifications	NVQ L3 Qualifications	NVQ L4 Qualifications or Above
Basildon Borough	32.2%	21.3%	21.0%	6.5%	11.6%
Essex	28.7%	19.3%	21.3%	7.7%	15.5%
East	27.9%	18.2%	20.5%	7.9%	18.1%
England & Wales	29.1%	16.6%	19.4%	8.3%	19.8%

Source: Department for Children, Schools and Families (Annual Population Survey)

B-class Activities and SICs

B.1.67. **B Use class activities** are catergorised as follows:

Class B1 – Business - Use for all or any of the following purposes:

(a) as an office other than a use within Class A2 (financial and professional services),

(b) for research and development of products or processes, or

(c) for any industrial process,

(d) being a use which can be carried out in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit.

Class B2 – General Industrial - Use for the carrying on of an industrial process other than one falling within Class B1 above.

Class B8 – Storage or distribution – Use for storage or as a distribution centre.

B.1.68. **Standard Industrial Classification (SIC) -** is used to classify business establishments and other statistical units by the type of economic activities they are engaged in, as set out in Table B.39 to Table B.26.

Table B.26: B-Use Class Activities

B – Class uses	Activities (1992 SIC)		Activities (2007 SIC)	
Manufacturing	15	manufacture of food and beverage	10	Manufacture of food products
	16	manufacture of tobacco products	11	Manufacture of beverages
	17	manufacture of textiles	12	Manufacture of tobacco products
	18	manufacture of apparel	13	Manufacture of textiles
	19	tanning and dressing of leather	14	Manufacture of wearing apparel
	20	manufacture of wood products	15	Manufacture of leather and related products
	21	manufacture of pulp paper and paper products	16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
	22	publishing and printing	17	Manufacture of paper and paper products
	23	manufacture of coke and petroleum	18	Printing and reproduction of recorded media
	24	manufacture of chemicals and chemical products	19	Manufacture of coke and refined petroleum products
	25	manufacture of rubber and plastics	20	Manufacture of chemicals and chemical products
	26	manufacture of other non metallic mineral products	21	Manufacture of basic pharmaceutical products and pharmaceutical preparations
	27	manufacture of basic metals	22	Manufacture of rubber and plastic products
	28	manufacture of fabricated metal products	23	Manufacture of other non-metallic mineral products
	29	Manufacture of machinery & equipment	24	Manufacture of basic metals
	30	Manufacture office machines & computer	25	Manufacture of fabricated metal products, except machinery and equipment
	31	Manufacture of electrical machinery	26	Manufacture of computer, electronic and optical products
	32	Manufacture of television & line telephone	27	Manufacture of electrical equipment
	33	Manufacture of medical & optical instruments	28	Manufacture of machinery and equipment n.e.c.
	34	Manufacture of motor vehicles & trailers	29	Manufacture of motor vehicles, trailers and semi-trailers
	35	Manufacture of other transport equipment	30	Manufacture of other transport equipment
	36	Manufacture of furniture & Manufacture not elsewhere classified	31	Manufacture of furniture
	37	Recycling	32	Other manufacturing
			33	Repair and installation of machinery and equipment
Water supply, sewerage, waste management and remediation	90	Sewage & refuse disposal	37	Sewerage
			38	Waste collection, treatment and disposal activities; materials recovery
			39	Remediation activities and other waste management services
Construction	45	Construction	41	Construction of buildings
			42	Civil engineering
			43	Specialised construction activities
Wholesale and retail trade	50	Sale maintenance motor vehicle	45	Wholesale and retail trade and repair of motor vehicles and motorcycles
	51	Wholesalers trade & commission	46	Wholesale trade, except of motor vehicles and motorcycles
Transport Storage and Communication	60	Land transport	49	Land transport
	61	Water transport	50	Water transport
	62	Air transport	51	Air transport
	63	Supporting & auxiliary transport	52	Supporting & auxiliary transport
	64	Post & telecommunications	53	Postal and courier activities
Information and communication	72	Computer & related activities	58	Publishing activities
			59	Motion picture, video and television programme activities
			60	Programming and broadcasting activities
			61	Telecommunications
			62	Computer programming, consultancy and related activities

B – Class uses	Activities (1992 SIC)		Activities (2007 SIC)	
			63	Information service activities
Finance and Insurance	65	Financial intermediation	64	Financial service activities, except insurance and pension funding
	66	Insurance & pension funding	65	Insurance & pension funding
	67	Activities auxiliary to finance	66	Activities auxiliary to financial services and insurance activities
Real estate	70	Real estate activities	68	Real estate activities
Professional, Scientific and technical activities	73	Research & development	69	Legal and accounting activities
	74	Other business activity	70	Activities of head offices; management consultancy activities
			71	Architectural and engineering activities; technical testing and analysis
			72	Scientific research and development
			73	Advertising and market research
			74	Other professional, scientific and technical activities
Administrative and Support Service activities			77	Rental and leasing activities
			78	Employment activities
			79	Travel agency, tour operator and other reservation service and related activities
			80	Security and investigation activities
			81	Services to buildings and landscape activities
			82	Office administrative, office support and other business support activities
other services	91	Activities membership organisations	94	Activities of membership organisations
	92	Recreational cultural & sport	95	Repair of computers and personal and household goods

Appendix C. Business Survey

Introduction

C.1.1. Atkins was commissioned to undertake an Employment Land and Premises Study of Basildon Borough, with regard to the supply and demand of employment land. As part of this study, a business survey was conducted with local businesses.

C.1.2. The main objective of the survey was to provide a statistically significant, empirical basis for assessing future business needs in Basildon Borough, having particular regard to requirements for employment land and premises. In accordance with best-practice, the business survey provides an important strand of analysis used to inform our assessment of future employment land and floorspace requirements in both local authority areas.

C.1.3. This Appendix sets out the detailed tables and a summary of the findings of the business survey and is presented as an appendix to the main study report. Some questions were not relevant to all businesses, where this is the case the number of respondents is stated below the summary table, for all other tables it should be assumed that all businesses responded.

C.1.4. The Appendix is structured into the following Sections:

- Methodology.
- Survey sample details.
- Survey results.
- Summary of business survey results.
- Total expansion requirements: survey-based forecasts.
- Full survey results: tables.

Methodology

C.1.5. A survey of indigenous businesses within Basildon Borough was conducted (December 2012) in order to provide a statistically significant assessment of needs amongst the business community. This provides an empirical source of data which can be used to supplement analysis provided by the manipulation of secondary data sources.

C.1.6. The key topics researched included:

- Employment information;
- Type of ownership;
- Size of premises;
- Land and premises requirements; and
- Future plans, including expansion and relocation.

Survey Process

C.1.7. The information was collected through a series of 15 minute interviews with 251 businesses located within the study area. Interviews were conducted with owners, managers and directors.

Survey Sample

C.1.8. The sample frame was taken from the Annual Business Inquiry whilst the sample itself was drawn from the Experian business database. It is important to highlight that the sample included private sector business types only, likely to accommodate B-use class floorspace.

C.1.9. The survey was carried out with 251 businesses, representing nearly 13% of all B-use class businesses in the study area. Six industry sectors, three size bands and three sub-regions were devised. The sectors were:

- B-use manufacturing;
- B-use construction;
- B-use distribution & wholesale;
- B-use transport & communications;
- B-use banking, finance & insurance; and
- B-use other services.

C.1.10. The business size bands[43] were:

- Small (1 – 10 employees);
- Medium (11 - 199 employees); and
- Large (200 + employees).

C.1.11. The sub-regions were based on post code district areas that have been grouped as follows:

- Basildon;
- Billericay; and
- Wickford.

Survey Outputs

C.1.12. The remainder of this report details the main findings from the telephone surveys. The results shown here are not weighted.

C.1.13. The findings have been analysed by industry sector and company size (in terms of the number of employees) where appropriate.

C.1.14. It should be noted that for questions that were not asked to the entire sample population, the number of responses for certain sectors of business sizes may be small. Care should therefore be taken when interpreting such results.

Survey Sample Details

C.1.15. The following table C.1 set out the survey sample population by industry and by size of business and location. The proportion of small businesses surveyed was reduced from their actual proportion in the economy to ensure that a significant number of medium and large businesses could be surveyed. Overall however, the tables below confirm that the representation of each sector and business size in the survey sample was broadly in line with that of the study area.

[43] N.B the bands used in the socio-economic assessment vary slightly as a result of availability of data.

Table C.1: Survey Sample Details

	Total Businesses		Survey Interview	
	No.	% of Total	No.	% of Total
By Sector				
Manufacturing – SICs 10 -33	338	17%	46	18%
Water supply, sewerage, waste management and remediation SICs 37 – 39	26	1%	3	1%
Construction – SIC 41 – 43	381	19%	47	19%
Wholesale and retail trade – SIC 45 – 46	226	11%	32	13%
Transportation and Storage – SIC 49 – 53	219	11%	27	11%
Information and communication - SIC 58 – 63	78	4%	9	4%
Finance and Insurance + Real estate – SIC 64 – 68	128	6%	13	5%
Professional, Scientific and technical activities - SICs 69 – 74	277	14%	34	14%
Administrative and Support Service activities 77 – 82	282	14%	34	14%
Other Services – SIC 94 – 95	53	3%	6	2%
Total[44]	2,008	100%	251	100%
By Size				
1 – 10	1,463	73%	182	73%
11 – 199	409	20%	53	21%
200 +	136	7%	16	6%
Total[45]	2,008	100%	251	100%
By Location				
Basildon	1,161	58`%	148	59%
Billericay	417	21%	48	19%
Wickford	434	22%	55	22%
Total[46]	**2,012**	**100%**	**251**	**100%**

[44] Excludes 16 unclassified sites

[45] Excludes 16 unclassified sites

[46] Excludes 12 sites in ‘other’ locations

Summary of Business Survey Results

C.1.16. On average 64% of surveyed businesses' employees live within 10 miles of the business. Most notably, businesses located in Basildon had the highest proportion of locally based employees, averaging 66% and Wickford the lowest, averaging only slightly less at 60%.

C.1.17. On average, 83% of employees in the study area travel to work by car. Walking is the second most popular mode of transport with 11% of employees travelling to work on foot. Use of public transport is fairly limited with an average of 3% using train, and 2% travelling by bus. 1% cycle to work. Basildon and Wickford have the highest proportion of car use with each averaging 84% of employees driving to work. Car use is lowest in Billericay (77%).

C.1.18. In terms of businesses' customers, on average 31% are located within Basildon Borough. This is highest for businesses located in Wickford (34%) and those in other services (76%) and finance, insurance and real estate (64%). As might be expected small businesses tend to have a more localised customer base and have the highest average proportion of customers from the Borough, at 35%.

