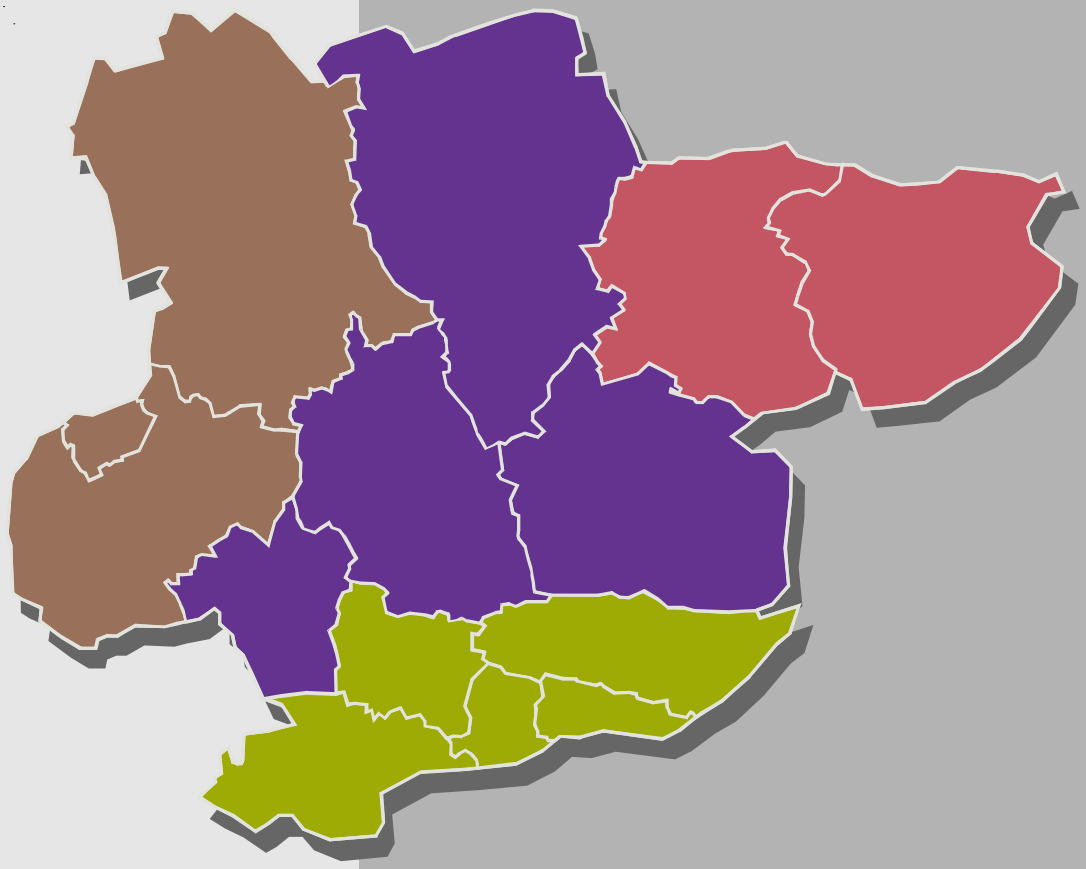
Strategic Countywide Economic & Housing Issues

Essex Issues Paper
August 2009



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Essex Chief Executives' Association
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Executive Summary & Purpose of this Document

Essex is a thriving and prosperous County – home to 1.6 million people, over 50,000 businesses that support 600,000 jobs, and a key commercial gateway to Europe and the world.

The County faces major challenges in the period to 2021 and beyond, which have in the past few months been amplified by the economic conditions now faced within the UK. As the key driver of economic and housing growth within the East of England, Essex is being asked to deliver 131,000 jobs and 127,000 homes in the period 2001 – 2021. The Review of the East of England Plan may well lead to Essex being asked to deliver at or beyond these levels of growth in the period from 2021 onwards.

Essex has traditionally taken a significant proportion of economic and housing growth without benefiting from the necessary infrastructure improvements to enable growth to take place in a truly planned and sustainable manner. It is estimated that the cost of delivery of supporting infrastructure across Essex is some £7.6 billion, with an identified funding gap of £6.5 billion. Clearly, if Essex is to deliver the levels of growth expected of it within the East of England Plan then this gap will need to be closed and far greater levels of infrastructure investment in Essex will need to be made than has been the case historically.

Essex, in broad terms, accepts the growth that it is being asked to deliver, but only where this can lead to sustainable communities and where this is supported by the necessary investment in supporting infrastructure. Significant progress is being made across the County in delivering housing and economic growth, which in the current development plan context is being focused on the six Key Centres for Development and Change (Basildon, Harlow, Chelmsford, Southend, Thurrock and Colchester) and supported by more modest growth within the sub-regional centres. Such an approach is considered to be the most sustainable way to accommodate growth within Essex, certainly in the period to 2021 (provided the necessary supporting infrastructure is delivered) and potentially in the period beyond 2021, although this will need to be tested through the East of England Plan Review and the emerging Single Regional Strategy.

