

Colchester Employment Land Supply Delivery Trajectory Final Report

Colchester Borough Council

May 2017

LICHFIELDS



LICHFIELDS

Lichfields is the pre-eminent planning and development consultancy in the UK

We've been helping create great spaces
for over 50 years.

lichfields.uk

© 2017 Nathaniel Lichfield & Partners Ltd, trading as Lichfields. All Rights Reserved. Registered in England, no. 2778116. 14 Regent's Wharf, All Saints Street, London N1 9RL
Formatted for double sided printing.
Plans based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office.
© Crown Copyright reserved. Licence number AL50684A
14133/02/CGJ/TW
13936306v5

Contents

1.0	Introduction	1
	Background and Rationale	1
	Scope of Assessment	1
	Structure of Report	2
2.0	Methodology	3
	Approach to Assessment	4
3.0	Assessment of Sites	6
	Availability	6
	Deliverability	7
4.0	Supply Trajectory	8
	Demand/Supply Balance	10
5.0	Key Findings & Implications	12
	Key Findings	12
	Implications	12
	Future Updating & Monitoring	14

Figures

Figure 4.1 Indicative Delivery Trajectory for Employment Land Supply by Five-Year Period	8
--	---

Tables

Table 2.1 Sites Included in Trajectory	4
Table 3.1 Availability Analysis of Employment Sites	6
Table 3.2 Deliverability Analysis of Employment Sites	7
Table 4.1 Indicative Delivery Trajectory for Employment Land Supply by Five-Year Period	9
Table 4.2 Summary Net Floorspace Requirements by Scenario	10

Appendices

Appendix 1: Site Location Plans

Appendix 2: Site Assessment Matrix

Appendix 3: Discounted Sites

1.0 Introduction

- 1.1 This report has been prepared by Lichfields on behalf of Colchester Borough Council (CBC). It follows recommendations made in the Colchester Employment Land Needs Assessment (ELNA) 2015 that the Council should prepare more detailed evidence on the Borough's future employment land supply trajectory.¹

Background and Rationale

- 1.2 The 2015 ELNA identified that Colchester had sufficient employment floorspace in quantitative terms to meet objectively assessed economic growth needs over the study period up to 2032. The identified surplus of employment space ranged from 21.1ha to 97.9ha depending upon the growth scenario considered. Within this context, the ELNA recommended that:
- "...the Council should evidence how its portfolio of allocations and other development opportunities will support delivery of new space over the short, medium and long-term (structured broadly in five year periods)..."* (para 8.57)
- 1.3 The National Planning Policy Framework requires authorities to assess *"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"* (para 161) against the backdrop of positive planning for growth.
- 1.4 The Government's Planning Practice Guidance (PPG) states that assessments of land availability should identify a future supply of land which is suitable, available and achievable for economic development uses over the plan period. This forms a key component of the evidence base to underpin policies in development plans for economic development, including supporting the delivery of land to meet identified need for these uses. In particular, the PPG notes in para 025 that:
- "...Once the sites and broad locations have been assessed, the development potential of all sites can be collected to produce an indicative trajectory. This should set out how much housing and the amount of economic development that can be provided, and at what point in the future..."*
- 1.5 The need for analysis of this type has also been reflected in various best practice documents on employment land reviews such as the former SEEPB Guidance on Employment Land Assessments (2010) and the East Midlands ELS Source Book (2012).² These advocate the need for local authorities to consider the delivery and phasing of the employment sites identified as part of their portfolio. For example, the SEEPB guidance advised, *"to assist deliverability there should be at least a demonstrable five-year rolling supply of deliverable employment and economic development land...the schedule of sites should also be linked to the annual monitoring process and periodically updated to ensure the rolling supply of suitable and deliverable employment land."*

Scope of Assessment

- 1.6 This report provides an assessment of potential employment sites in Colchester Borough which form part of its employment land supply portfolio as identified in the Council's Preferred Options Local Plan (published for consultation in 2016) to meet future needs over the period to 2033. This includes Strategic Economic Areas, Local Economic Areas and other non-allocated

¹ Colchester Employment Land Needs Assessment, Nathaniel Lichfield & Partners, January 2015

² Employment Land Reviews Guidance Note, South East England Partnerships Board, 2010; Employment Land Study Source Book, East Midlands Councils, June 2012

sites which the Council considers to have potential to accommodate employment uses over the plan period.

- 1.7 The assessment examines the extent to which each site is available for employment development and how deliverable this would be within a series of five-year periods following the adoption of the Local Plan, taking account of particular constraints or other factors identified for each site.
- 1.8 It specifically responds to the recommendation set out in the 2015 Colchester ELNA to evidence how the Borough will accommodate its employment needs over the new Local Plan period. It is not intended to provide new demand-side estimates of employment needs or requirements. Commercial market feedback has been provided by Whybrow Chartered Surveyors, a local commercial property agency.
- 1.9 An important consideration for any work of this type is that it is inevitably a 'point-in-time' assessment that cannot entirely reflect very recent changes in circumstances not reflected in published statistics or evidence. This study has incorporated the latest information and relevant assumptions available at the time of preparation but which may be subject to change or revision over time. The accuracy of information derived from third party sources has not been checked or verified by Lichfields.

Structure of Report

- 1.10 The report is structured as follows:
- **Section 2.0** describes the methodology for the assessment of sites and development of a trajectory;
 - **Section 3.0** summarises the key findings of the assessment;
 - **Section 4.0** sets out the likely phasing of the Borough's employment land supply to arrive at an overall trajectory; and
 - **Section 5.0** provides key findings and implications.

2.0 Methodology

- 2.1 This section sets out the approach used to assessing the availability and deliverability of employment sites within Colchester and the likely trajectory of sites coming forward.
- 2.2 The assessment considered 25 sites; 8 of these were subsequently discounted, 2 are considered separately to the trajectory analysis, leaving 15 sites which were examined in further detail, comprising:
- 1 Strategic Economic Area (SEA) allocations as defined by Policy SG3 and Policies NC1 (Northern Gateway/Severalls SEA), EC1 (Knowledge Gateway SEA) and WC1 (Stanway SEA) of the Preferred Options Local Plan (2016 Consultation version).
 - 2 Other significant sites, predominantly those designated as Local Economic Areas by Policy SG4 of the Preferred Options Local Plan (2016 Consultation version).
- 2.3 Table SG3 within the Preferred Options Local Plan summarises the proposed employment allocations. These allocations include Strategic Economic Areas (which amount to a total combined employment land area of 45.4ha) and Local Economic Areas (with a combined total of 9.8ha of employment land).
- 2.4 A number of sites listed in Table SG3 (including discrete parcels of land located within the wider SEA or LEA site area) were discounted from the delivery trajectory analysis at the request of CBC where they do not have capacity to accommodate additional employment development over the plan period or where the Council are actively considering de-allocation from employment use. A list of these discounted sites is included in Appendix 3 for reference. As floorspace estimates have not been generated for discounted sites, only the 15 trajectory sites are considered in detail from Section 3.0 onwards.
- 2.5 Table SG3 within the Preferred Options Local Plan states that additional floorspace for non B Class economic uses will be provided in other areas, including Colchester town centre. The Borough's latest Retail and Town Centre Study identifies that the site known as 'Town Centre North West' may be able to accommodate further office floorspace potential.³ Just one town centre site (Sheepen Place) is included in the trajectory analysis, given that an office scheme is currently being developed on the site. Although it is acknowledged that further employment floorspace could potentially be delivered at other town centre sites over the plan period, at this stage there is less certainty about what this might comprise and at what point it might come forward.
- 2.6 Emerging proposals for three new garden communities across North Essex include two that fall within Colchester Borough, namely Colchester Braintree Borders and Tendring Colchester Borders. As and when these proposals come forward, it is likely they will include an element of B class employment floorspace. The garden communities represent longer term proposals and opportunities and as such have not been included within the trajectory. A brief summary of their potential to accommodate B use employment development is included in Section 4.0.
- 2.7 An overview of the 15 trajectory sites is provided in Table 2.1, with locations shown on the plans included at Appendix 1.

³ Retail and Town Centre Study 2016, prepared by Cushman & Wakefield, December 2016

Table 2.1 Sites Included in Trajectory

Site Status	Number of Sites	Potential Supply (sq.m)	
		Offices	Industrial
Northern Gateway/Severalls Strategic Economic Area	3	56,696	0
Knowledge Gateway Strategic Economic Area	3	22,538	0
Stanway Strategic Economic Area	3	20,506	36,590
Local Economic Areas	4	6,238	15,434
Other Sites	2	2,000	7,464
Total	15	107,978	59,488

Source: Lichfields analysis

Approach to Assessment

- 2.8 The assessment broadly follows an approach that shadows the equivalent exercise for the ‘availability’ and ‘achievability’ stages of Strategic Housing Land Availability Assessments (SHLAAs). It assumes that the ‘suitability’ status of the employment sites has already been considered as part of the 2015 ELNA site assessments. Based on a range of factors, the key questions that the assessment focuses on are therefore:
- **When is a site likely to be available for development?**
 - **When is a site likely to be able to deliver development?**
- 2.9 The assessments draw on representations submitted to the Preferred Options Consultation version of the Local Plan (submitted over the consultation period 9 July to 16 September 2016), discussions with Council officers and other available and relevant Council intelligence. Commercial market feedback has been provided by Whybrow Chartered Surveyors, a local commercial property agency.
- 2.10 Each site has been reviewed in terms of:
- a **Site details**
 - i site size;
 - ii allocation in Preferred Options Local Plan or presence of an extant planning permission;
 - iii potential for new industrial or office floorspace (based on emerging Local Plan allocation or extant planning permission).
 - b **Availability**
 - i ownership and current tenants/occupation status;
 - ii planning status/history;
 - iii known developer/landowner aspirations drawing on Local Plan representations and other Council intelligence where available.
 - c **Deliverability**

- i presence of abnormal of cumulative costs or delivery factors;
- ii market attractiveness of locality;
- iii extent of active marketing / known developer interest.