C.1.19. Although on average only 31% of customers are based in the Borough, the proportion of customers based in Essex as a whole is the same with an average of 31%. This is highest for businesses located in Billericay and in the water supply, sewage, waste management and remediation sector. Business in Wickford has a large proportion of customers (22% on average) that are based in London.

C.1.20. 27% of surveyed businesses have been established in Basildon Borough for over twenty years. Generally the larger the business the longer the business has been established in the area for, indicating a strong trend for indigenous business growth as opposed to inward investment. Wickford and Billericay have the highest proportion of businesses that have been established for more than 20 years.

Table C.2: Local Linkages

	% of employees living within 10 miles	% of Customers based in Basildon Borough	% of customers based in Essex
By Sector			
Manufacturing – SICs 10 -33	68%	66%	88%
Water supply, sewerage, waste management and remediation SICs 37 – 39	83%	67%	100%
Construction – SIC 41 – 43	57%	70%	87%
Wholesale and retail trade – SIC 45 – 46	64%	77%	87%
Transportation and Storage – SIC 49 – 53	65%	77%	88%
Information and communication - SIC 58 – 63	56%	75%	100%
Finance and Insurance + Real estate – SIC 64 – 68	65%	100%	60%
Professional, Scientific and technical activities - SICs 69 – 74	62%	68%	79%
Administrative and Support Service activities 77 – 82	66%	88%	85%
Other Services – SIC 94 – 95	58%	100%	83%
Total	**64%**	**75%**	**85%**
By Size			
1 – 10	57%	78%	87%
11 – 199	82%	68%	85%
200 +	78%	62%	69%
Total	**64%**	**75%**	**85%**
By Location			
Basildon	66%	77%	84%
Billericay	59%	70%	89%
Wickford	60%	75%	87%
Total	**64%**	**75%**	**85%**

Current Business Premises

C.1.21. Freehold is the most common form of tenure, with 36% of respondents occupying their premises on this basis, followed by leasehold with 23 % of respondents. Basildon, Billericay and Wickford have the highest proportion of leasehold businesses (26%, 27% and 27% respectively). Over a quarter (30%) of micro businesses either work from home or through mobile working. The information and communication sector is the most likely to have businesses based at home, with 78% of respondents working from home.

C.1.22. The average premises size of survey respondents was 1,728sqm. Businesses of 11 – 199 employees have the biggest average premises size (1,167sqm) followed by businesses with 200 + employees (4,291sqm). The finance, insurance and real estate sector achieved the largest average premises, although this was for a single premises (83,613sqm). This was followed by the transport and storage sector with an average premise size of 2,257sqm. The smallest premises size was for other services sector (50sqm).

C.1.23. Satisfaction with current business premises was very high with only 5% of respondents stating that their current business premises were unsuitable for the ongoing operation of their business. There was no difference by location whether businesses considered their premises to be unsuitable. Those based in Billericay and large businesses were most likely to think that their premises were very suitable.

C.1.24. The main reason given for current premises being unsuitable was that the site/premises were too small; this was particularly an issue for those businesses in Basildon and Wickford that thought their premises were unsuitable. Other notable reasons were old and/or poor condition of premises and that premises was based in their home.

Expansion Plans

C.1.25. Of surveyed businesses, 31% said their businesses were planning to expand. 56% of surveyed information and communication services said that they were planning to expand, those businesses in the manufacturing sector have the lowest proportion of businesses that say that they would expand and this sector also has the highest proportion of businesses that say they may downsize. On the whole the larger the business the more likely they were to be planning to expand.

Table C.3: Expansion Plans

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Manufacturing – SICs 10 -33	16	35%	29	63%	1	2%	46	100
Water supply, sewerage, waste management and remediation SICs 37 – 39	1	33%	2	67%	0	0%	3	100
Construction – SIC 41 – 43	12	26%	34	72%	1	2%	47	100
Wholesale and retail trade – SIC 45 – 46	8	25%	23	72%	1	3%	32	100
Transportation and Storage – SIC 49 – 53	10	37%	15	56%	2	7%	27	100
Information and communication - SIC 58 – 63	5	56%	4	44%	0	0%	9	100
Finance and Insurance + Real estate – SIC 64 – 68	1	8%	12	92%	0	0%	13	100
Professional, Scientific and technical activities - SICs 69 – 74	8	24%	25	74%	1	3%	34	100
Administrative and Support Service activities 77 – 82	15	44%	17	50%	2	6%	34	100
Other Services – SIC 94 – 95	1	17%	4	67%	1	17%	6	100
Total	**77**	**31%**	**165**	**66%**	**9**	**4%**	**251**	**100**
By Size								
1 – 10	55	30%	119	65%	8	4%	182	100
11 – 199	18	34%	34	64%	1	2%	53	100
200 +	4	25%	12	75%	0	0%	16	100
Total	**77**	**31%**	**165**	**66%**	**9**	**4%**	**251**	**100**
By Location								
Basildon	48	32%	94	64%	6	4%	148	100
Billericay	14	29%	34	71%	0	0%	48	100
Wickford	15	27%	37	67%	3	5%	55	100
Total	**77**	**31%**	**165**	**66%**	**9**	**4%**	**251**	**100**

C.1.26. Almost half of those planning to expand (47%) said that their plans would create a need for additional floorspace. On average 147sqm of additional floorspace was expected to be needed to accommodate expansion plans.

C.1.27. Over half of the respondents (61%) said they would not be able to accommodate their additional floorspace needs on their existing site/premises (either through extension, refurbishment, redevelopment or more intensive use).

Relocation

C.1.28. Of surveyed businesses, 15% have considered relocating. Small and medium sized businesses are most likely to have considered relocating, whilst businesses in Billericay, and those in the information and communication sector and other services sector are most likely to have considered relocating. Of those that have considered relocating, 18% have considered a location within Brentwood and 11% have considered relocating in Chelmsford.

C.1.29. Of those who have considered relocating, the preferred types of locations are a dedicated industrial area (39%). Around two-thirds of businesses think that the type of premises that they are after is available in Basildon whilst only 16% think that it isn't, with the remainder uncertain.

Total Expansion Requirements: Survey Based Forecasts

C.1.30. Using data from the Annual Business Inquiry we can provide indicative estimates of the total number of B-use class businesses in Basildon Borough by size. By applying the sample results to reflect the total number of B-use class businesses, estimates can be provided of the total expansion requirements of indigenous businesses in the study area.

C.1.31. In order to calculate a forecast of future demand, floorspace requirements are calculated based on only those respondents who said that they would definitely be expanding and would need additional floor space. The figures are then further analysed using data from the questions on floorspace requirements, and relocation questions (in order to avoid over estimating potential floorspace requirements the largest outliers were removed).

C.1.32. Table C.4, uses the average floor space requirement figure from the survey for small businesses (122sqm) and 235sqm for medium and large business, equating to an overall average of 144sqm for Basildon Borough.

Table C.4: Expansion Floorspace Requirements (sq.m)

Area	Size of Business		Total
	Small	Medium & large	
Basildon Borough	100,705	11,119	111,824

C.1.33. The forecast gives a floorspace requirement of approximately 111,824 sq.m for Basildon Borough.

C.1.34. It is important to highlight three key factors when looking at the estimates set out above.

- The estimates exclude B-use class requirements of public sector organisations.
- The estimates refer only to the additional floor space requirements of indigenous businesses.
- The potential requirements of inward investors to the study area are not included.
- The estimates are solely based on business survey responses and are likely to include a high degree of optimism. Therefore these figures only inform our floor space forecasts and as such should be read with consideration to the full forecast analysis as set out in the appendices.

Full Business Survey Results: Tables

A: Business

Question A2: Approximately how many people do you employ?

Table C.5: Average Number of Employees

	Average no. employees	No. respondents
By Sector		
Manufacturing – SICs 10 -33	30	46
Water supply, sewerage, waste management and remediation SICs 37 – 39	19	3
Construction – SIC 41 – 43	9	47
Wholesale and retail trade – SIC 45 - 46	196	32
Transportation and Storage – SIC 49 – 53	22	27
Information and communication - SIC 58 – 63	9	9
Finance and Insurance + Real estate – SIC 64 – 68	4,457	13
Professional, Scientific and technical activities - SICs 69 – 74	14	34
Administrative and Support Service activities 77 – 82	713	34
Other Services – SIC 94 – 95	2	6
Total	**364**	**251**
By Size		
1 – 10	3	182
11 – 199	33	53
200 +	5,569	16
Total	**364**	**251**
By Location		
Basildon	104	148
Billericay	380	48
Wickford	1,051	55
Total	**364**	**251**

Question A3: What Proportion of your employees come from the following distances?

Table C.6: Travel to Work Distance

	Average proportion of employees (%)				
	0-4 miles	5-10 miles	11 – 15 miles	16 – 20 miles	20 + miles
By Sector					
Manufacturing – SICs 10 -33	58	24	7	8	2
Water supply, sewerage, waste management and remediation SICs 37 – 39	75	15	5	5	0
Construction – SIC 41 – 43	61	18	11	3	7
Wholesale and retail trade – SIC 45 – 46	56	17	16	3	8
Transportation and Storage – SIC 49 – 53	49	23	18	8	3
Information and communication - SIC 58 – 63	89	3	2	5	0
Finance and Insurance + Real estate – SIC 64 – 68	74	7	16	3	0
Professional, Scientific and technical activities - SICs 69 – 74	49	18	12	11	11
Administrative and Support Service activities 77 – 82	55	25	10	9	0
Other Services – SIC 94 – 95	58	42	0	0	0
Total	**58**	**20**	**11**	**7**	**5**
By Size					
1 – 10	62	18	10	6	5
11 – 199	45	27	17	8	5
200 +	59	22	9	8	2
Total	**58**	**20**	**11**	**7**	**5**
By Location					
Basildon	54	21	13	6	5
Billericay	62	19	11	8	0
Wickford	64	17	8	7	6
Total	**58**	**20**	**11**	**7**	**5**

Question A4: What proportion of your employees travel by the following modes of transport?