This specific piece of work identifies the main economic and housing issues currently being faced across Essex. It recognises and promotes the concept of four Essex sub-regions – Haven Gateway, Heart of Essex, Thames Gateway and M11 Corridor as the future spatial structure for economic change. All 14 districts and unitaries within Essex have been involved in the work and the findings will be used to not only inform the Review of the East of England Plan, but also make the case for the increased investment from central and regional Government that Essex requires if it is going to be successful in delivering sustainable growth in the period to 2021 and the years beyond.

The document has not been written to replace existing adopted policy at either the county or district level, but rather to inform the debate as the Single Regional Strategy and its implications for Essex and the Essex districts / unitaries emerges. National, regional and local policy making is dynamic and subject to almost constant change. It will always be challenging for a piece of work like this to be wholly up to date, but nevertheless this is the first time such a comprehensive piece of work has been produced.

Different authorities may wish to use the document in different ways, for example to form the basis for individual authority discussions with elected members on place shaping in their areas. The document does however have the potential to be used for collective lobbying purposes and particularly for making the case for the critical investment in Essex that is required in the next 15 - 20 years. Subject to consensus across the County, it is a piece of work that could evolve over time and be updated and refreshed on a regular basis. It is recognised in this context that Essex is complex - comprising two unitaries, 12 districts and one county council who together are responsible for a variety of functions that are collectively critical to housing and economic growth.

1 Introduction and context

1.1 Essex has already played and will continue to play a major role in contributing to the country's economic growth and housing needs. With a current population of over 1.6 million people (which is forecast to grow to over 2 million by 2031) and supporting over 600,000 jobs, the County is without doubt the economic powerhouse of the East of England and this position will be reinforced in the coming years.

1.2 The regional role that Essex is expected to play is clearly identified within the East of England Plan (May 2008) which sets a target for the County of 131,000 jobs (nearly 30% of the regional total) and 127,000 homes (25% of the regional total). Indeed, of the 21 Key Centres for Development and Change (the primary drivers of growth in the region) identified in the East of England Plan, six (Basildon, Chelmsford, Colchester, Harlow, Southend and Thurrock) are within Essex. The current economic downturn is going to present additional challenges to the delivery of growth, certainly in the next 2-3 years.

1.3 With a Review of the East of England Plan for the period up to 2031 now underway, it is critical that Essex's position in terms of housing and economic issues is articulated as part of this process. Accordingly, the Essex Chief Executives' Association established a sub-group to consider housing and economic issues across the County and the four sub-regions of Essex – Haven Gateway (Colchester and Tendring), Heart of Essex (Chelmsford, Braintree, Maldon and Brentwood), Thames Gateway South Essex (Southend, Thurrock, Basildon, Rochford, Castle Point) and the M11 Corridor (Harlow, Uttlesford and Epping). It is important that across all authorities there is full recognition of the factors (including opportunities and constraints) that will affect delivery across the sub-regions and ultimately will be crucial to identifying potential for future growth. Traditionally there has been a legacy of unrealistic growth being imposed without being accompanied by the necessary enabling infrastructure.

1.4 This study recognises and promotes the concept of sub-regions within Essex and identifies four (see Figure 1) that are considered to reflect the pattern of economic / social activity on the ground and which will influence the spatial pattern of future growth. Each of the four sub-regions has at least one of the KCDCs as its focus. It is recognised that whilst the approach taken has identified four sub-regions that include the entirety of districts within them, the reality is that these sub-regions have far more complex zones of influence and for most geographical areas it is indeed necessary to consider how they interact beyond and across the four identified sub-regions. For example, people living in the north of Braintree and Uttlesford districts are very much influenced by the Cambridge sub-region. For some, the sub-regions identified in this paper cross county boundaries, specifically the M11 Corridor which crosses into Hertfordshire and the Haven Gateway which crosses into Suffolk. The relationship that this results in and the implications for future growth need to be taken into account. This is represented within Figure 2.

1.5 The Study was undertaken during the Autumn of 2008 and consisted of three stages:

Stage 1 (September 2008)

The completion of an economic and housing issues visioning questionnaire completed by all the districts and unitaries.

Stage 2 (October 2008)

The compilation of 4 Sub- Regional Position Papers, led by the four sub-regional leads (Harlow for the M11 Corridor, Colchester for the Haven Gateway, Chelmsford for the Heart of Essex and Basildon for Thames Gateway South Essex). These are included as the Appendices to this document.