- 2.11 These findings have been drawn together in the form of a matrix with a red/amber/green ‘traffic light’ assessment for each site to indicate how it performs against each of the availability and deliverability criteria.
- 2.12 For sites assessed as both ‘available’ and ‘deliverable’/‘marginal’ during the Local Plan period, an estimate was made of the amount of floorspace that could be delivered. An assumption on the split in terms of office and industrial space on a site-by-site basis was made on the basis of scheme proposals (if available) or developer/landowner aspirations indicated in representations to the Council.
- 2.13 The amount of employment floorspace considered likely to be delivered on each site was calculated using an indicative plot ratio of 4,000sq.m per 1ha site area (i.e. 40%) or alternatively, based on estimates supplied by the Council or taken from planning permissions where applicable. The amount of floorspace considered likely to be delivered within each five-year period has been estimated based on the particular constraints and development factors identified for each site. These time periods were chosen to be consistent with the anticipated Local Plan timescale following adoption (i.e. 2017-2022, 2022-2027, and 2027-2033).

3.0 Assessment of Sites

3.1 This section summarises the key findings of the assessment, with further details for each site included at Appendix 2.

Availability

3.2 On the basis of the achievability factors assessed, a judgement was made on the overall achievability of each site coming forward for development as follows:

- a **Available Now** – sites where ownership, planning permission for B-class space and developer/landowner aspirations indicate that the site can be considered available now for development.
- b **Available in Future** – sites with some constraints in terms of ownership/current occupation, absence of planning permission or lack of clear developer/landowner aspirations, but there is a reasonable prospect that these can be overcome during the Plan period.
- c **Not Available** – sites with significant constraints in terms of ownership, planning status or conflicting developer/landowner aspirations which imply very limited prospect of the site being available for development during the Plan period.
- d **Unknown** – insufficient information available to make an assessment at this time.

3.3 Table 3.1 presents a summary of the results of the availability assessment. Of the 15 sites assessed, 4 are considered 'available' and 11 are considered 'available in the future'. None of the sites are considered 'not available' based on current information.

Table 3.1 Availability Analysis of Employment Sites

Status	Number of Sites	Potential Supply (sq.m)	
		Offices	Industrial
Available	4	21,306	0
Available in Future	11	86,672	59,488
Not Available / Unknown	0	0	0
Total	15	107,978	59,488

Source: Lichfields analysis

3.4 In floorspace supply terms, the results can be summarised as follows:

- a **Offices:** 20% of floorspace is considered 'available', with 80% assessed as being 'available in future';
- b **Industrial:** no floorspace is considered 'available', with 100% assessed as being 'available in future'.

Deliverability

- 3.5 On the basis of the deliverability factors assessed, a judgement was made on the overall deliverability of each site coming forward for development as follows:
- a **Deliverable** – sites where there are few factors which would pose ‘abnormal costs’ or other barriers, or where these exist there is a good prospect that they could be overcome (e.g. due to market strength or cross-subsidy of uses).⁴
 - b **Uncertain or Marginal** – sites where there are identified site works which are likely to present abnormal costs and where there is a question mark over the viability of employment development in the foreseeable future. In these instances further feasibility work is likely to be required to assess the extent to which these factors will impact upon viability and can be overcome within the plan period.
 - c **Not Deliverable** – sites where the identified works associated with the site (e.g. strategic infrastructure, site preparation) are not considered to be able to be delivered as part of the value generated by new employment development on site, to the extent that it could render development unviable.
 - d **Unknown** – insufficient information available to make an assessment at this time.

- 3.6 Table 3.2 presents a summary of the results of the deliverability assessment. Of the 15 sites assessed, 7 are considered ‘deliverable’ and 8 are considered ‘marginal/uncertain’. No sites are considered ‘not available’ or ‘unknown’ based on current information.

Table 3.2 Deliverability Analysis of Employment Sites

Status	Number of Sites	Potential Supply (sq.m)	
		Offices	Industrial
Deliverable	7	71,138	2,000
Marginal / Uncertain	8	36,840	57,488
Not Deliverable / Unknown	0	0	0
Total	15	107,978	59,488

Source: Lichfields analysis

- 3.7 In floorspace supply terms, the results can be summarised as follows:
- a **Offices:** 66% of floorspace is considered ‘deliverable’, with 34% assessed as being ‘marginal/uncertain’;
 - b **Industrial:** 3% of potential floorspace is assessed as ‘deliverable’, 97% is considered to be ‘marginal/uncertain’.

⁴ ‘Abnormal costs’ are the costs which a site has to incur to make it ‘oven ready’ for development over and above the normal on-site costs of developing a site. This could include decontamination works or mitigation works to address flooding issues for example.

4.0

Supply Trajectory

4.1

Based on the assessment of site availability and deliverability set out in Section 3.0, a potential floorspace supply trajectory has been compiled for both office and industrial space over the Local Plan period to 2033.

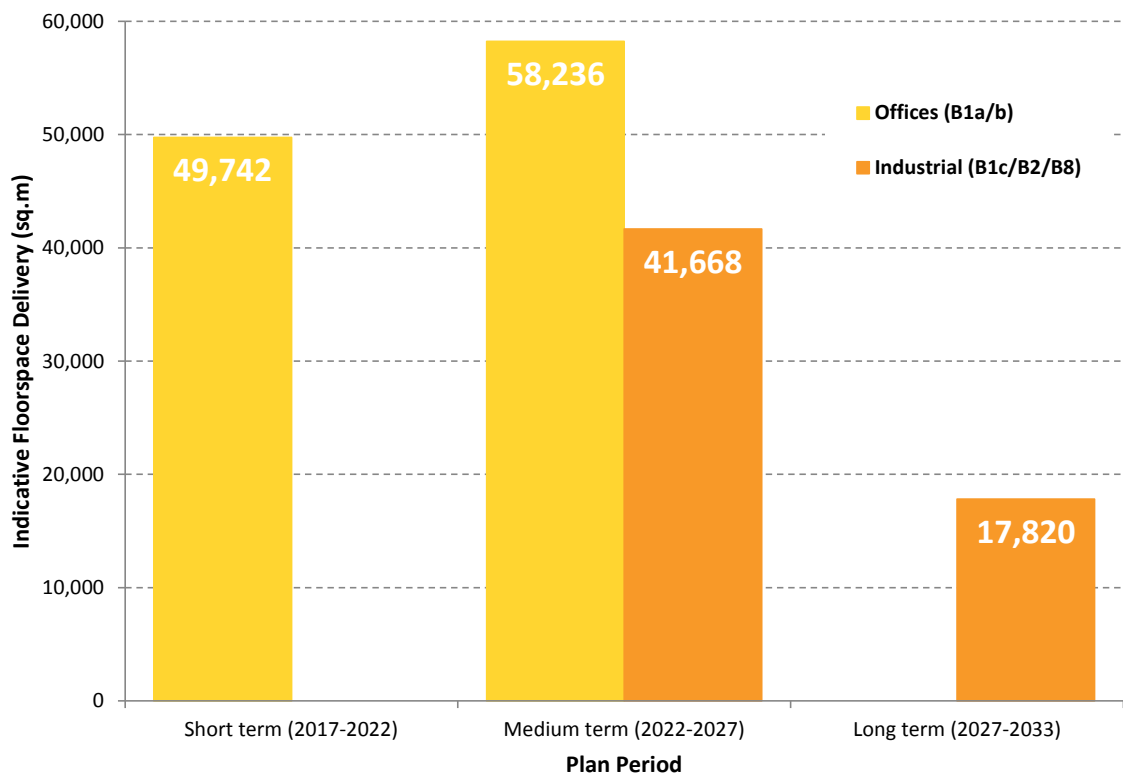
4.2

Drawing on the combination of availability and deliverability factors, each site has been allocated to a five-year period (i.e. 2017-2022, 2022-2027, or 2027-2033). As no sites were assessed as being 'not deliverable' or 'unknown', all 15 sites are included in the trajectory analysis.

4.3

The output from this exercise is shown in Figure 4.1 below and is set out in more detail in Table 4.1 overleaf.

Figure 4.1 Indicative Delivery Trajectory for Employment Land Supply by Five-Year Period



Source: Lichfields analysis

4.4

The results can be summarised as follows:

- 1 For **office floorspace**, nearly half (46%) is expected to be delivered over the short term between 2017-2022; just over half (54%) delivered over the medium term between 2022-2027 and none over the longer term between 2027-2033.
- 2 For **industrial floorspace**, the anticipated profile of delivery is comparatively more long term. Over two thirds (70%) is expected to be delivered over the medium term 2022-2027 and 30% over the longer term between 2027-2033. The analysis suggests that there will be no delivery of industrial floorspace over the first 5 years of the plan period.

Table 4.1 Indicative Delivery Trajectory for Employment Land Supply by Five-Year Period

Site Ref	Site Name	Indicative Delivery Trajectory (m ²)					
		Short term (0 - 5 years) 2017-2022		Medium term (6 - 10 years) 2022-2027		Long term (11 - 16 years) 2027-2033	
		Offices (B1a/b)	Industrial (B1c/B2/B8)	Offices (B1a/b)	Industrial (B1c/B2/B8)	Offices (B1a/b)	Industrial (B1c/B2/B8)
1	Northern Gateway - NE Quadrant	0	0	10,532	0	0	0
2	Northern Gateway - SE Quadrant	37,300	0	0	0	0	0
3	Severalls (undeveloped plot)	0	0	8,864	0	0	0
4	Knowledge Gateway - North Area	5,720	0	0	0	0	0
5	Knowledge Gateway - South Area	3,562	0	0	0	0	0
6	Knowledge Gateway - West Area	0	0	13,256	0	0	0
7	Stanway - Stane Park	0	0	13,554	13,554	0	0
8	Stanway - Tollgate South	0	0	6,952	6,952	0	0
9	Stanway - Lakelands West	0	0	0	16,084	0	0
10	Stanway - Trafalgar Farm	0	0	0	0	0	5,464
11	Whitehall Industrial Estate (undeveloped plot)	0	0	0	0	0	9,200
12	Maldon Road inc Shrub End Depot	0	0	0	0	0	3,156
13	Tiptree - Tower Business Park	0	0	3,078	3,078	0	0
14	Lodge Lane Langham	0	0	2,000	2,000	0	0
15	Town Centre - Sheepen Place	3,160	0	0	0	0	0
TOTAL		49,742	0	58,236	41,668	0	17,820

Source: Lichfields analysis

Garden Communities

4-5

The emerging proposals for new garden communities at Colchester Braintree Borders and Tendring Colchester Borders include an element of employment floorspace provision. The recently published North Essex Garden Communities Employment and Demographic Studies⁵ set out a number of scenarios for job growth at the two proposed garden communities and associated requirements for new floorspace. Scenario 3b ('potential unlocked') is the most optimistic scenario in terms of job creation and B class floorspace, and indicates that 6,858sq.m and 11,276sq.m of office floorspace could be developed at Colchester Braintree Borders and Tendring Colchester Borders, respectively. It is expected that this would be delivered over the medium term between 2022-2027 and longer term between 2027-2033. If job growth is more aligned with the other lower growth scenarios set out in the Studies then employment floorspace requirements would be lower. These garden communities straddle the border between

⁵ North Essex Garden Communities Employment and Demographic Studies, Cambridge Econometrics and SQW, Draft Final Report, February 2017.