Table C.7: Travel to Work Mode

	Average proportion of employees (%)				
	Car	Bus	Train	Walk	Cycle
By Sector					
Manufacturing – SICs 10 -33	88	4	1	6	1
Water supply, sewerage, waste management and remediation SICs 37 – 39	75	2	3	20	0
Construction – SIC 41 – 43	87	0	2	12	0
Wholesale and retail trade – SIC 45 – 46	87	3	1	8	2
Transportation and Storage – SIC 49 – 53	84	3	0	9	1
Information and communication - SIC 58 – 63	18	4	0	78	0
Finance and Insurance + Real estate – SIC 64 – 68	71	5	4	18	2
Professional, Scientific and technical activities - SICs 69 – 74	88	0	4	4	4
Administrative and Support Service activities 77 – 82	88	3	2	4	3
Other Services – SIC 94 – 95	50	17	0	33	1
Total	**83**	**3**	**2**	**11**	**1**
By Size					
1 – 10	80	3	1	14	2
11 – 199	91	1	2	4	2
200 +	89	4	5	2	0
Total	**83**	**3**	**2**	**11**	**1**
By Location					
Basildon	84	4	1	9	1
Billericay	77	1	2	19	0
Wickford	84	1	4	9	3
Total	**83**	**3**	**2**	**11**	**1**

Question A5: What proportion of your main customers come from the follow locations?

Table C.8: Location of Main Customers

	Basildon	Rest of Essex	London	Rest South East	Rest UK	International
By Sector						
Manufacturing – SICs 10 -33	22	34	17	14	10	3
Water supply, sewerage, waste management and remediation SICs 37 – 39	28	63	8	0	0	0
Construction – SIC 41 – 43	26	46	21	5	1	1
Wholesale and retail trade – SIC 45 - 46	35	22	10	10	14	9
Transportation and Storage – SIC 49 – 53	31	17	9	18	19	9
Information and communication - SIC 58 – 63	19	39	21	13	8	1
Finance and Insurance + Real estate – SIC 64 – 68	64	14	16	5	7	0
Professional, Scientific and technical activities - SICs 69 – 74	22	28	24	8	12	6
Administrative and Support Service activities 77 – 82	43	36	12	4	4	2
Other Services – SIC 94 – 95	76	9	8	3	3	0
Total	**31**	**31**	**16**	**9**	**9**	**4**
By Size						
1 – 10	35	34	14	7	10	3
11 – 199	18	26	22	16	7	5
200 +	31	17	21	6	8	11
Total	**31**	**31**	**16**	**9**	**9**	**4**
By Location						
Basildon	33	28	15	10	7	5
Billericay	24	45	14	8	13	3
Wickford	34	28	22	7	13	4
Total	**31**	**31**	**16**	**9**	**9**	**4**

Question A6: How long has your operation been established in Basildon Borough?

Table C.9: Length of Time in Basildon Borough

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Manufacturing – SICs 10 - 33	3	7%	13	28%	10	22%	7	15%	2	4%	10	22%	1	2%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 - 39	0	0%	0	0%	0	0%	2	67%	0	0%	1	33%	0	0%	3	100%
Construction – SIC 41 – 43	3	6%	17	36%	9	19%	5	11%	2	4%	10	21%	1	2%	47	100%
Wholesale and retail trade – SIC 45 - 46	0	0%	7	22%	3	9%	5	16%	1	3%	16	50%	0	0%	32	100%
Transportation and Storage – SIC 49 – 53	0	0%	8	30%	6	22%	4	15%	5	19%	4	15%	0	0%	27	100%
Information and communication - SIC 58 – 63	1	11%	2	22%	3	33%	0	0%	2	22%	1	11%	0	0%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	1	8%	1	8%	1	8%	1	8%	8	62%	1	8%		100%
Professional, Scientific and technical activities - SICs 69 – 74	1	35	8	24%	10	29%	1	3%	5	15%	9	26%	0	0%	34	100%
Administrative and Support Service activities 77 – 82	3	9%	9	26%	6	18%	7	21%	3	9%	5	15%	1	3%	34	100%
Other Services – SIC 94 – 95	0	0%	1	17%	1	17%	1	17%	0	0%	3	50%	0	0%	6	100%
Total	**11**	**4%**	**66**	**26%**	**49**	**20%**	**33**	**13%**	**21**	**8%**	**67**	**27%**	**4**	**2%**	**251**	**100%**

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Size																
1 – 10	10	5%	55	30%	36	20%	23	13%	13	7%	41	24%	4	2%	182	100%
11 – 199	1	2%	10	19%	10	19%	9	17%	7	13%	16	27%	0	0%	53	100%
200 +	0	0%	1	6%	3	19%	1	6%	1	6%	10	35%	0	0%	16	100%
Total	**11**	**4%**	**66**	**26%**	**49**	**20%**	**33**	**13%**	**21**	**8%**	**67**	**27%**	**4**	**2%**	**251**	**100%**
By Location																
Basildon	8	5%	45	30%	25	17%	23	16%	11	7%	35	24%	1	1%	148	100%
Billericay	2	4%	9	19%	10	21%	6	13%	7	15%	13	27%	1	2%	48	100%
Wickford	1	2%	12	22%	14	25%	4	7%	3	5%	19	35%	2	4%	55	100%
Total	**11**	**4%**	**66**	**26%**	**49**	**20%**	**33**	**13%**	**21**	**8%**	**67**	**27%**	**4**	**2%**	**251**	**100%**

B: Premises

Question B1: How long has business operated out of the premises which you currently occupy?

Table C.10: Length of Time at Existing Premises

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Manufacturing – SICs 10 -33	3	7%	16	35%	12	26%	6	13%	1	2%	8	17%	0	0%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	2	67%	0	0%	1	33%	0	0%	3	100%
Construction – SIC 41 – 43	3	6%	21	45%	9	19%	2	4%	1	2%	7	15%	4	9%	47	100%
Wholesale and retail trade – SIC 45 – 46	0	0%	9	28%	4	13%	4	15%	0	0%	11	34%	1	3%	32	100%
Transportation and Storage – SIC 49 – 53	0	0%	9	33%	6	22%	4	0%	1	2%	2	7%	2	7%	27	100%
Information and communication - SIC 58 – 63	1	11%	3	33%	3	33%	0	0%	1	3%	0	0%	1	11%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	1	8%	3	23%	2	15%	4	15%	4	31%	1	8%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	1	3%	15	44%	9	26%	2	6%	1	11%	5	15%	0	0%	34	100%
Administrative and Support Service activities 77 – 82	2	6%	9	26%	2	6%	6	18%	2	15%	4	12%	9	26%	34	100%
Other Services – SIC 94 – 95	0	0%	2	33%	0	0%	0	0%	2	6%	3	50%	0	0%	6	100%
Total	**10**	**4%**	**85**	**34%**	**49**	**19%**	**30**	**12%**	**15**	**5%**	**45**	**18%**	**18**	**7%**	**251**	**100%**

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
By Size																
1 – 10	9	5%	85	34%	48	19%	20	11%	15	6%	29	16%	15	8%	182	100%
11 – 199	1	2%	68	37%	32	18%	8	15%	9	5%	10	19%	2	4%	53	100%
200 +	0	0%	15	28%	11	21%	2	13%	6	11%	6	38%	1	6%	16	100%
Total	**10**	**4%**	**85**	**34%**	**49**	**19%**	**30**	**12%**	**15**	**5%**	**45**	**18%**	**18**	**7%**	**251**	**100%**
Basildon	6	4%	57	39%	30	12%	20	14%	7	5%	25	17%	9	6%	148	100%
Billericay	3	6%	11	23%	20	11%	5	10%	5	10%	8	17%	5	10%	48	100%
Wickford	1	2%	17	31%	8	15%	5	9%	3	5%	12	22%	4	7%	55	100%
Total	**10**	**4%**	**85**	**34%**	**49**	**19%**	**30**	**12%**	**15**	**5%**	**45**	**18%**	**18**	**7%**	**251**	**100%**

Question B2: By What tenure do you occupy your premises?

Table C.11: Tenure of Premises

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don't know / no response		Rented		Total	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
By Sector																		
Manufacturing – SICs 10 - 33	14	30%	14	30%	1	2%	2	4%	0	0%	0	0%	6	13%	9	20%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	2	67%	1	33%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	100%
Construction – SIC 41 – 43	8	17%	11	23%	0	0%	13	28%	9	19%	0	0%	2	4%	4	9%	47	100%
Wholesale and retail trade – SIC 45 – 46	13	41%	8	25%	0	0%	1	3%	1	3%	0	0%	3	9%	6	19%	32	100%
Transportation and Storage – SIC 49 – 53	7	26%	7	26%	1	4%	2	7%	2	7%	0	0%	1	4%	7	26%	27	100%
Information and communication - SIC 58 – 63	0	0%	1	11%	0	0%	7	78%	0	0%	0	0%	0	0%	1	11%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	4	31%	0	0%	0	0%	0	0%	0	0%	0	0%	4	31%	5	38%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	10	29%	9	26%	1	3%	6	18%	0	0%	0	0%	1	3%	7	21%	34	100%
Administrative and Support Service activities 77 – 82	6	18%	5	15%	0	0%	5	15%	8	24%	0	0%	4	12%	6	18%	34	100%
Other Services – SIC 94 – 95	2	33%	1	17%	0	0%	0	0%	0	0%	0	0%	1	17%	2	33%	6	100%
Total	**66**	**36%**	**57**	**23%**	**3**	**1%**	**36**	**14%**	**20**	**8%**	**0**	**0%**	**22**	**9%**	**47**	**19%**	**251**	**100%**

	Freehold		Leasehold		License		Work from Home		Mobile Working		Other		Don’t know / no response		Rented		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Size																		
1 – 10	44	24%	35	19%	2	1%	35	19%	19	10%	0	0%	6	11%	36	20%	182	100%
11 – 199	20	38%	20	38%	1	2%	1	2%	0	0%	0	0%	5	31%	7	44%	53	100%
200 +	2	13%	2	13%	0	0%	0	0%	0	0%	0	0%	5	31%	7	44%	16	100%
Total	**66**	**36%**	**57**	**23%**	**3**	**1%**	**36**	**14%**	**20**	**8%**	**0**	**0%**	**22**	**9%**	**47**	**19%**	**251**	**100%**
By Location																		
Basildon	38	26%	34	23%	2	1%	19	13%	11	7%	0	0%	15	10%	29	20%	148	100
Billericay	13	27%	11	23%	1	2%	6	13%	5	10%	0	0%	3	6%	9	19%	48	100
Wickford	15	27%	12	22%	0	0%	11	20%	4	7%	0	0%	4	7$	9	16%	55	100
Total	**66**	**36%**	**57**	**23%**	**3**	**1%**	**36**	**14%**	**20**	**8%**	**0**	**0%**	**22**	**9%**	**47**	**19%**	**251**	**100%**

Question B2ii): For those that answered leasehold above what is the remaining length of lease?