Stage 3 (November / December 2008)

The preparation of an Essex Position Paper based upon the earlier four sub-regional papers to create an overall approach for Essex to agree priorities for future action / infrastructure investment to ensure future sustainable growth.

Stage 4 (January / February 2009)

Further input from around Essex following the production of the first draft and the production of a revised draft - this document.

Stage 5 (March - July 2009)

An initial draft of the document was presented to the Essex Chief Executives' Association in March following which further input across Essex has led to this current version of the Issues Paper.

The geographical areas of the four Essex sub-regions are shown in Figure 1.

1.6 This Issues Paper therefore sets out a way forward on reaching consensus on managing the County's future housing and economic growth. It identifies a number of major issues that will need to be tackled and particularly supports Essex's claims for the necessary infrastructure investment that is critical to the sustainable delivery of growth to 2021 and beyond.

1.7 Specifically, this work has focused on existing patterns of growth across Essex, where growth is planned to take place in the period to 2021 and where infrastructure provision is critical to the delivery of this growth. It is absolutely clear that there will need to be a significant increase in investment in some of the key elements of infrastructure throughout the County, if Essex is to be successful in achieving planned levels of growth. These key investments are identified within this document (on page 15). The infrastructure deficit within Essex is well documented and this piece of work has been carried out in the context of identifying where critical pieces of infrastructure provision can release further economic and housing capacity in a sustainable way. This work could also form a useful input into developing Integrated Development Programmes within the County.


Figure 1
The Essex Sub regions
Uttlesford
Braintree
Colchester
Tendring
M11
Corridor
Heart of
Essex
Haven Gateway
(Essex)
Harlow
Epping Forest
Chelmsford
Maldon
Brentwood
Basildon
Rochford
Castle
Point
Southend
-on-Sea
Thames Gateway
(South Essex)
Thurrock

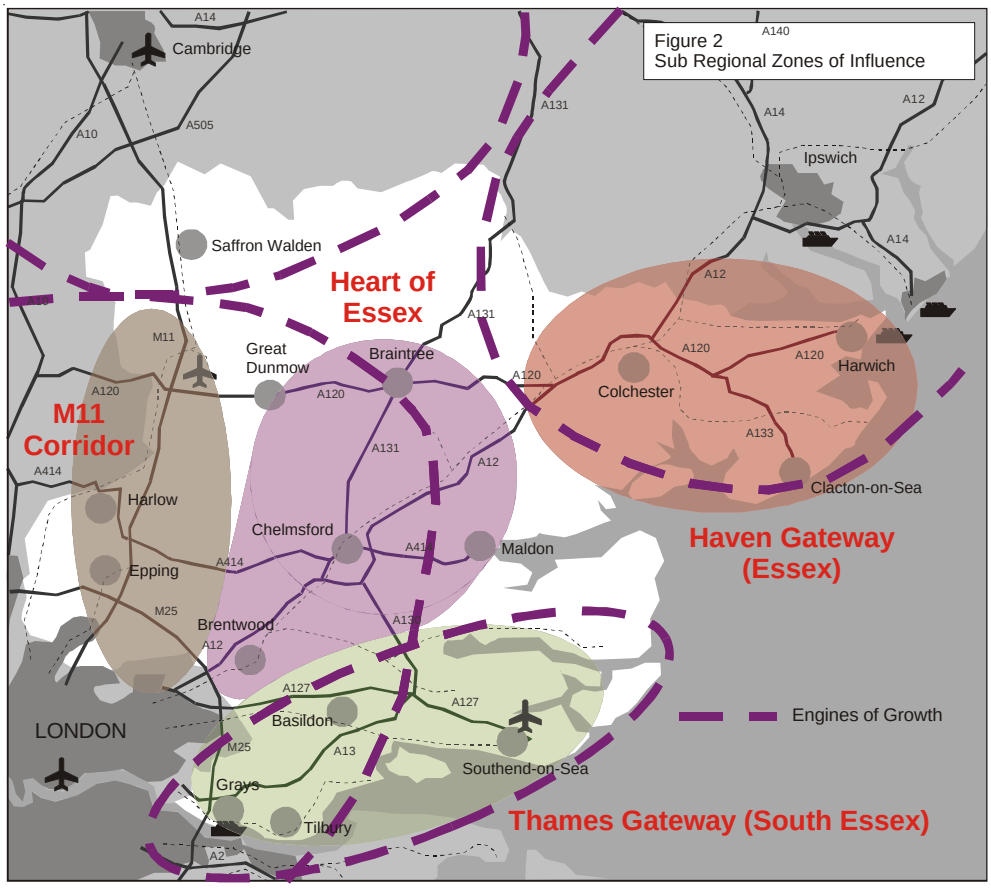


Figure 2
Sub Regional Zones of Influence
Cambridge
Ipswich
Saffron Walden
Heart of
Essex
Great
Dunmow
Braintree
Colchester
Harwich
M11
Corridor
Harlow
Chelmsford
Maldon
Clacton-on-Sea
Haven Gateway
(Essex)
Epping
Brentwood
LONDON
Basildon
Southend-on-Sea
Grays
Tilbury
Engines of Growth
Thames Gateway (South Essex)