Colchester Borough and Tendring/Braintree and it is unclear at this stage how much of this employment floorspace could be provided within Colchester Borough itself. Given the general level of uncertainty at this stage, the garden communities have been excluded from the trajectory analysis.

Demand/Supply Balance

- 4.6 The 2015 Colchester ELNA calculated a series of net and gross requirements for office and industrial floorspace based on four different PPG-compliant scenarios of how the Borough's economy might change and develop over the plan period.
- 4.7 The net floorspace requirements are summarised in Table 4.2 below, alongside more recent work undertaken by Peter Brett Associates (PBA) to calculate how much employment land and floor space is needed to accommodate the jobs needed to align with the population associated with the Objectively Assessed Housing Needs identified for Colchester Borough (alongside the other Essex Districts of Braintree, Chelmsford and Tendring) as presented within the November 2016 Strategic Housing Market Assessment (SHMA). This looked at two employment forecasts for the area; the first taken from the 2016 EEFM and the second from Experian based on their September 2016 model run but with an amended population assumption to align with the population shown in the November 2016 SHMA.

Table 4.2 Summary Net Floorspace Requirements by Scenario

Scenario/Source		Study Time Period	Offices (B1a/B1b)	Industrial (B1c/B2/B8)	All B Uses
NLP Colchester ELNA (January 2015)	1. Baseline Job Growth (EEFM 2013)	2014 - 2032	94,480	-9,660	84,820
	2. Past Completion Rates		60,445	-189,880	-129,435
	3. Higher Past Completion Rates		60,445	117,325	177,770
	4. Labour Supply (2012 Based SNPP)		76,000	-28,440	47,560
PBA Employment Land and Floorspace (January 2017)	EEFM 2016	2014 - 2036	95,723	-52,000	43,723
	Experian September 2016 (OAN Adjusted)		82,508	47,275	129,784

Source: Lichfields (2015) / Peter Brett Associates (2017)

- 4.8 The PBA scenarios do not make any allowance for market choice, churn or friction, and therefore represent 'net floorspace requirements'. To enable a comparison across all scenarios, the equivalent net floorspace figures from the 2015 ELNA are summarised in Table 4.2 above. This represents the minimum recommended quantum of employment space to plan for. The time periods associated with the Lichfields and PBA studies differ slightly, with the PBA figures extending across a slightly longer time horizon (to 2036).
- 4.9 A broad comparison of net B class floorspace requirements against the identified pipeline supply emerging from the trajectory work, as shown in Table 4.3 below, implies that Colchester would have sufficient employment space in overall quantitative terms to meet the needs associated with all but one scenario over the plan period.

Table 4.3 Demand / Supply Balance⁶

Scenario / Use	NLP Colchester ELNA (January 2015)				PBA Employment Land and Floorspace (January 2017)	
	1. Baseline Job Growth (EEFM 2013)	2. Past Completion Rates	3. Higher Past Completion Rates	4. Labour Supply (2012 Based SNPP)	EEFM 2016	Experian September 2016 (OAN Adjusted)
All B Uses						
Requirement	84,820	-129,435	177,770	47,560	43,723	129,784
Potential Supply ⁷	167,466					
Surplus(+)/Shortfall(-)	+82,646	+296,901	-10,304	+119,906	+123,743	+37,682
Offices						
Requirement	94,480	60,445	60,445	76,000	95,723	82,508
Potential Supply	107,978					
Surplus(+)/Shortfall(-)	+13,498	+47,533	+47,533	+31,978	+12,255	+25,470
Industrial						
Requirement	-9,660	-189,880	117,325	-28,440	-52,000	47,275
Potential Supply	59,488					
Surplus(+)/Shortfall(-)	+69,148	+249,368	-57,837	+87,928	+111,488	+12,213

Source: Lichfields (2015) / Peter Brett Associates (2017) / Lichfields analysis

- 4.10 The pipeline of office floorspace identified by the supply trajectory analysis would appear to be sufficient to accommodate office based requirements assessed under all 2015 ELNA scenarios as well as the two more recent scenarios developed by PBA (Table 4.3).
- 4.11 A similar surplus position is shown for industrial uses, with pipeline industrial floorspace capable of accommodating all but one scenario (the higher past completion rates scenario developed as part of the 2015 ELNA) in quantitative terms.
- 4.12 The net floorspace requirement figures represent the minimum recommended quantum of employment land to plan for in the Borough. It should be noted that in absence of planning to accommodate an additional allowance for future losses of existing employment space and to account for delays in sites coming forward for development (i.e. allowances which are typically factored into the 'gross requirement' calculation), there is a risk that future employment development in Colchester is constrained by a lack of choice and flexibility within the market. This could present a particular risk in Colchester where many of the Borough's employment allocations face viability challenges and uncertainty regarding timing of delivery.

⁶ It should be noted that floorspace/land requirements identified in the 2015 ELNA cover the period 2014 to 2032, those identified in the PBA work cover the period 2014 to 2036 and the Local Plan period extends to 2033.

⁷ Potential supply figures taken from the trajectory. This differs from emerging/pipeline supply figures cited in the 2015 ELNA study which have been updated by CBC to reflect the latest supply position at the time of analysis.

5.0

Key Findings & Implications

5.1

Based on the analysis in the preceding sections, the following key findings and implications can be identified.

Key Findings

- 1 This report has assessed the availability and deliverability of sites identified by CBC as having the potential to contribute towards meeting future office and industrial floorspace requirements in the period to 2033. The analysis is limited to 15 sites located across the Borough; it is recognised that other sites will also contribute to meeting future needs (e.g. through mixed-use redevelopment) although it has not been possible to quantify this additional contribution as part of this assessment.
- 2 Of the 15 sites considered in the trajectory, all are considered to be either ‘available’ or ‘available in the future’. More specifically:
 - i 20% of potential office floorspace is considered ‘available’, with the remaining 80% ‘available in the future’;
 - ii None of the potential industrial floorspace is considered ‘available’, but 100% is considered ‘available in the future’.
- 3 In terms of deliverability, 7 sites are assessed as ‘deliverable’ and 8 are considered ‘marginal/uncertain’. The implications are that:
 - i 66% of office floorspace is considered ‘deliverable’, with 34% assessed as ‘marginal/uncertain’;
 - ii 3% of potential industrial floorspace is assessed as ‘deliverable’, while 97% is considered ‘marginal/uncertain’.
- 4 Drawing these factors together, the potential supply trajectory can be summarised as:
 - i 46% of office floorspace is expected to be delivered between 2017-2022; 54% between 2022-2027; with no floorspace expected to be delivered between 2027-2033.
 - ii 70% of industrial floorspace is expected to be delivered between 2022-2027; and 30% between 2027-2033.
- 5 When compared against net requirements for employment floorspace set out in the 2015 ELNA and more recent OAN aligned scenarios developed by PBA, the analysis suggests that Colchester would have sufficient employment space in overall quantitative terms to meet the needs associated with all but one scenario over the plan period. A surplus position is identified for office floorspace across all scenarios, and for industrial floorspace across all but one scenario (the higher past completion rates scenario in the 2015 ELNA).

Implications

5.2

As noted above, all of the 15 sites included within the trajectory are considered to be available either now, or at some point over the new Local Plan period. However, more than half of the sites are considered to be marginal or uncertain in deliverability terms, including the majority of industrial floorspace considered as part of the trajectory.

5.3

Due to the diverse nature of the sites considered, they are expected to come forward for development at various different points over the Local Plan period. These timing assumptions

represent best guess estimates based on site-by-site information available at the time of analysis and are subject to change as development plans and assumptions evolve.

- 5.4 In order to encourage market choice and flexibility, the employment land supply trajectory would ideally include an element of both office and industrial floorspace within each of the short, medium and long term periods of the Local Plan. The Council may therefore wish to consider potential options to ‘smoothen out’ the currently identified trajectory of floorspace delivery in the Borough over the coming years. This could include identifying options to substitute some office for industrial floorspace on some of the trajectory sites (and vice versa), and considering practical approaches to bring forward industrial development at an earlier point in the Local Plan period (for example through cross-subsidising delivery or increasing the assumed quantum of industrial floorspace on other mixed-use sites).
- 5.5 It is important to acknowledge that the sites assessed in this study are not the only potential sources of new employment floorspace available in Colchester. There will be other sites that make some contribution to meeting future needs including emerging proposals for new Garden Communities straddling Colchester’s border, although insufficient information and assumptions are available at this time to be able to quantify these opportunities and incorporate into the trajectory analysis.