Table C.12: Length of Lease Remaining

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																
Manufacturing – SICs 10 -33	2	14%	4	29%	0	0%	0	0%	1	7%	1	7%	6	43%	14	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	1	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0	1	100%
Construction – SIC 41 – 43	3	27%	2	18%	1	9%	0	0%	0	0%	2	18%	3	27%	11	100%
Wholesale and retail trade – SIC 45 – 46	2	25%	1	13%	3	38%	0	0%	0	0%	0	0%	2	25%	8	100%
Transportation and Storage – SIC 49 – 53	0	0%	3	43%	2	29%	0	0%	0	0%	0	0%	2	29%	7	100%
Information and communication - SIC 58 – 63	0	0%	1	100%	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	100%
Professional, Scientific and technical activities - SICs 69 – 74	4	44%	2	22%	2	22%	0	0%	0	0%	0	0%	1	11%	9	100%
Administrative and Support Service activities 77 – 82	2	40%	0	0%	0	0%	0	0%	0	0%	0	0%	3	60%	5	100%

	Less than 1 yr		1-5 yrs		6-10 yrs		11-15yrs		16 – 20 yrs		20 + yrs		Don't know / no response		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Other Services – SIC 94 – 95	0	0%	1	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	100%
Total	**14**	**25%**	**14**	**25%**	**8**	**14%**	**0**	**0%**	**1**	**2%**	**3**	**5%**	**17**	**30%**	**57**	**100%**
By Size																
1 – 10	8	23%	7	20%	7	20%	0	0%	0	0%	1	3%	12	34%	35	100%
11 – 199	5	25%	7	35%	1	5%	0	0%	1	5%	2	10%	4	20%	20	100%
200 +	1	50%	0	0%	0	0%	0	0%	0	0%	0	0%	1	50%	2	100%
Total	**14**	**25%**	**14**	**25%**	**8**	**14%**	**0**	**0%**	**1**	**2%**	**3**	**5%**	**17**	**30%**	**57**	**100%**
By Location																
Basildon	7	21%	8	24%	5	15%	0	0%	0	0%	1	3%	13	38%	24	100%
Billericay	3	27%	4	36%	1	9%	0	0%	0	0%	1	9%	2	18%	11	100%
Wickford	4	33%	2	17%	2	17%	0	0%	1	8%	1	8%	2	17%	12	100%
Total	**14**	**25%**	**14**	**25%**	**8**	**14%**	**0**	**0%**	**1**	**2%**	**3**	**5%**	**17**	**30%**	**57**	**100%**

Base: 57 respondents

Question B3: Roughly How much floorspace do your premises occupy?

Table C.13: Size of Premises

	0 - 100 sqm		101 – 250 sqm		250 – 500 sqm		501 – 1000 sqm		1000 + sqm		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector												
Manufacturing – SICs 10 -33	8	33%	5	21%	4	17%	4	17%	3	13%	24	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0$	0	0%	0	0%	0	0$	0	100%
Construction – SIC 41 – 43	7	47%	5	33%	1	7%	2	13%	0	0%	15	100%
Wholesale and retail trade – SIC 45 – 46	2	18%	4	36%	1	9%	3	27%	1	9%	11	100%
Transportation and Storage – SIC 49 – 53	2	18%	3	27%	2	18%	2	18%	2	18%	11	100%
Information and communication - SIC 58 – 63	1	33%	2	67%	0	0%	0	0%	0	0%	3	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	1	100%	1	100%
Professional, Scientific and technical activities - SICs 69 – 74	8	47%	1	6%	2	12%	0	0%	6	35%	17	100%
Administrative and Support Service activities 77 – 82	5	63%	1	13%	0	0%	0	0%	0	0%	8	100%
Other Services – SIC 94 – 95	1	100%	0	0%	0	0%	0	0%	0	0%	1	100%
Total	**34**	**37%**	**21**	**23%**	**10**	**11%**	**11**	**12%**	**15**	**16%**	**91**	**100%**

	0 - 100 sqm		101 – 250 sqm		250 – 500 sqm		501 – 1000 sqm		1000 + sqm		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Size												
1 – 10	30	50%	14	23%	6	10%	7	12%	3	5%	60	100%
11 – 199	4	15%	6	22%	4	15%	4	15%	9	33%	27	100%
200 +	0	0%	1	25%	0	0%	0	0%	3	75%	4	100%
Total	**34**	**37%**	**21**	**23%**	**10**	**11%**	**11**	**12%**	**15**	**16%**	**91**	**100%**
By Location												
Basildon	17	33%	10	20%	6	12%	9	18%	9	18%	51	100%
Billericay	10	56%	4	22%	3	17%	0	0%	1	6%	18	100%
Wickford	7	32%	7	32%	1	5%	2	9%	5	23%	22	100%
Total	**34**	**37%**	**21**	**23%**	**10**	**11%**	**11**	**12%**	**15**	**16%**	**91**	**100%**

Base: 91 respondents

Table C.14: Average Size of Premises

	Number Respondents	Average size (sqm)
By Sector		
Manufacturing – SICs 10 -33	24	831
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0
Construction – SIC 41 – 43	15	205
Wholesale and retail trade – SIC 45 – 46	11	384
Transportation and Storage – SIC 49 – 53	11	2,257
Information and communication - SIC 58 – 63	3	137
Finance and Insurance + Real estate – SIC 64 – 68	1	83,613
Professional, Scientific and technical activities - SICs 69 – 74	17	966
Administrative and Support Service activities 77 – 82	8	582
Other Services – SIC 94 – 95	1	50
Total	**91**	**1,728**
By Size		
1 – 10	60	253
11 – 199	27	6,167
200 +	4	4,291
Total	**91**	**1,728**
By Location		
Basildon	51	2,820
Billericay	18	176
Wickford	22	466
Total	**91**	**1,728**

Question B4: How suitable is your current premises / location for your business?

Table C.15: Suitability of Current Business Premises

	Very Suitable		Reasonably Suitable		Unsuitable		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Manufacturing – SICs 10 -33	42	91%	2	4%	2	4%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	2	67%	1	33%	0	0%	3	100%
Construction – SIC 41 – 43	40	85%	3	65	4	9%	47	100%
Wholesale and retail trade – SIC 45 – 46	26	81%	5	16%	1	3%	32	100%
Transportation and Storage – SIC 49 – 53	25	93%	0	0%	2	7%	27	100%
Information and communication - SIC 58 – 63	7	78%	2	22%	0	0%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	12	92%	1	8%	0	0%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	28	82%	5	15%	1	3%	34	100%
Administrative and Support Service activities 77 – 82	27	79%	4	12%	3	9%	34	100%
Other Services – SIC 94 – 95	5	83%	1	17	0	0%	6	100%
Total	**214**	**85%**	**24**	**10%**	**13**	**5%**	**251**	100%
By Size								
1 – 10	153	84%	19	10%	10	5%	182	100%
11 – 199	47	89%	5	9%	1	2%	53	100%
200 +	14	88%	0	0%	2	13%	16	100%
Total	**214**	**85%**	**24**	**10%**	**13**	**5%**	**251**	100%
By Location								
Basildon	130	88%	11	7%	7	5%	148	100%
Billericay	39	81%	6	13%	3	6%	48	100%
Wickford	45	82%	7	13%	3	5%	55	100%
Total	**214**	**85%**	**24**	**10%**	**13**	**5%**	**251**	100%

Question B5: What are the main factors contributing to unsuitability of premises?

Table C.16: Factors Contributing to Unsuitability of Premises

	Site/premises too small		Premises too old / in poor condition		It's my home		It's on the first floor / prefer ground floor		Prefer a high street location / need more footfall		High business rates		High rents		Poor image of site / premises		Poor local facilities / amenities		Layout not ideal		Poor site access		Poor public transport		Lack of car parking		Premises too large		Strict planning rules (in Green Belt)		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																																
Manufacturing – SICs 10 -33	3	75%	1	25%	0	0%	1	25%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	4	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%	1	100%
Construction – SIC 41 – 43	1	14%	1	14%	3	43%	0	0%	0	0%	0	0%	0	0%	1	14%	1	14%	1	14%	1	14%	0	0%	0	0%	0	0%	0	0%	7	100%
Wholesale and retail trade – SIC 45 – 46	3	50%	2	33%	0	0%	0	0%	2	33%	1	17%	1	17%	0	0%	0	0%	0	0%	0	0%	0	0%	1	17%	0	0%	0	0%	6	100%
Transportation and Storage – SIC 49 – 53	1	50%	0	0%	0	0%	0	0%	0	0%	1	50%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	100%
Information and communication - SIC 58	1	50%	0	0%	1	50%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	100%

	Site/premises too small		Premises too old / in poor condition		It's my home		It's on the first floor / prefer ground floor		Prefer a high street location / need more footfall		High business rates		High rents		Poor image of site / premises		Poor local facilities / amenities		Layout not ideal		Poor site access		Poor public transport		Lack of car parking		Premises too large		Strict planning rules (in Green Belt)		Total	
– 63																																
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%	0	0%	1	100%
Professional, Scientific and technical activities - SICs 69 – 74	4	57%	1	14%	0	0%	1	14%	1	14%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	7	100%
Administrative and Support Service activities 77 – 82	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%
Other Services – SIC 94 – 95	1	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	100%
Total	17	46%	8	22%	4	11%	3	8%	3	8%	3	8%	3	8%	2	5%	2	5%	2	5%	1	3%	1	3%	1	3%	1	3%	1	3%	37	100%
By Size																																
1 – 10	12	41%	5	17%	4	14%	3	10%	2	7%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	29	100%
11 – 199	3	50%	2	33%	0	0%	0	0%	0	0%	0	0%	0	0%	1	17%	1	17%	1	17%	0	0%	0	0%	0	0%	0	0%	0	0%	6	100%
200 +	2	100%	1	50%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	100%

	Site/premises too small		**Premises too old / in poor condition**		**It's my home**		**It's on the first floor / prefer ground floor**		**Prefer a high street location / need more footfall**		**High business rates**		**High rents**		**Poor image of site / premises**		**Poor local facilities / amenities**		**Layout not ideal**		**Poor site access**		**Poor public transport**		**Lack of car parking**		**Premises too large**		**Strict planning rules (in Green Belt)**		**Total**	
Total	**17**	**46%**	**8**	**22%**	**4**	**11%**	**3**	**8%**	**3**	**8%**	**3**	**8%**	**3**	**8%**	**2**	**5%**	**2**	**5%**	**2**	**5%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**37**	**100%**
By Location																																
Basildon	9	50%	4	22%	1	6%	2	11%	1	6%	1	6%	0	0%	1	6%	0	0%	1	6%	0	0%	0	0%	0	0%	0	0%	0	0%	18	100%
Billericay	3	33%	1	11%	3	33%	1	11%	0	0%	2	22%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%	9	100%
Wickford	5	50%	3	30%	0	0%	0	0%	1	10%	1	10%	0	0%	1	10%	2	20%	1	10%	0	0%	0	0%	1	10%	0	0%	0	0%	10	100%
Total	**17**	**46%**	**8**	**22%**	**4**	**11%**	**3**	**8%**	**3**	**8%**	**3**	**8%**	**3**	**8%**	**2**	**5%**	**2**	**5%**	**2**	**5%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**37**	**100%**

Question B6: What is your company's top priority for future infrastructure investment?