2 A Vision for Essex

2.1 Each authority within Essex has its own vision. What is common across the whole of Essex are the following drivers:

a) to maintain and enhance people's quality of life
b) to deliver economic prosperity and sustained economic growth
c) to accept growth, but where this is matched by investment in infrastructure
d) to protect natural landscapes, historic assets, open space and other environmental assets
e) to make the best use of Essex's "unique selling points" to the County's best advantage

2.2 Whilst these drivers are not presented in any order of priority, this work has been produced primarily to address how Essex can deliver sustainable growth matched by infrastructure investments in the coming years. It may also be used to inform and link to the implementation of the Essex Sustainable Community Strategy and indeed the Sustainable Community Strategies of the districts and unitaries and the development of Integrated Development Programmes.

2.3 For the purposes of this document it is suggested based upon the work across the four sub-regions that the following could be developed as a long term vision for managing growth in Essex:

"To build on the individual and collective strengths of the Essex authorities to develop a progressive and prosperous County that continues to be the economic powerhouse of the East of England and gateway to Europe, where sustainable growth is matched by infrastructure investment and the protection of the natural and historic environment. It is the authorities' common goal that Essex shall be at the forefront of securing sustainable development which meets the needs of its communities up to 2031 and beyond."

2.4 The individual and sub-regional visions across Essex are set out in the four Sub-Regional Position Papers contained in the Appendix to this document.

3 The key drivers of growth in Essex

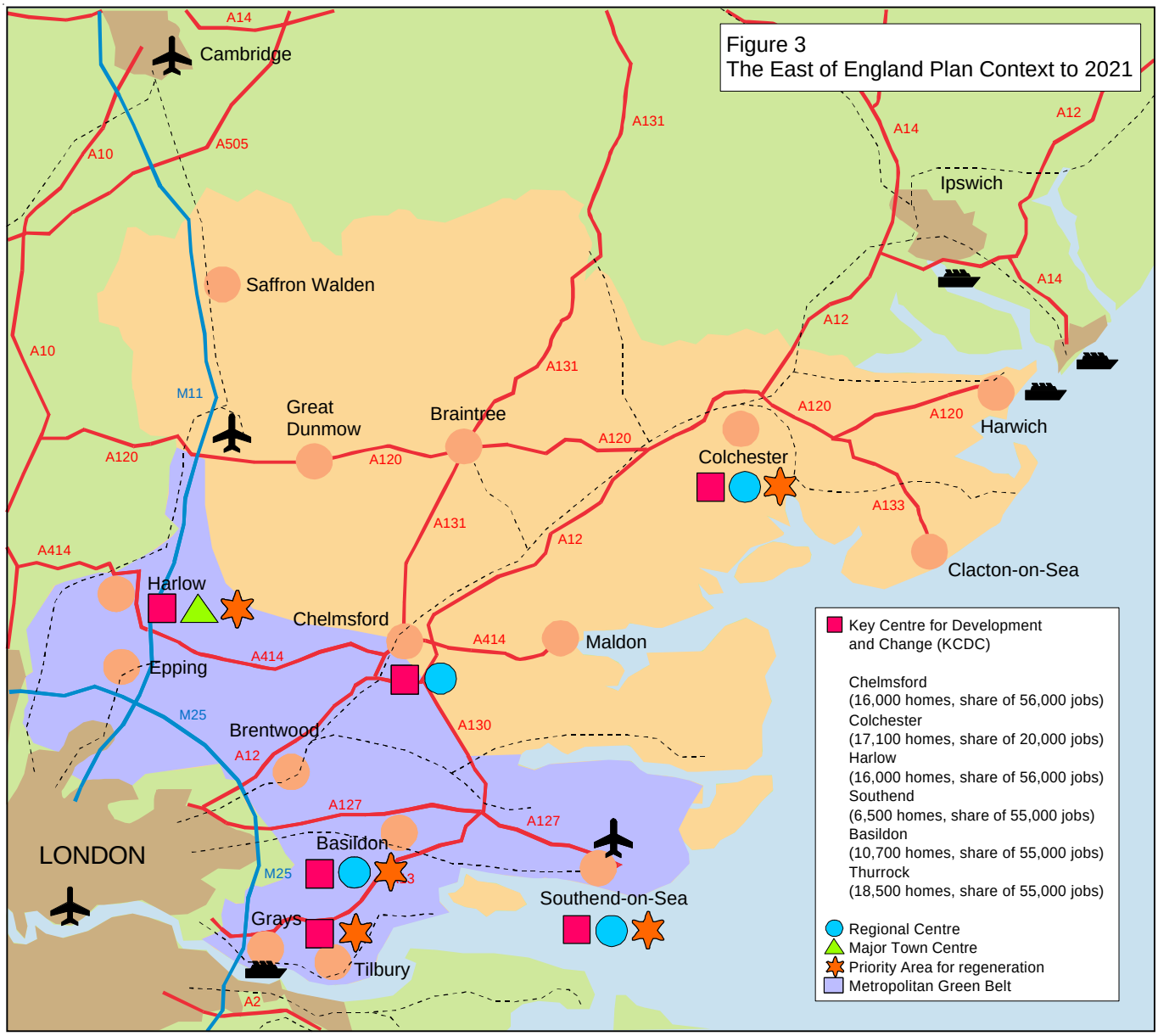
3.1 The East of England Plan and its review