Office Floorspace

- 5.6 Office sites tend to have fewer notable obstacles and barriers with regards to potential availability and deliverability when compared with industrial sites, so are generally expected to come forward for development at an earlier point in the Local Plan period. The highest quantum of office floorspace delivery is anticipated in the medium term period between 2022 and 2027. In the initial five-year period, this includes the North and South areas of the Knowledge Gateway (site refs. 4 and 5). Both sites have extant planning permission which helps to provide some confidence of delivery.
- 5.7 Beyond this, there is greater reliance on larger office schemes coming forward in phases over a number of years (e.g. Northern Gateway, Stane Park). Phasing will help provide flexibility to respond to needs as they arise. Although office space delivery is expected to peak in quantitative terms in the medium term 2022- 2027 period reflecting the concentration of larger schemes, this will not obviate the need to ensure that potential smaller office developments (e.g. Colchester Business Park, Tollgate South, Tower Business Park, Lodge Lane) also come forward in order to provide a range and choice of supply to meet the needs of different types of occupiers, as well as greater flexibility to meet market requirements. The Council will also want to carefully monitor those sites included within the earlier 2017-2022 Local Plan period to ensure that office developments identified are delivered (in part or in full), and consider scope to help accelerate the phasing of later schemes in the event that they do not come forward and the pipeline supply of new office space becomes constrained.
- 5.8 As noted above, the pipeline of office floorspace identified by the supply trajectory analysis would appear to be sufficient to accommodate office based requirements assessed under all 2015 ELNA scenarios as well as the two more recent scenarios developed by PBA. This calculation refers to ‘net floorspace requirements’ and does not take account of additional allowances for future losses of existing employment space and to account for delays in sites coming forward for development. The relative balance could be tighter once these additional allowances are made.

Industrial Floorspace

- 5.9 In contrast to offices, industrial sites tend to face more barriers and uncertainty and are therefore included within the trajectory’s medium and longer term plan periods. It is considered

that the majority of potential supply currently identified could come forward in the medium term 2022-2027 period. This reflects the fact that a number of the Stanway sites (Stane Park, Tollgate South and Lakelands West) are anticipated to come forward in this period, albeit deliverability is considered to be 'marginal/uncertain' for many of these. Delivery in the longer term period 2027-2033 largely depends on Whitehall Industrial Estate (site ref. 11).

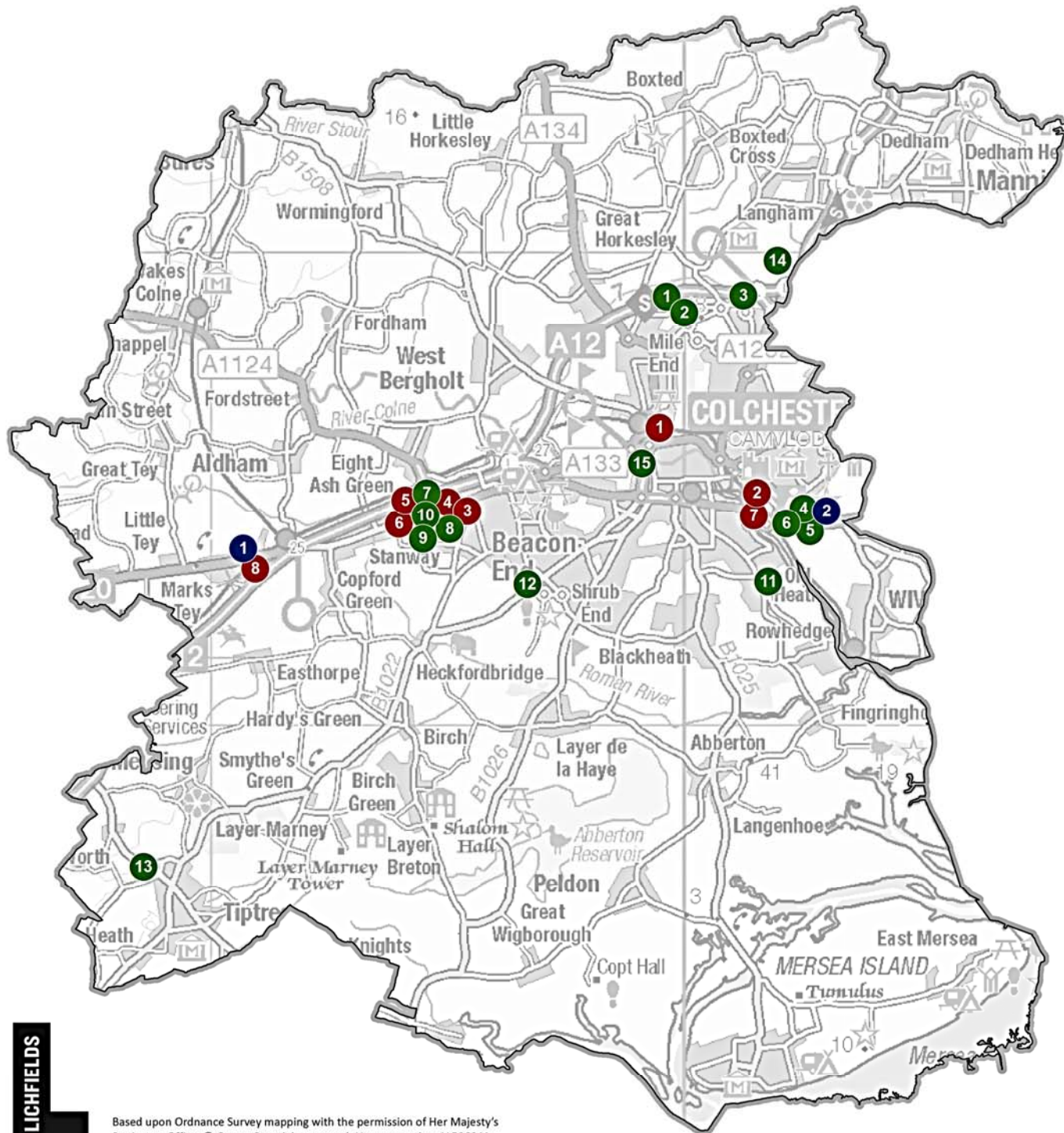
- 5.10 When compared against the range of demand-side requirements prepared as part of the 2015 ELNA and more recent OAN economic modelling, a floorspace surplus position is identified for industrial uses, with pipeline industrial floorspace capable of accommodating all but one scenario in quantitative terms.

Future Updating & Monitoring

- 5.11 The analysis contained in this report is based on the latest available information at the time of preparation and may be subject to change. It is therefore recommended that the Borough Council undertake regular updating of this assessment taking account of latest site and market information, linked to normal authority monitoring report cycles.
- 5.12 Market attractiveness and economic viability factors have been considered as part of the 'deliverability' aspect of the employment land supply trajectory analysis, based on feedback from a local commercial property agent. Market factors affecting individual sites will inevitably change over time and will need to be monitored as the new Local Plan is implemented and the supply trajectory is updated. The latest market intelligence⁸ suggests that Colchester's commercial property market is stable and is characterised by a greater level of activity compared with 12 months ago. There are however a number of external factors which are expected to impact upon the Borough's commercial property market over the coming months, including recent changes to the rateable value of commercial premises (which have had significant impacts on business rates payable on business premises in Colchester) and the continuing rise in building costs which are expected to affect the viability of new development in the Borough.
- 5.13 It should be noted that for most of the sites included within the trajectory analysis, potential floorspace delivery has been estimated by Lichfields in purely theoretical terms based on site area, typical plot ratios and employment density assumptions. These assumptions have a significant bearing on the overall quantum of floorspace and the breakdown between office and industrial uses, and there will likely be scope to change this split as and when specific development proposals and schemes come forward.

⁸ Presented at the Colchester Ninth Annual Property Seminar 2017 held on 23rd March 2017

Appendix 1: Site Location Plans



Trajectory Site

- 1 Northern Gateway - NE Quadrant
- 2 Northern Gateway - SE Quadrant
- 3 Colchester Business Park
- 4 Knowledge Gateway - North Area
- 5 Knowledge Gateway - South Area
- 6 Knowledge Gateway - West Area
- 7 Stanway - Stane Park
- 8 Stanway - Tollgate South
- 9 Stanway - Lakelands West
- 10 Trafalgar Farm
- 11 Whitehall Industrial Estate
- 12 Maldon Road inc. Shrub End Depot
- 13 Tiptree - Tower Business Park
- 14 Lodge Lane, Langham
- 15 Town Centre - Sheepen Place



Discounted Site

- 1 Clarendon Way
- 2 Davey Close
- 3 Former Sainsbury's Site, Stanway
- 4 Tollgate
- 5 Tollgate Business Park, Stanway
- 6 Westside Centre, Stanway
- 7 The Hythe
- 8 Marks Tey - Anderson's Site