Table C.17: Future Infrastructure Investment Priorities

	Transport		**ICT / Broadband in your locality**		**New premise**		**Better quality staff**		**Expansion of premises**		**Improve roads**		**Regenerate the Town centre**		**More blue-chip companies in the area**		**Energy Supply**		**Improve parking**		**None**		**Don't know**		**Other**		**Total**	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																												
Manufacturing – SICs 10 -33	6	13%	3	7%	0	0%	1	2%	1	2%	0	0%	0	0%	0	0%	0	0%	0	0%	24	52%	11	22%	0	0%	46	**100%**
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	0%	0	0%	0	0%	3	**100%**
Construction – SIC 41 – 43	6	13%	2	4%	0	0%	0	0%	0	0%	1	2%	0	0%	1	2%	0	0%	0	0%	30	64%	7	15%	0	0%	47	**100%**
Wholesale and retail trade – SIC 45 – 46	2	6%	0	0%	1	3%	0	0%	1	3%	1	3%	0	0%	0	0%	0	0%	0	0%	19	59%	8	25%	0	0%	32	**100%**
Transportation and Storage – SIC 49 – 53	0	0%	1	4%	1	4%	0	0%	1	4%	1	4%	0	0%	0	0%	0	0%	0	0%	18	67%	5	19%	0	0%	27	**100%**
Information and communication - SIC 58 – 63	0	0%	2	22%	1	11%	1	11%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	5	56%	0	0%	0	0%	9	**100%**

	Transport		ICT / Broadband in your locality		New premise		Better quality staff		Expansion of premises		Improve roads		Regenerate the Town centre		More blue-chip companies in the area		Energy Supply		Improve parking		None		Don't know		Other		Total	
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	1	8%	0	0%	1	8%	1	8%	0	0%	0	0%	0	0%	0	0%	0	0%	84	56%	35	24%	0	0%	13	**100%**
Professional, Scientific and technical activities - SICs 69 – 74	2	6%	2	6%	1	3%	1	3%	0	0%	1	3%	0	0%	0	0%	0	0%	0	0%	21	62%	6	18%	0	0%	34	**100%**
Administrative and Support Service activities 77 – 82	0	0%	0	0%	2	6%	1	3%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	21	62%	6	18%	0	0%	34	**100%**
Other Services – SIC 94 – 95	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	6	100%	0	0%	0	0%	6	**100%**
Total	**16**	**6%**	**11**	**4%**	**6**	**2%**	**5**	**2%**	**4**	**2%**	**4**	**2%**	**1**	**0%**	**1**	**0%**	**0**	**0%**	**0**	**0%**	**152**	**61%**	**51**	**20%**	**0**	**0%**	**37**	**100%**
By Size																												
1 – 10	12	7%	7	4%	5	3%	3	2%	3	2%	2	1%	0	0%	1	1%	0	0%	0	0%	152	61%	51	20%	0	0%	182	**100%**
11 – 199	3	6%	3	6%	1	2%	1	2%	1	2%	2	4%	1	2%	0	0%	0	0%	0	0%	28	53%	13	25%	0	0%	53	**100%**
200 +	1	6%	1	6%	0	0%	1	6%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	8	50	5	31%	0	0%	16	**100%**

	Transport		ICT / Broadband in your locality		New premise		Better quality staff		Expansion of premises		Improve roads		Regenerate the Town centre		More blue-chip companies in the area		Energy Supply		Improve parking		None		Don't know		Other		Total	
																						%						
Total	**16**	**6%**	**11**	**4%**	**6**	**2%**	**5**	**2%**	**4**	**2%**	**4**	**2%**	**1**	**0%**	**1**	**0%**	**0**	**0%**	**0**	**0%**	**152**	**61%**	**51**	**20%**	**0**	**0%**	**37**	**100%**
By Location																												
Basildon	11	7%	7	5%	3	2%	3	2%	3	2%	2	15	1	1%	0	0%	0	0%	0	0%	83	56%	35	24%	0	0%	18	**100%**
Billericay	2	4%	1	2%	3	6%	1	2%	0	0%	1	2%	0	0%	1	2%	0	0%	0	0%	30	63%	9	19%	0	0%	9	**100%**
Wickford	3	5%	3	5%	0	0%	1	2%	1	2%	1	2%	0	0%	0	0%	0	0%	0	0%	39	71%	7	13%	0	0%	10	**100%**
Total	**16**	**6%**	**11**	**4%**	**6**	**2%**	**5**	**2%**	**4**	**2%**	**4**	**2%**	**1**	**0%**	**1**	**0%**	**0**	**0%**	**0**	**0%**	**152**	**61%**	**51**	**20%**	**0**	**0%**	**37**	**100%**

Question B7: Are you planning to expand the business in the next 5 years?

Table C.17: Planning to Expand

	Expand		Keep Same		Downsize		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Manufacturing – SICs 10 -33	16	35%	29	63%	1	2%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	1	33%	2	67%	0	0%	3	100%
Construction – SIC 41 – 43	12	26%	34	72%	1	2%	47	100%
Wholesale and retail trade – SIC 45 – 46	8	25%	33	72%	1	3%	32	100%
Transportation and Storage – SIC 49 – 53	10	37%	15	56%	2	7%	27	100%
Information and communication - SIC 58 – 63	5	56%	4	44%	0	0%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	1	8%	12	92%	0	0%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	8	24%	25	74%	1	3%	34	100%
Administrative and Support Service activities 77 – 82	15	44%	17	50%	2	6%	34	100%
Other Services – SIC 94 – 95	1	17%	4	67%	1	17%	6	100%
Total	**77**	**31%**	**165**	**66%**	**9**	**4%**	**251**	**100%**
By Size								
1 – 10	55	30%	119	65%	8	4%	182	73%
11 – 199	18	34%	34	64%	1	2%	53	21%
200 +	4	25%	12	75%	0	0%	16	16%
Total	77	31%	165	66%	9	4%	251	100%
By Location								
Basildon	48	32%	94	64%	6	4%	148	100%
Billericay	14	29%	34	71%	0	0%	49	100%
Wickford	15	27%	37	67%	3	5%	55	100%
Total	77	31%	165	66%	9	4%	251	100%

Question B8: Will this expansion lead to a need for additional floor space?

Table C.19: Need for Additional Floorspace

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Manufacturing – SICs 10 -33	8	50%	7	44%	1	6%	16	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	1	100%	0	0%	1	100%
Construction – SIC 41 – 43	5	42%	7	58%	0	0%	12	100%
Wholesale and retail trade – SIC 45 – 46	5	63%	1	13%	2	25%	8	100%
Transportation and Storage – SIC 49 – 53	3	30%	4	40%	3	30%	10	100%
Information and communication - SIC 58 – 63	4	80%	0	0%	1	20%	5	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	1	100%	0	0%	1	100%
Professional, Scientific and technical activities - SICs 69 – 74	4	50%	3	38%	1	13%	8	100%
Administrative and Support Service activities 77 – 82	6	40%	7	47%	2	13%	15	100%
Other Services – SIC 94 – 95	1	100%	2	13%	0	0%	1	100%
Total	**36**	**47%**	**31**	**40%**	**10**	**13%**	**77**	**100%**
By Size								
1 – 10	26	47%	20	36%	9	16%	55	100%
11 – 199	9	50%	8	44%	1	6%	18	100%
200 +	1	25%	3	75%	0	0%	4	100%
Total	**36**	**47%**	**31**	**40%**	**10**	**13%**	**77**	**100%**
By Location								
Basildon	25	52%	18	38%	5	10%	48	100%
Billericay	4	29%	7	50%	3	21%	14	100%
Wickford	7	47%	6	40%	2	13%	15	100%
Total	**36**	**47%**	**31**	**40%**	**10**	**13%**	**77**	**100%**

Base: 77 respondents

Question B9: Roughly how much additional floor space do you think you will need?

(This question was only asked to those respondents who said in question B8 that their expansion would require additional floorspace)

Only a small proportion of respondents were able to estimate the amount of additional floorspace that they were likely to need. It is therefore not considered appropriate to analyse by industry, business or location.

36 respondents gave estimates equating to an average requirement of 147 square metres.

Question B10. Could this additional floorspace be provided on your current site through the following measures?

Table C.20: Measures for Providing Additional Floorspace

	Extension		Refurbishment		Redevelopment		More Intensive use of existing space		None of these		Total	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
Basildon	7	28%	1	3%	2	8%	3	12%	14	56%	25	100%
Billericay	2	50%	0	0%	1	25%	0	0%	2	50%	4	100%
Wickford	1	14%	0	0%	1	14%	1	14%	6	86%	7	100%
Total	**10**	**28%**	**1**	**14%**	**4**	**11%**	**4**	**11%**	**22**	**61%**	**36**	**100%**

Base: 36 Respondents

Question B11. Will this downsizing lead to a need for a reduction in floor space?

Table C.21: Need for Additional Floorspace

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Manufacturing – SICs 10 -33	0	0%	1	100%	0	0%	1	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	100%
Construction – SIC 41 – 43	0	0%	1	100%	0	0%	1	100%
Wholesale and retail trade – SIC 45 – 46	1	100%	0	0%	0	0%	1	100%
Transportation and Storage – SIC 49 – 53	2	100%	0	0%	0	0%	2	100%
Information and communication - SIC 58 – 63	0	0%	0	0%	0	0%	0	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	100%
Professional, Scientific and technical activities - SICs 69 – 74	0	0%	1	100%	0	0%	1	100%
Administrative and Support Service activities 77 – 82	0	0%	1	50%	1	50%	2	100%
Other Services – SIC 94 – 95	1	100%	0	0%	0	0%	11	100%
Total	4	44%	4	44%	1	11%	9	100%
By Size								
1 – 10	3	38%	4	50%	1	13%	8	100%
11 – 199	1	100%	0	0%	0	0%	1	100%
200 +	0	0%	0	0%	0	0%	0	100%
Total	4	44%	4	44%	1	11%	9	100%
By Location								
Basildon	2	33%	3	50%	1	17%	6	100%
Billericay	0	0%	0	0%	0	0%	0	100%
Wickford	2	67%	1	33%	0	0%	3	100%
Total	4	44%	4	44%	1	11%	9	100%

Base: 9 Respondents

Question B12: Roughly how much less floor space do you think you will need?