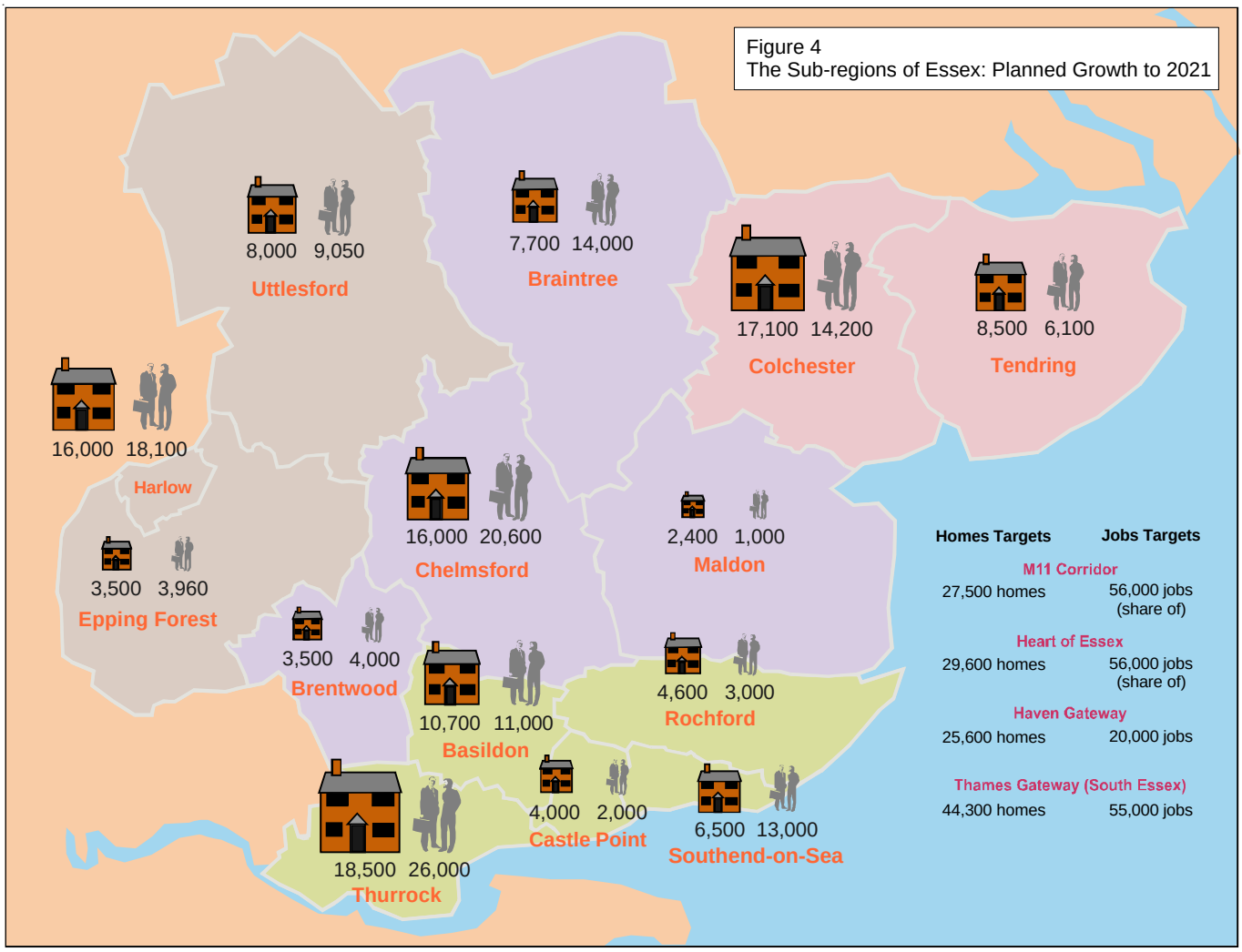
3.2 The approved East of England Plan places a considerable emphasis upon Essex in terms of meeting national economic and housing growth targets. Within Essex, the Plan proposes the delivery of 127,000 homes and 131,000 jobs in the period 2001-2021. This in itself is a significant challenge, particularly in the light of the economic downturn being experienced globally, national and locally. Nevertheless, the proposed spatial distribution of this growth focuses on the Key Centres for Development and Change. Together the six KCDCs within Essex (Chelmsford, Colchester, Thurrock,Southend, Harlow and Basildon) are expected to deliver over 65% of the total Essex housing growth and the bulk of employment growth, and it is within these locations where the most significant infrastructure investment is needed if this is to be achieved. It is however recognised that beyond the KCDC's other parts of Essex and the settlements therein have in the past, and will continue to in the future, made significant contributions to housing and economic growth, and investment and infrastructure in these locations is also critical to the sustainable development of Essex,