Garden Communities

- 1 Colchester Braintree Borders
- 2 Tendring Colchester Borders

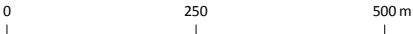


Trajectory Site

Discounted Site

Garden Communities

Colchester Local Authority Context



Project Colchester Employment Land Trajectory

Title Sites

Client Colchester Borough Council

Date 22.05.2017

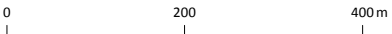
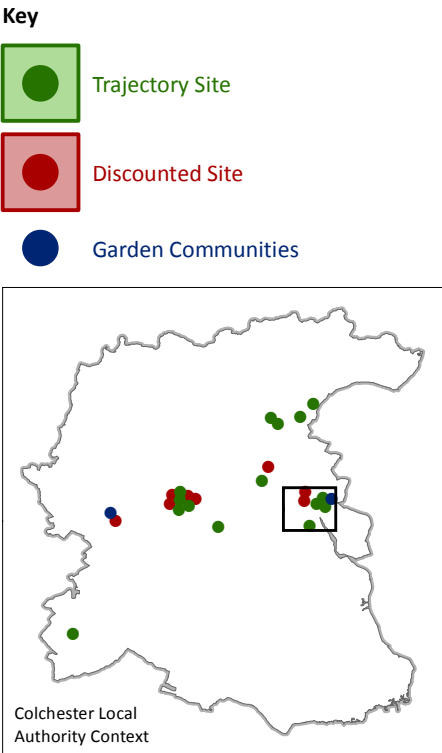
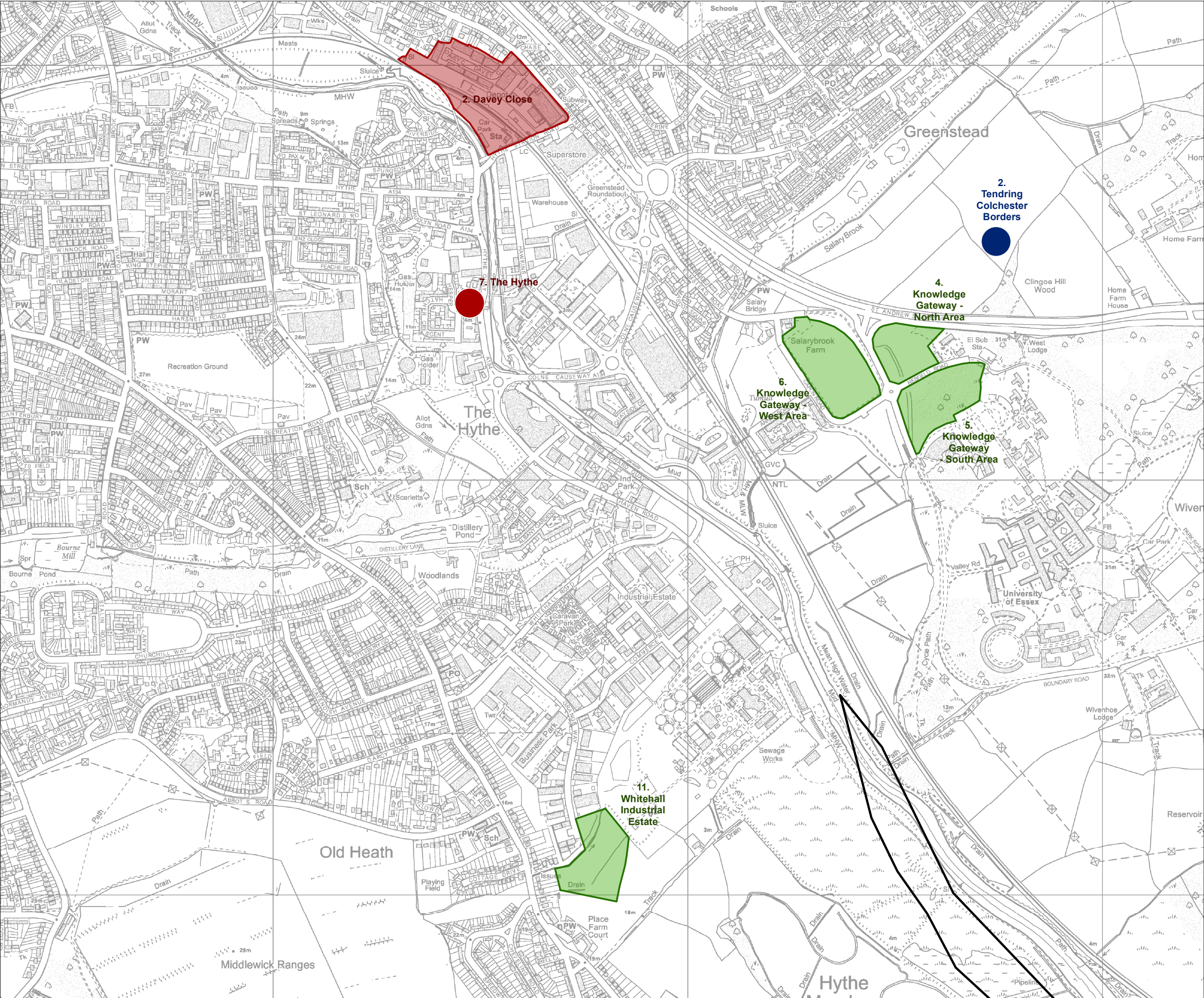
Scale -

Drawn by MAR

Drg. No GIS\CL\14133\02-13

GIS Reference: S:\CL\14133 - Colchester Employment Land Trajectory
\CL14133-02 - Colchester Employment Land Trajectory - Employment
Sites (01) - 02.05.20172017.mxd





Project	Colchester Employment Land Trajectory
Title	Sites
Client	Colchester Borough Council
Date	22.05.2017
Scale	-
Drawn by	MAR
Drg. No	GIS\CL\14133\02-14

GIS Reference: S:\CL\14133 - Colchester Employment Land Trajectory
\CL14133-02 - Colchester Employment Land Trajectory - Employment
Sites (02) - 02.05.2017.mxd





Key

Trajectory Site

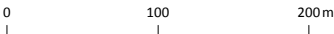
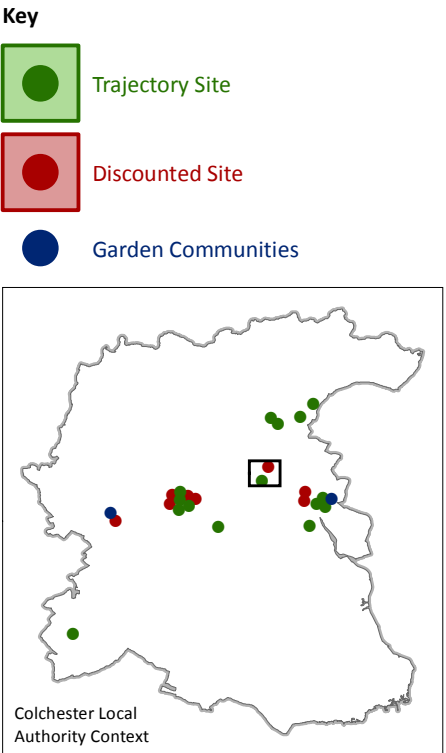
Discounted Site

Garden Communities

Colchester Local Authority Context

Project	Colchester Employment Land Trajectory
Title	Sites
Client	Colchester Borough Council
Date	02.05.2017
Scale	-
Drawn by	MAR
Drg. No	GIS\CL\14133\02-16

GIS Reference: S:\CL14133 - Colchester Employment Land Trajectory
\CL14133-02 - Colchester Employment Land Trajectory - Employment
Sites (04) - 02.05.2017.mxd

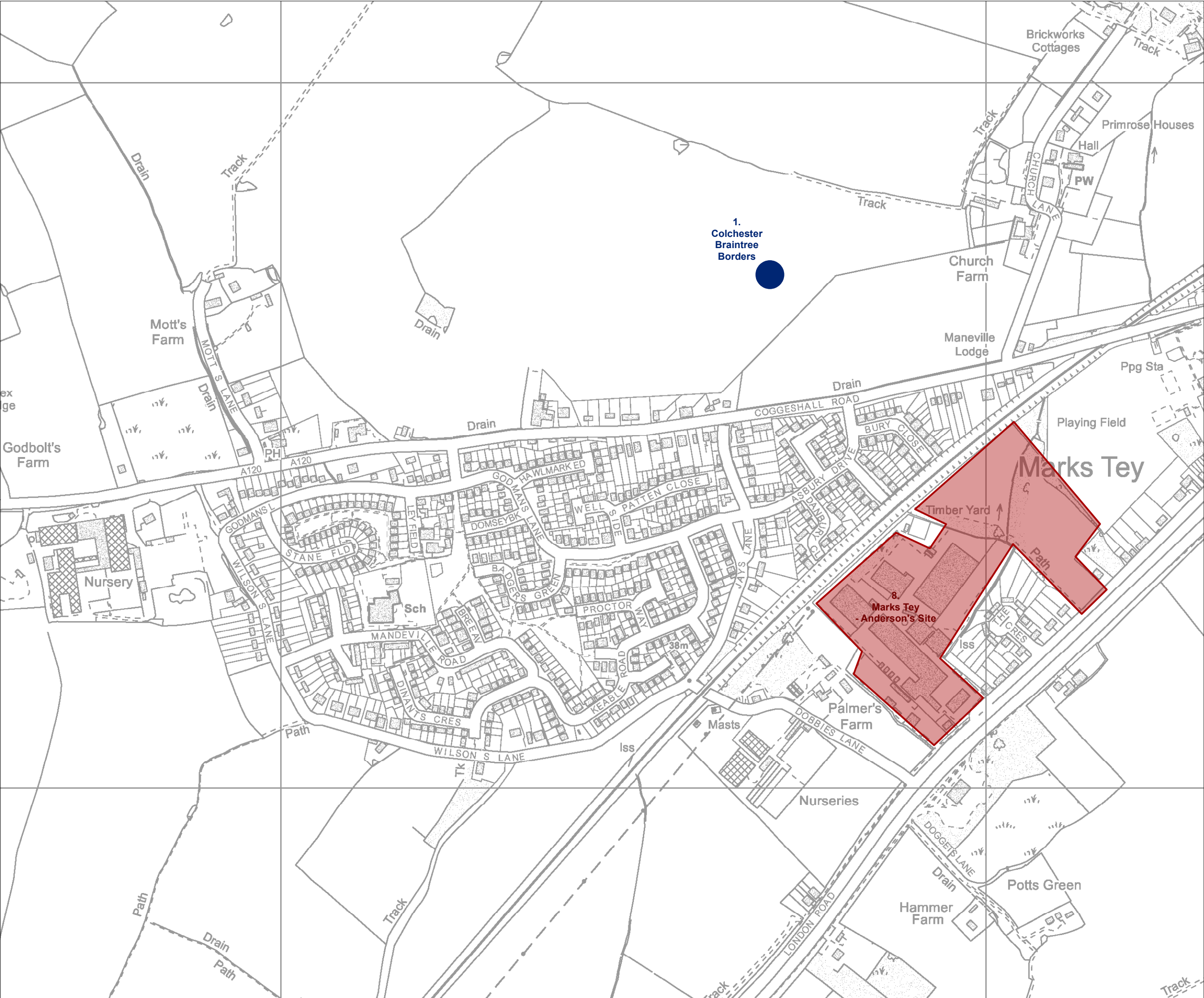


LICHFIELDS

Project	Colchester Employment Land Trajectory
Title	Sites
Client	Colchester Borough Council
Date	02.05.2017
Scale	-
Drawn by	MAR
Drg. No	GIS\CL\14133\02-17

GIS Reference: S:\CL14133 - Colchester Employment Land Trajectory
CL14133-02 - Colchester Employment Land Trajectory - Employment Sites (05) - 02.05.2017.mxd

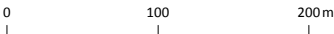




Key

- Trajectory Site
- Discounted Site
- Garden Communities

Colchester Local Authority Context



Project	Colchester Employment Land Trajectory
Title	Sites
Client	Colchester Borough Council
Date	02.05.2017
Scale	-
Drawn by	MAR
Drg. No	GIS\CL\14133\02-18