There was only one response to this question.

Question B13. What are the reasons for downsizing?

Only 9 businesses were planning to downsize and the reasons given for downsizing were: imminent retirement: reduced market demand; and efficiency savings and high rates.

Question B14. Have you considered relocating from your current premises?

Table C.22: Considered Relocating

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Sector						
Manufacturing – SICs 10 -33	9	20%	37	80%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	3	100%	3	100%
Construction – SIC 41 – 43	6	13%	41	87%	47	100%
Wholesale and retail trade – SIC 45 – 46	3	9%	29	91%	32	100%
Transportation and Storage – SIC 49 – 53	3	11%	24	89%	27	100%
Information and communication - SIC 58 – 63	3	33%	6	67%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	13	100%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	7	21%	27	79%	34	100%
Administrative and Support Service activities 77 – 82	5	15%	29	85%	34	100%
Other Services – SIC 94 – 95	2	33%	4	67%	6	100%
Total	**38**	**15%**	**213**	**85%**	**251**	**100%**
By Size						
1 – 10	29	16%	153	84%	182	100%
11 – 199	9	17%	44	83%	53	100%
200 +	0	0%	16	100%	16	100%
Total	**38**	**15%**	**213**	**85%**	**251**	**100%**
By Location						
Basildon	22	15%	126	85%	148	100
Billericay	8	17%	40	83%	48	100
Wickford	8	15%	47	85%	55	100
Total	**38**	**15%**	**213**	**85%**	**251**	**100**

Question B15: To which of the following locations have you considered relocating?

Table C.23: Location of Considered

	Brentwood		**Chelmsford**		**Rest of Essex**		**Thurrock**		**London**		**Elsewhere in South East**		**Overseas**		**Others**		**Total**	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing – SICs 10 -33	0	0%	1	11%	0	0%	1	11%	0	0%	0	0%	0	0%	7	78%	9	**100%**
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	**100%**
Construction – SIC 41 – 43	2	33%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	5	83%	6	**100%**
Wholesale and retail trade – SIC 45 – 46	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	100%	3	**100%**
Transportation and Storage – SIC 49 – 53	1	33%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	67%	3	**100%**
Information and communication - SIC 58 – 63	3	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	**100%**
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	**100%**
Professional, Scientific and technical activities - SICs 69 – 74	0	0%	2	29%	3	43%	0	0%	0	0%	0	0%	0	0%	2	29%	7	**100%**
Administrative and Support Service	0	0%	1	20%	0	0%	0	0%	0	0%	0	0%	0	0%	4	8)%	5	**100%**

	Brentwood		Chelmsford		Rest of Essex		Thurrock		London		Elsewhere in South East		Overseas		Others		Total	
activities 77 – 82																		
Other Services – SIC 94 – 95	0	0%	0	0%	0	0%	0	0%	1	50%	0	0%	0	0%	1	50%	2	**100%**
Total	**7**	**18%**	**4**	**11%**	**3**	**8%**	**1**	**3%**	**1**	**3%**	**0**	**0%**	**0**	**0%**	**25**	**66%**	**38**	**100%**
1 – 10	5	17%	2	7%	3	10%	1	3%	1	3%	0	0%	0	0%	19	66%	29	**100%**
11 – 199	2	22%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	6	67%	9	**100%**
200 +	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	**100%**
Total	**7**	**18%**	**4**	**11%**	**3**	**8%**	**1**	**3%**	**1**	**3%**	**0**	**0%**	**0**	**0%**	**25**	**66%**	**38**	**100%**
Basildon	5	17%	2	7%	3	10%	1	3%	1	3%	0	0%	0	0%	6	67%	22	**100%**
Billericay	2	25%	1	13%	2	25%	0	0%	0	0%	0	0%	0	0%	3	38%	8	**100%**
Wickford	1	13%	1	13%	1	13%	0	0%	0	0%	0	0%	0	0%	6	75%	8	**100%**
Total	**7**	**18%**	**4**	**11%**	**3**	**8%**	**1**	**3%**	**1**	**3%**	**0**	**0%**	**0**	**0%**	**25**	**66%**	**38**	**100%**

Base: 38 respondents

Question B16: Preferred locations for those wanting to relocate

Table C.24: Preferred Location

	Basildon		Billericay		Wickford		Southend		Benfleet		Brentwood		Chelmsford		Leigh on Sea		Rayleigh		Suffolk		Thurrock		Ilford		Barking		Any central location		Not sure yet / Undecide d		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Manufacturing – SICs 10 -33	5	56%	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%	1	11%	0	0%	0	0%	0	0%	0	0%	0		0%	0	0%	0	9	**100%**
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	**100%**
Construction – SIC 41 – 43	2	33%	0	0%	0	0%	0	0%	0	0%	1	17%	0	0%	0	0%	0	0%	1	17%	0	0%	0	0%	0	0%	0	0%	2	33%	6	**100%**
Wholesale and retail trade – SIC 45 – 46	1	33%	0	0%	1	33%	0	0%	1	33%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%	3	**100%**
Transportation and Storage – SIC 49 – 53	3	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	**100%**
Information and communication - SIC 58 – 63	0	0%	1	33%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	2	67%	3	**100%**
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	**100%**
Professional, Scientific and technical activities - SICs 69 – 74	3	43%	1	14%	0	0%	1	14%	0	0%	0	0%	1	14%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	14%	1	14%	7	**100%**
Administrative and Support Service	2	40%	1	20%	0	0%	0	0%	2	40%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	5	**100%**

	Basildon		Billericay		Wickford		Southend		Benfleet		Brentwood		Chelmsford		Leigh on Sea		Rayleigh		Suffolk		Thurrock		Ilford		Barking		Any central location		Not sure yet / Undecided		Total	
activities 77 – 82																																
Other Services – SIC 94 – 95	1	50%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	50%	0	0%	0	0%	0	0%	2	**100%**
Total	17	45%	3	8%	1	3%	1	3%	1	3%	3	8%	2	5%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	6	16%	38	**100%**
1 – 10	13	45%	2	7%	1	3%	0	0%	1	3%	2	7%	0	0%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	6	16%	29	**100%**
11 – 199	4	44%	1	11%	0	0%	1	11%	0	0%	1	11%	2	22%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	11%	9	**100%**
200 +	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	**100%**
Total	17	45%	3	8%	1	3%	1	3%	1	3%	3	8%	2	5%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	6	16%	38	**100%**
Basildon	11	50%	1	5%	0	0%	0	0%	1	5%	1	5%	0	0%	1	5%	0	0%	1	5%	1	5%	1	5%	1	5%	1	5%	3	14%	22	**100%**
Billericay	1	13%	2	25%	1	13%	0	0%	0	0%	1	13%	1	13%	0	0%	1	13%	0	05	0	0%	0	0%	0	0%	0	0%	2	25%	8	**100%**
Wickford	5	63%	0	0%	0	0%	1	13%	0	0%	1	13%	1	13%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	13%	8	**100%**
Total	17	45%	3	8%	1	3%	1	3%	1	3%	3	8%	2	5%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	1	3%	6	16%	38	**100%**

Base: 38 respondents

Question B17: To what type of location would you prefer to relocate?

Table C.25: Preferred Location Type for Relocation

	Dedicated industrial area		Town centre / commercial district		Mixed use area		Rural area		Residential area		Dedicated office area		Undecided		Other		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No	%	No	%	No	%
By Sector																		
Manufacturing – SICs 10 -33	5	56%	2	22%	2	22%	0	0%	0	0%	0	0%	0	0%	0	0%	9	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	100%
Construction – SIC 41 – 43	1	17%	1	17%	1	17%	1	17%	1	17%	0	0%	1	17%	0	0%	6	100%
Wholesale and retail trade – SIC 45 – 46	1	33%	0	0%	2	67%	0	0%	0	0%	0	0%	0	0%	0	0%	3	100%
Transportation and Storage – SIC 49 – 53	3	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	100%
Information and communication - SIC 58 – 63	1	33%	2	67%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	3	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	100%
Professional, Scientific and technical activities - SICs 69 – 74	2	29%	3	43%	1	14%	1	14%	0	0%	0	0%	0	0%	0	0%	7	100%

	Dedicated industrial area		Town centre / commercial district		Mixed use area		Rural area		Residential area		Dedicated office area		Undecided		Other		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No	%	No	%	No	%
Administrative and Support Service activities 77 – 82	2	40%	3	60%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	5	100%
Other Services – SIC 94 – 95	0	0%	1	50%	0	0%	0	0%	0	0%	1	50%	0	0%	0	0%	2	100%
Total	**15**	**39%**	**12**	**32%**	**6**	**16%**	**2**	**5%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**0**	**0%**	**38**	**100%**
By Size																		
1 – 10	12	41%	8	28%	6	21%	1	3%	1	3%	1	3%	0%	0	0%	0	29	100%
11 – 199	3	33%	4	44%	0	0%	1	11%	0%	0	0%	0	1	11%	0%	0	9	100%
200 +	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	100%
Total	**15**	**39%**	**12**	**32%**	**6**	**16%**	**2**	**5%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**0**	**0%**	**38**	**100%**
By Location																		
Basildon	10	45%	6	27%	3	14%	1	5%	1	5%	1	5%	0	0%	0	0%	22	100%
Billericay	2	25%	3	38%	3	38%	0	0%	0	0%	0	0%	0	0%	0	0%	8	100%
Wickford	3	38%	3	38%	0	0%	1	13%	0	0%	0	0%	1	13%	0	0%	8	100%
Total	**15**	**39%**	**12**	**32%**	**6**	**16%**	**2**	**5%**	**1**	**3%**	**1**	**3%**	**1**	**3%**	**0**	**0%**	**38**	**100%**

Base: 38 respondents

Question B18. Is this type of premises available in Basildon Borough?