Geographical Location Key Centres for Development and Change	Homes Target 2001 - 2021	Jobs Target 2001 - 2021 (Including District Figures where known)	
Basildon	10,700	11,000	Share of 55,000
Chelmsford	16,000	20,600	Share of 56,000
Colchester	17,100	14,200	Share of 20,000
Harlow	16,000	18,100	Share of 56,000
Southend	6,500	13,000	Share of 55,000
Thurrock	18,500	26,000	Share of 55,000
Other Locations			
Braintree	7,700	14,000 (2008 - 2025 period)	Share of 56,000
Brentwood	3,500	4,000	Share of 56,000
Castle Point	4,000	2,000	Share of 55,000
Epping	3,500	3,960	Share of 56,000
Maldon	2,400	1,000	Share of 56,000
Rochford	4,600	3,000	Share of 55,000
Tendring	8,500	6,100	Share of 20,000
Uttlesford	8,000	9,050	Share of 56,000
Essex Totals	**127,000 homes**	**146,010 jobs**	**131,000 jobs**

Source: East of England Plan (May 2008)

The key strategic planning objectives of the approved East of England Plan for Essex that shape its future spatial pattern of development are shown on Figure 3, and how these objectives translate in terms of economic and housing growth is shown on Figure 4.





Future Growth beyond 2021

3.3 Work has now commenced on the review of the East of England Plan to 2031. This is based upon a series of growth scenarios formulated prior to the current credit crisis and economic downturn. Even carrying forward existing agreed levels will be challenging to deliver unless the requisite infrastructure investment is forthcoming, and the debate on the possible options for incorporating these levels of growth has only just begun. The global economic downturn and specifically the UK recession will undoubtedly slow down housing and economic growth in the short-term and depending on its severity may well have significant implications that will have a knock-on effect to 2021 and possibly beyond.

3.4 A number of alternative scenarios are currently under consideration regarding future economic and housing growth beyond 2021. These range from a roll-forward of existing targets, to much higher potential growth options. Without the appropriate levels of investment this is considered to be unsustainable. Specifically, it is considered that it is perhaps premature to consider such long term provision when the implications of the current recession in terms of delivery in the short / medium term is still unclear. What is important is the development of a co-ordinated approach to

deal with the economic downturn, the problems this poses and the implications for future delivery. The key area of focus now is considered to be the need to secure the successful delivery of current infrastructure needs and identify the additional capacity that this will release for future development.