GIS Reference: S:\CL14133 - Colchester Employment Land Trajectory
\CL14133-02 - Colchester Employment Land Trajectory - Employment
Sites (06) - 02.05.2017.mxd



Appendix 2: Site Assessment Matrix

Colchester Employment Land Supply Trajectory

Site Details							Availability							Deliverability									
Site Ref	Site Name	Size (ha)	Planning permission? (Y/N)	Potential New Floorspace (m ²)			Ownership and Occupation	RAG Assessment	Planning Status (Preferred Options Local Plan 2017 - 2033)	Planning Status (Adopted Local Plan Core Strategy 2001 - 2021)	RAG Assessment	Developer / Landowner Aspirations	RAG Assessment	Overall Availability	Cumulative or Abnormal Cost / Delivery Factors?	RAG Assessment	Economic Viability / Market Factors					Overall Deliverability	
				Total	Offices (B1a/b)	Industrial (B1c/B2/B8)											Market Attractiveness of Locality *	RAG Assessment	Active marketing / known developer interest? *	RAG Assessment	Viability Factors		RAG Assessment
1	Northern Gateway - NE Quadrant	1.8	N	10,532	10,532	0	Single ownership, no occupiers	Green	NC1, Zone 1 (Northern Gateway/Severalls Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA NGA1, SA NGA2 and SA NGA3; and Development Policy DP5	Green	Council own land and are keen to promote B1 uses - ideally high-tech offices and associated uses	Green	Available in Future	A greenfield site with limited existing infrastructure, although there is committed funding for broadband at the Northern Gateway	Green	As greenfield sites on the edge of Colchester town, currently represent an untested market proposition. Nevertheless, sites are in high profile, prominent location in a 'gateway' position into the town with excellent strategic road access to A12. Unlikely to be sufficient indigenous demand for this quantum of new office space in Colchester, so more likely to represent a longer term inward investment opportunity/site.	Amber	CBC own these sites but to date no marketing has taken place. Therefore difficult to determine whether there would be developer interest, but suspect unlikely for this scale of development in current marketplace. Northern Gateway wide marketing due to take place in early 2017. Sites sit within wider Northern Gateway where mixed use development (with a leisure focus) has taken place/s underway.	Amber	General viability issues associated with office development in the Borough, but this represents a prime, high profile location.	Amber	Deliverable
2	Northern Gateway - SE Quadrant	6.4	N	37,300	37,300	0	Single ownership, no occupiers	Green	NC1, Zone 1 (Northern Gateway/Severalls Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA NGA1, SA NGA2 and SA NGA3; and Development Policy DP5	Green	Council own land and are keen to promote B1 uses as well as blend of other complementary uses (inc res) as part of 'boulevard' concept	Amber	Available in Future	A greenfield site with limited existing infrastructure, although there is committed funding for broadband at the Northern Gateway.	Green	High profile location for University related occupiers and spin-outs (set within University Campus) but isolated from main road networks and other employment areas. Market interest in Phase I of Parkside development was slow and took time to occupy, mainly from university spin-offs. Nevertheless, the landowner (University) has aspirations to bring forward next phase of development at Parkside, and through new Innovation Centre (work due to commence 2016).	Amber	Not being actively marketed, no known developer interest.	Amber	General viability issues associated with office development in the Borough, but this represents a prime, high profile location.	Amber	Deliverable
3	Severalls (undeveloped plot)	2.2	N	8,864	8,864	0	Multiple ownership	Amber	NC1, Zone 1 (Northern Gateway/Severalls Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA NGA1, SA NGA2 and SA NGA3; and Development Policy DP5	Green	Landowner has recently marketed the site for B1 uses	Green	Available	None identified. Greenfield plot with existing servicing.	Green	An established and popular business location with low vacancy and good profile. Traffic and congestion can be a problem within Severalls given size of site, scale of occupiers and 'pinch points'.	Green	The site has been on the market for a number of years (c. 5) for high tech B1 use. Unlikely that the market is currently strong enough to bring development forward over short term.	Amber	General viability issues associated with B1 use in the Borough. No specific viability factors identified.	Amber	Deliverable
4	Knowledge Gateway - North Area	1.4	Y ¹	5,720	5,720	0	Single ownership, no occupiers	Green	Policy EC1, Zone 1 (Knowledge Gateway and University Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA EC7 (University of Essex Expansion); and Development Policy DP5	Green	Landowner is developing proposals to Parkside Phase II and Gateway Feature Buildings as part of University masterplan. This would constitute a B1a/B1c use.	Green	Available	No major cost factors identified	Green	High profile location for University related occupiers and spin-outs (set within University Campus) but isolated from main road networks and other employment areas. Market interest in Phase I of Parkside development was slow and took time to occupy, mainly from university spin-offs. Nevertheless, the landowner (University) has aspirations to bring forward next phase of development at Parkside, and through new Innovation Centre (work due to commence 2016).	Amber	Proposals for Phase II of Parkside office development being progressed by landowner and expected to come forward shortly.	Green	Unknown, but landowner/developer progression of scheme suggests viability	Amber	Deliverable
5	Knowledge Gateway - South Area	2.3	Y ²	3,562	3,562	0	Single ownership, no occupiers	Green	Policy EC1, Zone 1 (Knowledge Gateway and University Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA EC7 (University of Essex Expansion); and Development Policy DP6	Green	Proposals and planning permission for Innovation Centre linked to University (B1a/b use) (work due to commence 2016)	Green	Available	No major cost factors identified	Green	Planning permission secured for speculative Innovation Centre (linked to University), works due to commence in late 2016.	Green	Landowner/developer progression of scheme suggests viability.	Green	Deliverable		
6	Knowledge Gateway - West Area	3.3	N	13,256	13,256	0	Single ownership, no occupiers	Green	Policy EC1, Zone 1 (Knowledge Gateway and University Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA EC7 (University of Essex Expansion); and Development Policy DP7	Green	Proposed larger offices for R & D - B1a/b use linked to University	Green	Available in Future	No major cost factors identified	Green	Starway is not yet an established employment location and market appeal appears to be limited in the current climate. Stanway is not yet an established employment location and market appeal appears to be limited in the current climate. Toltgate South has reasonably high profile opposite Toltgate Business Park.	Amber	Not being actively marketed, no known developer interest.	Amber	General viability issues associated with B1 use in the Borough. No specific viability factors identified.	Amber	Marginal/Uncertain
7	Stanway - Stane Park	6.8	N	27,108	13,554	13,554	Multiple ownership*	Green	Policy WC1, Zone 1 (Stanway Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA STA3; and Development Policy DP5	Green	Mixed B use development.	Green	Available in Future	A greenfield site with limited existing infrastructure, although a new access road is to be provided through development of land to the south.	Green	Starway is not yet an established employment location and market appeal appears to be limited in the current climate. Stanway is not yet an established employment location and market appeal appears to be limited in the current climate. Toltgate South has reasonably high profile opposite Toltgate Business Park.	Amber	Not being actively marketed. Part of the site was recently lost to A1/A3 use with landowner citing lack of demand for B uses.	Amber	Landowner suggests that development of site to south would help remainder of site come forward by providing access road.	Amber	Marginal/Uncertain
8	Stanway - Toltgate South	3.5	N	13,904	6,952	6,952	Single ownership, no occupiers	Green	Policy WC1, Zone 1 (Stanway Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA STA3; and Development Policy DP5	Green	Landowner promoting other uses - leisure use as part of Toltgate Village development	Red	Available in Future	No major cost factors identified	Green	Starway is not yet an established employment location and market appeal appears to be limited in the current climate. Stanway is not yet an established employment location and market appeal appears to be limited in the current climate. Toltgate South has reasonably high profile opposite Toltgate Business Park.	Amber	Not being actively marketed, no known developer interest.	Amber	Unknown.	n/a	Marginal/Uncertain
9	Stanway - Lakelands West	4.0	N	16,084	0	16,084	Single ownership, no occupiers	Green	Policy WC1, Zone 1 (Stanway Strategic Economic Area)	Core Strategy Policies CE1 and CE3; SA STA3; and Development Policy DP5	Green	Representations submitted to Local Plan Preferred Options consultation indicate landowner aspiration to promote the site for 51 homes and 4.8 ha of employment space.	Amber	Available in Future	No major cost factors identified	Green	Starway is not yet an established employment location and market appeal appears to be limited in the current climate. Lakelands West lacks visibility and there are higher profile sites available in Stanway.	Red	Marketed intensively (for c.10 weeks) but received no interest. Part of the site now proposed for residential use in emerging Local Plan.	Red	Unknown.	n/a	Marginal/Uncertain
10	Stanway - Trafalgar Farm	1.4	N	5,464	0	5,464	Single ownership, single occupier	Green	None	Core Strategy Policies CE1 and CE3; SA STA3; and Development Policy DP5	Amber	Representations to Local Plan Preferred Options consultation confirm landowner aspiration for site to be allocated for employment use (specific type of employment use not confirmed).	Green	Available in Future	Existing farm buildings would need to be demolished. Otherwise no major cost factors identified.	Green	Starway is not yet an established employment location and market appeal appears to be limited in the current climate. Trafalgar Farm lacks visibility and there are higher profile sites available in Stanway.	Red	Not being actively marketed, no known developer interest.	Amber	Unknown.	n/a	Marginal/Uncertain
11	Whitehall Industrial Estate (undeveloped plot)	2.3	N	9,200	0	9,200	Single ownership, no occupiers	Green	SG4 (Local Economic Areas) Place Policy Reference EC3	Core Strategy Policies CE1 and CE3; and Development Policy DP5.	Green	Representations submitted to Local Plan Preferred Options consultation confirm landowner aspiration for site to be part de-allocated, so as to allow part of the site to be developed for residential to help deliver the employment land.	Amber	Available in Future	Range of potential factors identified including topographical, sewage and access issues.	Amber	An established industrial area with generally low vacancy. Attractive location for lower value 'dirty' industrial uses. Predominantly older buildings commanding low rents. Poor access to strategic road network.	Amber	Not being actively marketed, no known developer interest.	Amber	The site is subject to a number of constraints which are considered to render its use for solely employment purposes potentially unviable. The part de-allocation of the site for residential could help to support delivery of employment lands in the future.	Amber	Marginal/Uncertain
12	Maldon Road inc Shrub End Depot	0.8	N	3,156	0	3,156	Single ownership, no occupiers	Green	SG4 (Local Economic Areas) Place Policy Reference WC4	Core Strategy Policies CE1 and CE3; and Development Policy DP5	Green	Council own land and are keen to promote mixed industrial / employment uses.	Green	Available in Future	There are potential contamination issues, which may require remediation prior to development.	Amber	Low profile as an employment location, situated on the outskirts of Colchester town away from established employer areas and strategic road access.	Red	Not being actively marketed, no known developer interest.	Amber	None identified.	n/a	Marginal/Uncertain
13	Tiptree - Tower Business Park	1.5	N	6,156	3,078	3,078	Multiple ownership	Amber	SG4 (Local Economic Areas) Place Policy Reference SS15	Core Strategy Policies CE1 and CE3; and Development Policy DP5	Green	Unknown	n/a	Available in Future	No major cost factors identified	Green	Site adjoins an established well performing business park on the edge of Tiptree village. Attractive location for local occupiers.	Amber	Not being actively marketed, no known developer interest.	Amber	None identified.	n/a	Marginal/Uncertain
14	Lodge Lane Langham	1.0	N	4,000	2,000	2,000	Single ownership, no occupiers	Green	None	None	Amber	Call for Sites form submitted by landowner in 2014 indicates that there is 'potential for significant Office/Light Industrial space and parking'. This would be a B1a and/or B1c use. A representation submitted to Local Plan Preferred Options consultation proposed that Lodge Lane be allocated as an employment site.	Green	Available in Future	A greenfield site with potential infrastructure requirements although no major cost factors identified	Green	Site adjoins an established well performing business park to the north of the A12. Attractive location for occupiers wanting a rural location although access and public transport is poor.	Amber	The site has not been actively marketed although landowner has received enquiries about expansion from an existing/nearyby occupier.	Amber	Some viability issues associated with upgrading utilities provision.	Amber	Deliverable
15	Town Centre - Sheepen Place	0.7	Y ³	3,160	3,160	0	Single ownership, no occupiers	Green	SG4 (Local Economic Areas) Place Policy Reference TC3	Core Strategy Policy CE2 (Mixed Use Centres)	Green	The site has planning permission for two office buildings to be built in phases	Green	Available	A brownfield site with no major cost factors identified	Green	Colchester town centre is an established location for employment uses including office uses.	Green	Phase I is under construction and is due to be completed in spring 2017	Green	None identified.	n/a	Deliverable
TOTAL		39.4		167,466	107,978	59,488											* Based on consultation with Whybrow Chartered Surveyors & Property Consultants (sites 1 to 14 only)						