Table C.26: Preferred Premises Type Available

	Yes		No		Don't Know		Total	
	No.	%	No.	%	No.	%	No.	%
By Sector								
Manufacturing – SICs 10 -33	8	89%	1	11%	0	0%	9	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	0	0%	0	0%	0	0%	0	100%
Construction – SIC 41 – 43	4	67%	1	17%	1	17%	6	100%
Wholesale and retail trade – SIC 45 – 46	2	67%	1	33%	0	0%	3	100%
Transportation and Storage – SIC 49 – 53	2	67%	1	33%	0	0%	3	100%
Information and communication - SIC 58 – 63	3	100%	0	0%	0	0%	0	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	100%
Professional, Scientific and technical activities - SICs 69 – 74	7	100%	0	0%	0	0%	0	100%
Administrative and Support Service activities 77 – 82	3	60%	1	20%	1	20%	5	100%
Other Services – SIC 94 – 95	1	50%	1	50%	0	0%	2	100%
Total	**30**	**79%**	**6**	**16%**	**2**	**5%**	**38**	**100%**
By Size								
1 – 10	24	83%	4	14%	1	3%	29	100%
11 – 199	6	67%	2	22%	1	11%	9	100%
200 +	0	0%	0	0%	0	0%	0	100%
Total	**30**	**79%**	**6**	**16%**	**2**	**5%**	**38**	**100%**
By Location								
Basildon	17	77%	3	14%	2	9%	22	100%
Billericay	6	75%	2	25%	0	0%	8	100%
Wickford	7	88%	1	13%	0	0%	8	100%
Total	**30**	**79%**	**6**	**16%**	**2**	**5%**	**38**	**100%**

Base: 38 respondents

Question B19. Do you consider the current location of your business to be a good and competitive location?

Table C.27: Good and Competition

	Yes		No		Total	
	No.	%	No.	%	No.	%
By Sector						
Manufacturing – SICs 10 -33	40	87%	6	13%	46	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	3	100%	0	0%	3	100%
Construction – SIC 41 – 43	41	87%	6	13%	47	100%
Wholesale and retail trade – SIC 45 – 46	29	91%	3	9%	32	100%
Transportation and Storage – SIC 49 – 53	26	96%	1	4%	27	100%
Information and communication - SIC 58 – 63	8	89%	1	11%	9	100%
Finance and Insurance + Real estate – SIC 64 – 68	13	100%	0	0%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	32	94%	2	6%	34	100%
Administrative and Support Service activities 77 – 82	31	91%	3	9%	34	100%
Other Services – SIC 94 – 95	6	100%	0	0%	6	100%
Total	**229**	**91%**	**22**	**9%**	**251**	**100%**
By Size						
1 – 10	165	91%	17	9%	182	100%
11 – 199	51	96%	13	81%	53	100%
200 +	17	9%	2	4%	16	100%
Total	**229**	**91%**	**22**	**9%**	**251**	**100%**
By Location						
Basildon	133	90%	15	10%	148	100%
Billericay	42	88%	6	13%	48	100%
Wickford	54	98%	1	2%	55	100%
Total	**229**	**91%**	**22**	**9%**	**251**	**100%**

Question B20: Why do you consider it a good and competitive location?

(respondents can give more than one reason and therefore totals do not add to base total)

Table C.28: Reasons Current Location is Good

	Access to road network		**Proximity to key clients / markets**		Close to home		Good environment / quality of life		Appropriate type of premises		Affordable premises		Access to rail network		Proximity to key suppliers		Proximity to skilled workforce		Customers are familiar with the		Access to the ports / harbours		Proximity to another key site		Good security		**Good free parking**		**Good Land lord**		**Room for expansion**		**No competitors nearby**		**Don't know / N/A**		**Total**	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
By Sector																																						
Manufacturing – SICs 10 -33	20	50%	25	63%	7	18%	11	28%	7	18%	2	5%	2	5%	2	5%	1	3%	0	0%	0	0%	1	3%	0	0%	1	3%	1	3%	1	3%	0	0%	0	0%	40	100%
Water supply, sewerage, waste management and remediation SICs 37 – 39	2	67%	2	67%	0	0%	0	0%	0	0%	0	0%	0	0%	1	33%	0	0%	0	0%	0	0%	0	0%	0	0%	1	3%	1	3%	1	3%	0	0%	0	0%	3	100%
Construction – SIC 41 – 43	18	44%	16	39%	15	37%	11	27%	2	5%	5	12%	7	17%	4	10%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	2%	41	100%
Wholesale and retail trade – SIC 45 – 46	17	59%	15	52%	5	17%	5	17%	5	17%	3	10%	5	17%	3	10%	0	0%	1	3%	1	3%	0	0%	1	3%	0	0%	0	0%	0	0%	0	0%	0	0%	29	100%
Transportation and Storage – SIC 49 – 53	13	50%	6	26%	1	4%	3	12%	8	31%	5	19%	2	8%	1	4%	1	4%	1	4%	2	8%	0	0%	1	4%	0	0%	0	0%	0	0%	0	0%	3	12%	26	100%

	Access to road network		**Proximity to key clients / markets**		Close to home		Good environment / quality of life		Appropriate type of premises		Affordable premises		Access to rail network	
Information and communication - SIC 58 – 63	1	13%	1	13%	5	63%	1	13%	2	25%	0	0%	1	13%
Finance and Insurance + Real estate – SIC 64 – 68	6	46%	6	46%	1	8%	3	23%	4	31%	1	8%	0	0%
Professional, Scientific and technical activities - SICs 69 – 74	15	47%	11	34%	6	19%	8	25%	7	22%	5	16%	3	9%
Administrative and Support Service activities 77 – 82	10	32%	11	35%	11	35%	4	13%	6	19%	1	3%	3	10%
Other Services – SIC 94 – 95	2	33%	4	67%	1	17%	1	17%	0	0%	0	0%	0	0%
Total	104	45%	97	42%	52	23%	45	20%	42	18%	30	13%	29	13%

	Proximity to key suppliers		Proximity to skilled workforce		Customers are familiar with the		Access to the ports / harbours		Proximity to another key site		Good security		**Good free parking**		**Good Land lord**		**Room for expansion**		**No competitors nearby**		**Don't know / N/A**		**Total**	
Information and communication - SIC 58 – 63	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	8	100%
Finance and Insurance + Real estate – SIC 64 – 68	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	13	100%
Professional, Scientific and technical activities - SICs 69 – 74	2	6%	1	3%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	32	100%
Administrative and Support Service activities 77 – 82	2	6%	2	6%	1	3%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	31	100%
Other Services – SIC 94 – 95	3	50%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	6	100%
Total	21	9%	6	3%	4	2%	3	1%	2	1%	2	1%	1	0%	1	0%	1	0%	1	0%	1	0%	229	100%

	Access to road network		Proximity to key clients / markets		Close to home		Good environment / quality of life		Appropriate type of premises		Affordable premises		Access to rail network		Proximity to key suppliers		Proximity to skilled workforce		Customers are familiar with the		Access to the ports / harbours		Proximity to another key site		Good security		Good free parking		Good Land lord		Room for expansion		No competitors nearby		Don't know / N/A		Total	
By Size																																						
1 – 10	69	42%	68	41%	45	27%	32	19%	25	15%	19	12%	19	12%	19	12%	16	10%	6	4%	4	2%	1	1%	2	1%	1	1%	1	1%	1	1%	1	0%	5	3%	165	100%
11 – 199	26	51%	22	43%	7	14%	9	18%	9	9	18%	8	16%	7	14%	2	4%	0	0%	0	0%	1	2%	1	2%	0	0%	0	0	0%	0	0%	1	2%	0	0%	51	100%
200 +	9	69%	7	54%	0	0%	4	31%	8	62%	3	23%	3	23%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	13	100%
Total	104	45%	97	42%	52	23%	45	20%	42	18%	30	13%	29	13%	21	9%	6	3%	4	2%	3	1%	2	1%	2	1%	1	0%	1	0%	1	0%	1	0%	1	0%	229	100%
By Location																																						
Basildon	62	47%	58	44%	21	16%	23	17%	29	22%	20	15%	15	11%	12	9%	5	4%	2	2%	3	2%	2	2%	1	1%	1	1%	1	1%	1	1%	0	0%	3	2%	133	100%
Billericay	20	48%	18	43%	17	40%	11	26%	6	14%	5	12%	7	17%	4	10%	1	2%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	1	2%	42	100%
Wickford	22	41%	21	39%	14	26%	11	20%	7	13%	5	9%	7	13%	5	9%	7	13%	5	9%	0	0%	2	4%	0	0%	0	0%	1	2%	0	0%	1	2%	1	2%	54	100%
Total	104	45%	97	42%	52	23%	45	20%	42	18%	30	13%	29	13%	21	9%	6	3%	4	2%	3	1%	2	1%	2	1%	1	0%	1	0%	1	0%	1	0%	1	0%	229	100%

Base: 229 respondents

Question B21: Why do you not consider your current location a good and competitive location?

There were only 22 respondents to this question the most common reasons given for Basildon Borough not being a good location were expensive premises (27%), lack of access to key clients / markets (23%) and lack of suitable sites and premises (18%).

Appendix D. Site Details

Appendix E. Site Suitability Matrix

Appendix F. Borough Overview Map

Appendix G. Site Maps

Appendix H. Experian Methodology

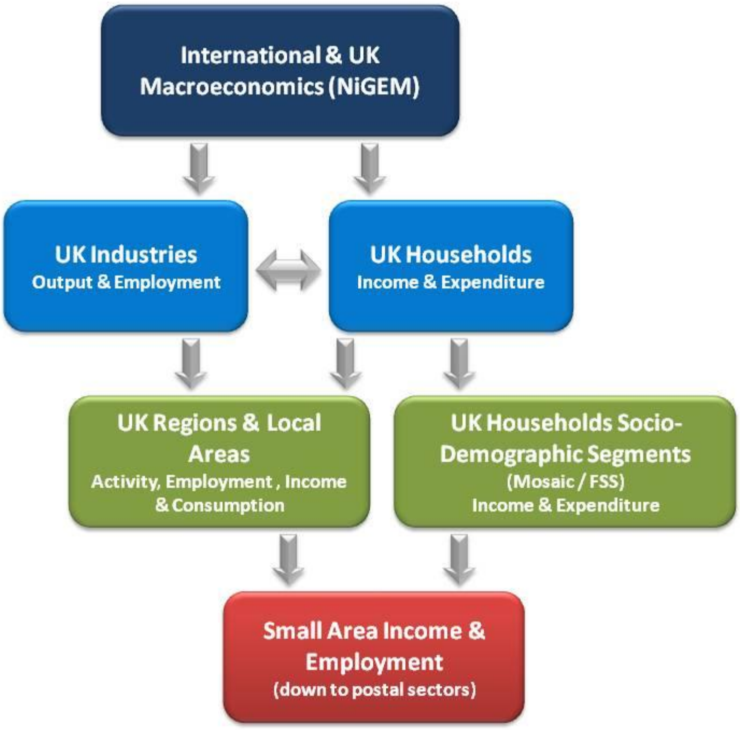
The Regional Planning Model (RPS)

H.1.1. Experian Economics' Regional Planning Service (RPS) provides detailed data for the UK Government Office Regions, their constituent counties and local authority districts for the period 1997-2031. The headline indicators of GVA and employment are provided for 38 SIC-97 sectors. Demographic estimates are also supplied alongside key output, housing, financial and labour market indicators.