3.5 Section 6 considers how such additional growth requirements could be planned across Essex.

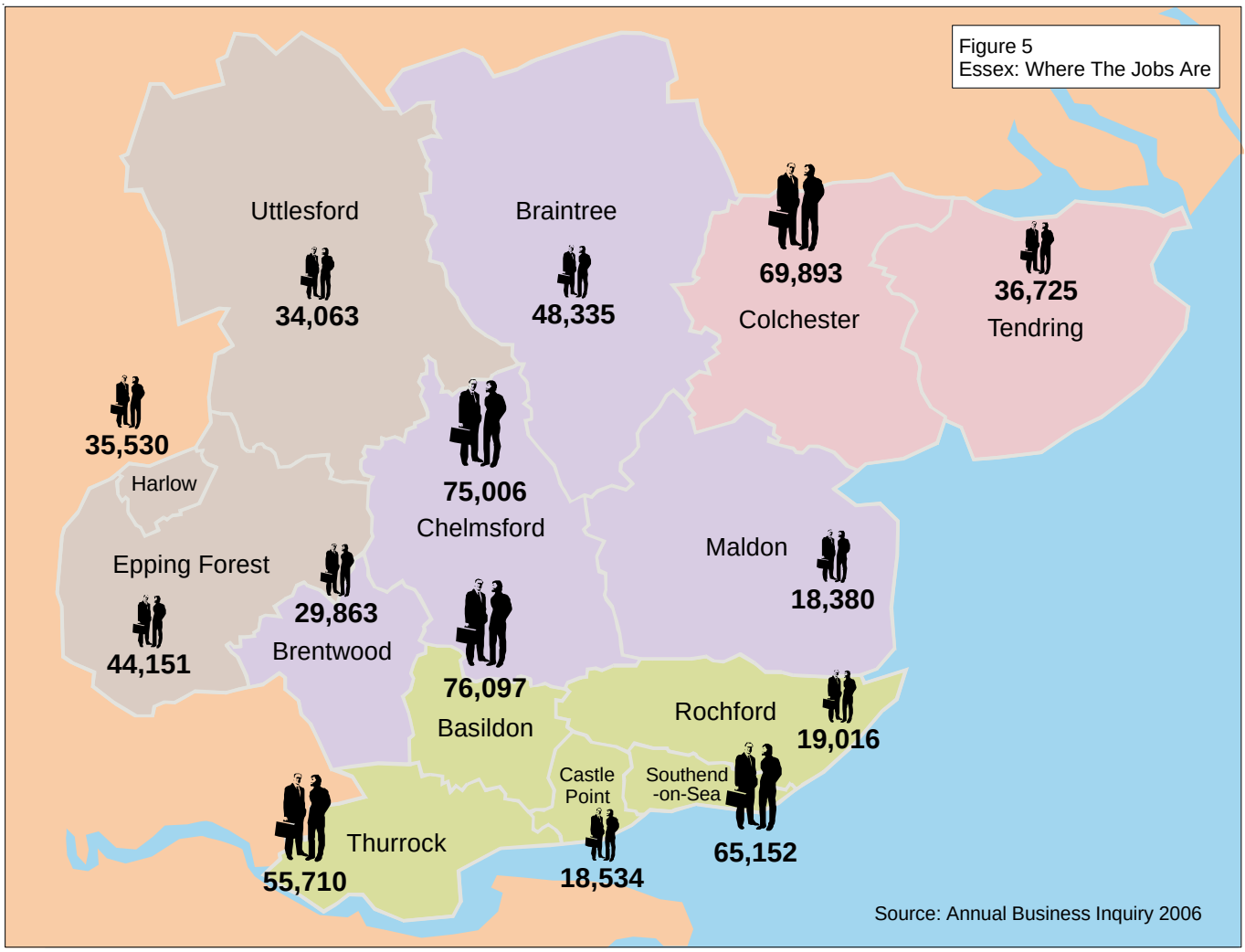
Economic drivers to 2021

3.6 The Essex economy makes a considerable contribution to the region's and nation's GDP. In 2005, the East of England economy was worth £90bn and Essex contributed £24bn to that total, equivalent to Hertfordshire and more than the combined value of Norfolk and Suffolk.

3.7 The County's primary economic strength is its position as an international gateway, particularly in the context of Stansted Airport and the Haven and Thames Gateway ports. The development of these ports will be a key future economic driver. London is also a key influence with over 110,000 people leaving Essex each day to work there and the future strength of the capital's economy (together with its shift eastwards) is key to the future of Essex. The opportunities of commuting for Essex residents should not be undervalued as it provides a major employment opportunity. Essex is however a major economic centre in its own right providing over 600,000 jobs across a wide variety of sectors. A significant majority of the Essex workforce is employed within the County boundary, many in the primary urban centres. The strengthening of the economy in these centres is as important as the success of the London economy in terms of delivering future economic growth.

3.8 The Regional Economic Strategy for the East of England places an emphasis on future economic growth in the region's seven "engines for growth". Three of these, the London Arc, Thames Gateway South Essex and Haven Gateway lie within Essex and the county therefore has a significant role to play in terms of its role in delivering the Regional Economic Strategy. The London Arc in particular has a close relationship with the success of the London economy and its existence as a concept promoted by EEDA is recognised within this document. However in a sub-regional context, the four sub-regions promoted within this document are considered to be of greater relevance.

The spatial distribution of jobs across Essex is shown on Figure 5.



3.9 Other key future economic drivers within the County include:

- The growth of the County's universities at Colchester, Chelmsford, Southend and Harlow
- The expansion and consolidation of major general hospitals at Southend, Basildon, Harlow, Chelmsford and Colchester
- Development of London Southend Airport as a regional airport and decisions on the future growth of Stansted Airport
- The 2012 Olympic Games
- The implementation of Crossrail
- The continued expansion of tourism and the promotion of the County's heritage and natural assets

- The potential for the further migration of back office functions from London and the movement of the City of London eastwards

3.10 Between the four sub-regions in Essex, internal commuting equates to over 250,000 internal trips within Essex. With the exception of London there is limited out-commuting from Essex to adjoining counties, for example 16,000 into Cambridgeshire, although this tends to be balanced by similar numbers of in-commuters to Essex.