¹ Outline permission granted in 2006 for mixed use development including an extension to the Research Park (B1), residential development, student residences and other uses (ref. OICOL/05/2046). Reserved matters were approved in 2010 (ref. ² Planning permission granted in 2015 for the erection of three storey Innovation Centre with plaza to front and temporary car park to rear; with ancillary substation, cycle stores and hard and soft landscaping all as shown on application drawings (ref. 152218 ³ Planning permission granted in 2015 for phased development of two new office buildings and associated outbuildings, parking and landscaping (ref. 151825).

* Site has two owners who are in a consortium/partnership.

Colchester Employment Land Supply Trajectory

Site Details							Indicative Delivery Trajectory (m ²)										Indicative Delivery Trajectory (hectares)										Overall Assessment	Notes	Plot Ratio Assumptions (Consistent with 2015 ELNA)
Site Ref	Site Name	Size (ha)	Planning permission? (Y/N)	Potential New Floorspace (m ²)			Assumed Employment Use	Short term (0 - 5 years) 2017-2022			Medium term (6 - 10 years) 2022-2027			Long term (11 - 16 years) 2027-2033			Assumed Employment Use	Short term (0 - 5 years) 2017-2022			Medium term (6 - 10 years) 2022-2027			Long term (11 - 16 years) 2027-2033					
				Total	Offices (B1a/b)	Industrial (B1c/B2/B8)		Total	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total	Offices (B1a/b)	Industrial (B1c/B2/B8)		Total	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total	Offices (B1a/b)	Industrial (B1c/B2/B8)						
1	Northern Gateway - NE Quadrant	1.8	N	10,532	10,532	0	100% office (B1a/b)	0	0	0	10,532	10,532	0	0	0	0	100% office (B1a/b)	0.0	0.0	0.0	1.8	1.8	0.0	0.0	0.0	0.0	Available in the future and deliverable	Prime site considered by CBC to be worthy of protection for B uses. The NW quadrant site of the Northern Gateway has outline planning permission (ref. O/COL/01/1622) and reserved matters approval (ref. 160623) for 10,400 sqm restaurant units (Use Class A3), a 80 bed hotel (Use Class C1) and landscaping.	Office floorspace capacity figure provided by CBC.
2	Northern Gateway - SE Quadrant	6.4	N	37,300	37,300	0	100% office (B1a/b)	37,300	37,300	0	0	0	0	0	0	0	100% office (B1a/b)	6.4	6.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	Available in the future and deliverable	CBC is seeking a blend of uses on the wider SE Quadrant site, providing an 'urban feel'. Therefore, as well as B1a/b office space, CBC is willing to allow other uses (such as resi and a Care Home) to complement B uses. The NW quadrant site of the Northern Gateway has outline planning permission (ref. O/COL/01/1622) and reserved matters approval (ref. 160623) for 10,400 sqm restaurant units (Use Class A3), a 80 bed hotel (Use Class C1) and landscaping.	Office floorspace capacity figure provided by CBC.
3	Severalls (undeveloped plot)	2.2	N	8,864	8,864	0	100% office (B1a/b)	0	0	0	8,864	8,864	0	0	0	0	100% office (B1a/b)	0.0	0.0	0.0	2.2	2.2	0.0	0.0	0.0	Available and deliverable	Ownership is split between CBC and a commercial developer. Traffic in the area of Severalls surrounding the site is a key constraint. The site would benefit from improved public transport provision.	100% low density business park - plot ratio of 0.4 (40%)	
4	Knowledge Gateway - North Area	1.4	Y ¹	5,720	5,720	0	100% office (B1a/b)	5,720	5,720	0	0	0	0	0	0	0	100% office (B1a/b)	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	Available and deliverable	University of Essex website suggests that planning permission has been granted in 2016 for Phase II of Parkside (16,000sq.ft of office space) although no record of this on Council Planning Portal.	100% low density business park - plot ratio of 0.4 (40%)	
5	Knowledge Gateway - South Area	2.3	Y ²	3,562	3,562	0	100% office (B1a/b)	3,562	3,562	0	0	0	0	0	0	0	100% office (B1a/b)	2.3	2.3	0.0	0.0	0.0	0.0	0.0	0.0	Available and deliverable	Work on new £10 million Innovation Centre due to commence December 2016, for completion in 2018.	Floorspace figure taken from planning permission for Innovation Centre (ref. 152219). Scope for additional B class development on rest of site area over the longer term.	
6	Knowledge Gateway - West Area	3.3	N	13,256	13,256	0	100% office (B1a/b)	0	0	0	13,256	13,256	0	0	0	0	100% office (B1a/b)	0.0	0.0	0.0	3.3	3.3	0.0	0.0	0.0	Available in the future, but deliverability marginal/uncertain	Access to Knowledge Gateway is relatively constrained although proposed East Colchester Garden Community will help to address some of these issues.	100% low density business park - plot ratio of 0.4 (40%)	
7	Stanway - Stane Park	6.8	N	27,108	13,554	13,554	50% office (B1a/b) 50% industrial (B1c/B2/B8)	0	0	0	27,108	13,554	13,554	0	0	0	50% office (B1a/b) 50% industrial (B1c/B2/B8)	0.0	0.0	0.0	6.8	3.4	3.4	0.0	0.0	0.0	Available in the future, but deliverability marginal/uncertain	Portion of land adjoining site to the west due to be de allocated due to deliverability issues. Potential noise constraint due to proximity to A12. Landowner intentions currently unclear. There are preferential sites in Colchester (inc Northern Gateway, Severalls) but Stane Park represents best prospect in Stanway. A 46 ha site to the west of Stane Park is being promoted for residential-led development, including employment floorspace and a primary school.	100% low density business/industrial park - plot ratio of 0.4 (40%)
8	Stanway - Tollgate South	3.5	N	13,904	6,952	6,952	50% office (B1a/b) 50% industrial (B1c/B2/B8)	0	0	0	13,904	6,952	6,952	0	0	0	50% office (B1a/b) 50% industrial (B1c/B2/B8)	0.0	0.0	0.0	3.5	1.7	1.7	0.0	0.0	0.0	Available in the future, but deliverability marginal/uncertain	Considered second preference to Stane Park within the wider Stanway area.	100% low density business/industrial park - plot ratio of 0.4 (40%)
9	Stanway - Lakelands West	4.0	N	16,084	0	16,084	100% industrial (B1c/B2/B8)	0	0	0	16,084	0	16,084	0	0	0	100% industrial (B1c/B2/B8)	0.0	0.0	0.0	4.0	0.0	4.0	0.0	0.0	Available in the future, but deliverability marginal/uncertain	Site boundary has been re-drawn/squared-off for the purposes of this analysis.	100% low density business/industrial park - plot ratio of 0.4 (40%)	
10	Stanway - Trafalgar Farm	1.4	N	5,464	0	5,464	100% industrial (B1c/B2/B8)	0	0	0	0	0	0	5,464	0	5,464	100% industrial (B1c/B2/B8)	0.0	0.0	0.0	0.0	0.0	0.0	1.4	0.0	1.4	Available in the future, but deliverability marginal/uncertain	Site has previously been in agricultural use, but the landowner now wishes to bring the site forward for employment use.	100% low density business/industrial park - plot ratio of 0.4 (40%)
11	Whitehall Industrial Estate (undeveloped plot)	2.3	N	9,200	0	9,200	100% industrial (B1c/B2/B8)	0	0	0	0	0	0	9,200	0	9,200	100% industrial (B1c/B2/B8)	0.0	0.0	0.0	0.0	0.0	0.0	2.3	0.0	2.3	Available in the future, but not deliverable	The site has been allocated for employment use for over 20 years but is subject to a number of constraints which render its use for 100% employment purposes unviable. Landowner has requested part of the site is deallocated to enable residential development to come forward to address overall site viability.	100% low density industrial park - plot ratio of 0.4 (40%)
12	Maldon Road inc Shrub End Depot	0.8	N	3,156	0	3,156	100% industrial (B1c/B2/B8)	0	0	0	0	0	0	3,156	0	3,156	100% industrial (B1c/B2/B8)	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.8	Available in the future, but deliverability marginal/uncertain	Site is owned by CBC who previously explored options for a new industrial scheme (to include non B uses too) on site but this was concluded to be unviable. May be a candidate for public sector funding to unlock commercial development here.	100% low density industrial park - plot ratio of 0.4 (40%)
13	Tiptree - Tower Business Park	1.5	N	6,156	3,078	3,078	50% office (B1a/b) 50% industrial (B1c/B2/B8)	0	0	0	6,156	3,078	3,078	0	0	0	50% office (B1a/b) 50% industrial (B1c/B2/B8)	0.0	0.0	0.0	1.5	0.8	0.8	0.0	0.0	0.0	Available in the future, but deliverability marginal/uncertain	Site is split - two owners. The Neighbourhood Plan Group for Tiptree is considering recommending the area for housing given that this undeveloped site has yet to come forward for employment uses.	100% low density business/industrial park - plot ratio of 0.4 (40%)
14	Lodge Lane Langham	1.0	N	4,000	2,000	2,000	50% office (B1a) 50% industrial (B1c)	0	0	0	4,000	2,000	2,000	0	0	0	50% office (B1a) 50% industrial (B1c)	0.0	0.0	0.0	1.0	0.5	0.5	0.0	0.0	0.0	Available in the future and deliverable	This greenfield site is flat and is surrounded by mature hedges.	100% low density business/industrial park - plot ratio of 0.4 (40%)
15	Town Centre - Sheepen Place	0.7	Y ³	3,160	3,160	0	100% office (B1a/b)	3,160	3,160	0	0	0	0	0	0	0	100% office (B1a/b)	0.7	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	Available and deliverable		Floorspace figure taken from planning permission for two office buildings (ref. 151825).
TOTAL		39.4		167,466	107,978	59,488	TOTAL	49,742	49,742	0	99,904	58,236	41,668	17,820	0	17,820	TOTAL	10.8	10.8	0.0	24.1	13.7	10.4	4.5	0.0	4.5			