Core Forecasting Methodology

H.1.2. The methodology is based on a top-down approach to regional and local area forecasting; therefore views on the international and UK economies form the basis of the regional view and the regions in turn feed the forecasts for their constituent local areas (as shown in the Figure below).

Figure H1: Experian's Top-Down Approach to forecasting local area employment



H.1.3. The high level economic forecast assumptions are generated within our International & UK macroeconomic forecast models. To produce the UK forecast we use a heavily customised version of the National Institute of Social & Economic Research's (NISER) model called NIGEM to provide our core macroeconomic forecast. NIGEM is a general equilibrium model of the UK and World economy which forecasts, amongst other things, aggregate output, expenditure, income and employment based on the UK National Accounts published by the Office of National Statistics (ONS). To split this core forecast out into industries and sub-sectors we have a Sectoral Model which expands on the forecasts from the core NIGEM model. This modelling framework provides substantial flexibility in specifying forecast/scenario assumptions and to allow structured sensitivity testing. NiGEM also provides confidence intervals around UK forecasts which will provide a robust basis for assessing the range of forecast outputs for more detailed expenditure forecasts. The UK industry and household finance forecasts then drive regional forecasts for economic output (GVA), employment, household income and expenditure which in turn drive local area forecasts (for Local & Unitary Authority Districts).

H.1.4. The *overall forecasting approach* is based on a methodology that combines long-term supply and demand influences with short-term demand side influences. In the short- to medium-term, the performance of the UK is driven by demand side influences while supply potential is the long-term determinant of growth. The model is used to produce an initial forecast which is evaluated by sector experts in light of their detailed knowledge. Alterations are made for significant pieces of inward investment, or infrastructure development, or changes to European funding, in the form of 'add factors'. A new forecast is then produced, which is again subject to rigorous inspection. This process continues until those responsible for the forecast are satisfied with the results. A similar process and model methodology (demand-driven in the short to medium term, but supply-determined in the longer term) is adopted to produce *regional forecasts*.

H.1.5. *County and local/unitary authority area (LAD) forecasts* are prepared once national and regional forecasts are finalised using a shift-share methodology. In broad terms, the historical performance of county economies is interpreted in terms of their share of the regional economy of which they are a part. In turn, the performance of the LAD areas is based on their share of their encompassing county. For each sector of the economy (38 categories, SIC97 definition), equations are produced for output and employment that explain the observable relationship between these variables at the local and regional level. The models are solved to initially produce forecasts of output for each of the counties for each of the 38 categories. In broad terms, if a county X has accounted for a steadily rising share of a sector P in region Y, then its share will continue to increase into the future. This applies whether the sector is increasing or decreasing in size at the regional level. These calculations are executed for every sector and every county in a region. All county totals must sum to regional totals. Output forecasts in each county in each industry are translated to employment by using wider regional productivity trends. The process is then repeated to produce forecasts for local areas relative to their wider counties. The forecasting process culminates with a set of county and sub-county level forecasts that are consistent with the national and regional forecasts which it is based on.

Focus on employment data

H.1.6. It should be noted that Experian Economics makes use of all available official data from the Office of National Statistics (ONS) to inform the forecasting process. For employment, data from the Business Register and Employment Survey (BRES) along with surveys such as the Labour Force Survey (LFS) is used.

H.1.7. The most timely and reliable data at the regional level is the workforce jobs series, published on a quarterly frequency by the ONS. Employee jobs, self-employed jobs and government trainees are published at the level of the SIC 2007 Section providing us with 22 sectors (ONS now publish no more sector detail). In order to disaggregate this Section-level data to 2-digit sectors from which we can construct the Experian 38 sectors we use official survey data:

- in the case of employee jobs, we use the Annual Business Inquiry (ABI) and Business Register & Employment Survey (BRES). These are annual surveys which are not updated after being published – further the methodology has changed over the lifetime of these surveys. We apply a principled set of rules to derive consistent employee job shares within the Sections from the surveys.
- in the case of self-employed jobs, we use data from the Labour Force Survey (LFS).

H.1.8. Workforce jobs is the sum of employee jobs, self-employed jobs, government trainees and Her Majesty's Forces (who are assigned at the sector level to Public Administration and Defence.)

H.1.9. To estimate full-time equivalent employment (FTE), we use data on hours worked in each sector and region derived from the Annual Survey of Hours and Earnings (ASHE). ASHE is also used to derive wage data for each region and sector. We also use, for this purpose, compensation of employee data from the regional accounts.

Focus on output (Gross Value Added) data

H.1.10. Gross Value Added (GVA) is published in the Regional Accounts at an annual frequency in current prices. Total GVA lags the latest complete year by 12 months while the industry detail lags by a further year. (i.e. the regional accounts published in December 2011 contained GVA by region up to and including 2010 with industry detail up to and including 2009). The industry detail is only at the Section level. To construct the Chain Volume Measure data we require we follow these steps:

- the data is disaggregated and made quarterly using workforce jobs data;
- the data is deflated at the industry level using the UK deflators for the industries;
- the data is aggregated to produce a regional total – this implicitly creates a regional deflator by taking into account the different weightings of industries within a region.

Focus on household data

H.1.11. Income is published in the regional accounts on an annual basis with a full breakdown of income sources and deductions. Income sources are:

- compensation of employees : wages and salaries plus employers social contributions
- self-employment income
- Net Property Income : made up of property income received less income paid
- transfers from the State (i.e. benefits)
- other Transfers

H.1.12. Income deductions are:

- taxes
- social contributions
- transfers to others

H.1.13. The sum of income sources less income deductions constitutes disposable income. To convert this annual data to quarterly jobs we use (depending on the component) employee jobs, self-employee jobs or the UK quarterly pattern. We constrain these quarterly series to the official UK published data. Real disposable income is obtained by deflating disposable income by the consumer price deflator.

H.1.14. Household spending is derived by sharing out UK nominal expenditure using regional shares of expenditure reported in the Living Costs and Food Survey by type of expenditure. Nominal regional spending is deflated by published UK deflators and then aggregated to produce a regional total. This again implicitly creates a regional cost of living measure which we also publish.

Focus on population data

H.1.15. Population projections are obtained from the ONS and spliced onto the latest mid-year-estimates, constrained to the latest GAD projections. The working-age definition incorporates all announced future changes in the state pension age (for example the different sliding retirement age for men and women).

Appendix I. Glossary

ABI (Annual Business Inquiry) - document produced by the Office of National Statistics, presenting financial and employment information about the UK economy.

Allocated Land/Sites/Areas - Land which is defined in the development plan as being acceptable in principle for development for a particular purpose and which is not already in use for that purpose.

Authorities Monitoring Report (AMR) - Part of the Development Plan, the authorities monitoring report assesses the implementation of the local development scheme and the extent to which policies in local development documents are being successfully implemented.

B Use Classes - Use Classes Order 1987 as amended. Classes of use for England are set out in the Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments; B1 Business - Offices, research and development, light industry appropriate in a residential area; B2 General industrial; B3-B7 Special Industrial Groups **-**Special industrial uses as set out in the 'Use Classes Schedule', e.g. Oil refining; B8 Storage or distribution -This class includes open air storage.

Comprehensive development area – provides for the development or redevelopment of a large site for mixed use development as part of a comprehensive development plan.

Economic activity rate - The number of people, who are economically active aged 16 to 59/64, expressed as a percentage of all working age people.

Economically Active - people that are in employment, either employees or self employed and those that are unemployed of working age (over 16) and who are looking and available to start work. They represent the total potential workforce in an area.

Economically Inactive - people who are neither in employment or registered unemployed, e.g. those looking after the home/children or retired (and of working age), or those that have not sought work in the last four weeks and are not available to start work.

Evidence Base - the information gathered by a planning authority to support the preparation of development documents. It includes quantitative (numerical values) and qualitative (feelings and opinions) data.

Green Belt - Area of land, largely rural in character, which is adjacent to the main urban areas and which is protected from development by permanent and severe restrictions on building. The emphasis is on restricting the sprawl of urban centres, preventing the coalescence of neighbouring towns and preserving the individual character of settlements, although Green Belts may also provide suitable locations for recreational development and act as a buffer between the most rural countryside and the pressure of growing towns.

Greenfield Land - land that has not previously been used for urban development. It is usually land last used for agriculture and located next to or outside existing built up areas of a settlement.

Gross Value Added (GVA) - An indicator of economic prosperity. It measures the contribution to the economy of each individual producer, industry or sector. It is based on the difference between the value of goods and services produced and the cost of raw materials and other inputs that are used in production.

Local Development Plan - the framework for delivering the spatial planning strategy for the area, comprised of local development documents, Authorities Monitoring Report, Local Development Scheme and Statement of Community Involvement.

Location Quotient - A measure of how strongly different industries are represented in the local economy compared to the wider region.

Mixed use – Development that combines two or more types of development, such as residential, office, industrial, retail, service, community facilities or leisure.

NPPF (National Planning Policy Framework) – The National Planning Policy Framework (NPPF) was published in March 2012. It is a key part of the coalition Government's reforms which aim to make the planning system less complex and more accessible and to promote sustainable growth. It consolidates all policy statements, circulars and guidance documents into a single, simpler Framework.

ONS (Office of National Statistics) – The Office for National Statistics (ONS) is the executive office of the UK Statistics Authority. ONS produces and publishes a wide range of the information about Britain that can be used for social and economic policy-making as well as painting a portrait of the country as its population evolves over time

Plot Ratio – the ratio of floor space within a building to the area of the site on which it sits.

Sector – broad classification for business activities.

Standard Industrial Classification (SIC) - classifies businesses by type of economic activity. This allows for statistical analysis and comparison.

Sustainable Development – development that meets the needs of the present without compromising the ability of future generations to meet their own needs

Unemployment – Refers to people without a job who were available to start work in the two weeks following their interview and who had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained.

Unemployment rate – The number of unemployed people aged 16 to 59/64 expressed as a percentage of the economically active population aged 16 to 59/64.

Untidy Industry area – Land that encompass a variety of industries which are not only untidy in appearance, but which also have the potential to cause significant environmental harm.

Use Classes Order – the Town and Country Planning (Use Classes) Order 1987 puts uses of land and buildings into various categories. Planning permission is not needed for changes of use within the same use class. In practice, changes between use classes are likely to require planning permission

Working Age – residents aged between 16 and 74.

Appendix J. Potential Sites Overview Map

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