Garden Communities (not included in the trajectory)

Site Details							Availability							Deliverability										
Site Ref	Site Name	Size (ha)	Planning permission? (Y/N)	Potential New Floorspace (m ²)			Ownership and Occupation	RAG Assessment	Planning Status (Preferred Options Local Plan 2017 - 2033)	Planning Status (Adopted Local Plan Core Strategy 2001 - 2021)	RAG Assessment	Developer / Landowner Aspirations	RAG Assessment	Overall Availability		Cumulative or Abnormal Cost / Delivery Factors?	RAG Assessment	Economic Viability / Market Factors						Overall Deliverability
				Total	Offices (B1a/b)	Industrial (B1c/B2/B8)												Market Attractiveness of Locality *	RAG Assessment	Active marketing / known developer interest? *	RAG Assessment	Viability Factors	RAG Assessment	
16	Colchester Braintree Borders	1.7	N ⁴	6,858	6,858	0	Multiple ownership	Amber	Policy SP7 (Development and delivery of new garden communities in North Essex); SP9 (West of Colchester/East Braintree new- West Colchester Garden Community	None	Green	Colchester Braintree Borders is identified as a strategic area for development of a new garden community. The Masterplan will incorporate: - Around 2,500 residential dwellings within the Plan period - Provision for Gypsy and Traveller and Travelling showpeople - Land for B1 and/or employment generating floorspace - A district centre and neighbourhood centres - Primary schools and a secondary school	Green	Available in Future		Development of employment floorspace is contingent on wider masterplan coming forward for the Garden Community	Amber	Unknown - currently an untested market location	n/a	Unknown	n/a	None identified.	n/a	Unknown
17	Tendring Colchester Borders	2.8	N ⁵	11,276	11,276	0	Multiple ownership	Amber	Policy SP7 (Development and delivery of new garden communities in North Essex); SP8 (East Colchester/West Tendring new University Garden Village)	None	Green	Tendring Colchester Borders is identified as a strategic area for development of a new garden community. The Masterplan will incorporate: - Around 2,500 residential dwellings within the Plan period - Land for employment generating development - Neighbourhood centres - Primary schools and a secondary school	Green	Available in Future		Development of employment floorspace is contingent on wider masterplan coming forward for the Garden Community	Amber	Unknown - currently an untested market location	n/a	Unknown	n/a	None identified.	n/a	Unknown
TOTAL		4.5		18,134	18,134	0																		

⁴ The site area for Colchester Braintree Borders is based on an indicative land area required for the job growth under Scenario 3b. This is based on a low density business park plot ratio of 0.4.

⁵ The site area for Tendring Colchester Borders is based on an indicative land area required for the job growth under Scenario 3b. This is based on a low density business park plot ratio of 0.4.

Garden Communities (not included in the trajectory)

Site Details							Indicative Delivery Trajectory (m²)									Indicative Delivery Trajectory (hectares)									Overall Assessment	Notes	Plot Ratio Assumptions (Consistent with 2015 ELNA)		
Site Ref	Site Name	Size (ha)	Planning permission? (Y/N)	Potential New Floorspace (m³)			Assumed Employment Use	Short term (0 - 5 years)			Medium term (6 - 10 years)			Long term (11 - 16 years)			Assumed Employment Use	Short term (0 - 5 years)			Medium term (6 - 10 years)			Long term (11 - 16 years)					
				Total	Offices (B1a/b)	Industrial (B1c/B2/B8)		Total	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total	Offices (B1a/b)	Industrial (B1c/B2/B8)		Total	Offices (B1a/b)	Industrial (B1c/B2/B8)	Total	Offices (B1a/b)	Industrial (B1c/B2/B8)						
16	Colchester Braintree Borders	1.7	N ⁴	6,858	6,858	0	100% office (B1a/b)	0	0	0	3,429	3,429	0	3,429	3,429	0	100% office (B1a/b)	0.0	0.0	0.0	0.9	0.9	0.0	0.9	0.9	0.0	Available in the future, but deliverability unknown	In relation to employment, the Preferred Options Local Plan states: "Provision for B1 and/or non B class employment generating uses around the rail station as part of mixed use urban development to provide for a wide range of local employment opportunities where appropriate"	Floorspace assumptions taken from North Essex Garden Communities Employment & Demographic Studies - Draft Final Report. Floorspace figures taken from Scenario 3b (Potential Unlocked). This is the most optimistic scenario in terms of job creation and B Class floorspace. If job growth is more aligned with other scenarios then employment floorspace requirements will be lower. Hectare figure based on low density business park - plot ratio of 0.4 (40%)
17	Tendring Colchester Borders	2.8	N ⁵	11,276	11,276	0	100% office (B1a/b)	0	0	0	5,638	5,638	0	5,638	5,638	0	100% office (B1a/b)	0.0	0.0	0.0	1.4	1.4	0.0	1.4	1.4	0.0	Available in the future, but deliverability unknown	In relation to employment, the Preferred Options Local Plan states: "5. Provision for B1 and/or non B class employment generating uses towards the south of the site in proximity to the existing University of Essex and Knowledge Gateway, to provide for a wide range of local employment opportunities where appropriate; "6. Provision for B1, B2 and B8 businesses to the north of the site close to the A120"	Floorspace assumptions taken from North Essex Garden Communities Employment & Demographic Studies - Draft Final Report. Floorspace figures taken from Scenario 3b (Potential Unlocked). This is the most optimistic scenario in terms of job creation and B Class floorspace. If job growth is more aligned with other scenarios then employment floorspace requirements will be lower. Hectare figure based on low density business park - plot ratio of 0.4 (40%)
TOTAL		4.5		18,134	18,134	0	TOTAL	0	0	0	9,067	9,067	0	9,067	9,067	0	TOTAL	0.0	0.0	0.0	2.3	2.3	0.0	2.3	2.3	0.0			

⁴ The site area for Colchester Braintree Borders is based on an indicative land area required for the job growth under Scenario 3b. This is based on a low density business park plot ratio of 0.4.

⁵ The site area for Tendring Colchester Borders is based on an indicative land area required for the job growth under Scenario 3b. This is based on a low density business park plot ratio of 0.4.

Appendix 3: Discounted Sites

The following sites are listed within the Preferred Options Local Plan Policy SG3 'Economic Growth Provision and Centre Hierarchy' as having potential to accommodate new employment land provision but, based on analysis, have been excluded from the delivery trajectory.

Site Name	Status (Preferred Options Local Plan)	Reason for Excluding from Delivery Trajectory
Westside Centre, Stanway	Policy SG3 and WC1 Stanway Strategic Economic Area	The sites are fully developed with no immediate scope to accommodate new employment development
Tollgate Business Park, Stanway		
Former Sainsbury's site, Stanway		Decisions regarding future use of site will be affected by pending appeal decision
Tollgate, Stanway		The site is largely built out with non B class uses, no immediate scope to accommodate new employment development
Clarendon Way, Colchester	Policy SG3 and SG4 (Local Economic Area)	The sites are fully developed with no immediate scope to accommodate new employment development
Davey Close, Hythe		
The Hythe	Policy SG3 (Local Economic Area)	
Anderson's Site, Marks Tey	Policy SG4 (Local Economic Area)	Uncertainty over the deliverability of the site.

Source: Lichfields / Colchester Borough Council

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
edinburgh@lichfields.uk

Leeds
0113 397 1397
leeds@lichfields.uk

London
020 7837 4477
london@lichfields.uk

Manchester
0161 837 6130
manchester@lichfields.uk

Newcastle
0191 261 5685
newcastle@lichfields.uk

Thames Valley
0118 334 1920
thamesvalley@lichfields.uk