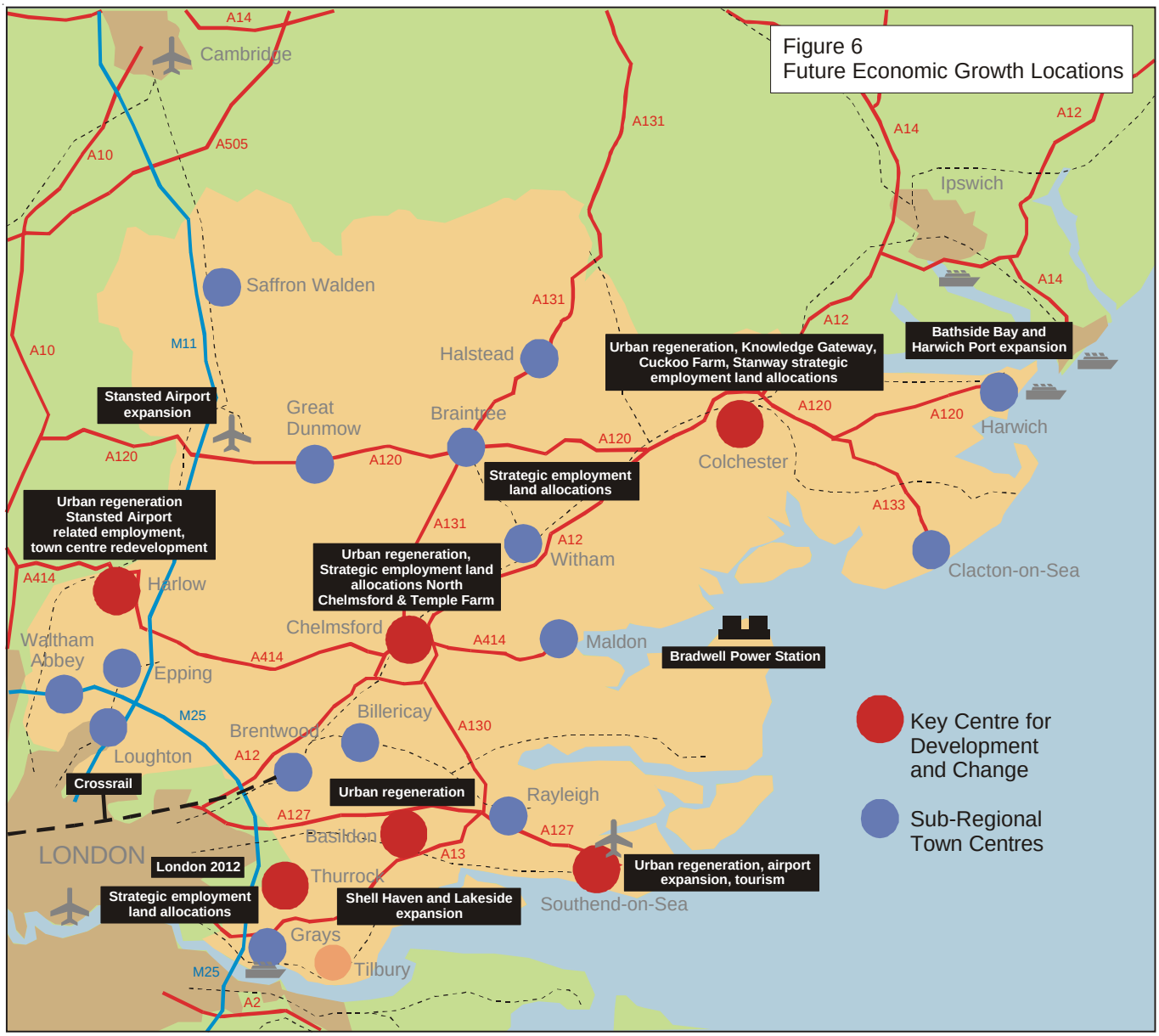
Internal Commuting		External Commuting	
Heart of Essex	126,500 trips	Essex to London	112,000 trips
M11 Corridor	70,000 trips	London to Essex	23,340 trips
Haven Gateway	101,000 trips	Essex to Hertfordshire	15,970 trips
Thames Gateway	86,600 trips	Hertfordshire to Essex	13,560 trips
		Essex to Cambridgeshire	3,190 trips
		Cambridgeshire to Essex	3,550 trips
		Essex to Suffolk	9,570 trips
		Suffolk to Essex	8,870 trips

3.11 In summary, the primary economic drivers that will affect the future growth of the Essex economy in the coming years are:

- The development of the Thames and Haven Gateways, particularly the Bathside Bay and Shellhaven developments
- The regeneration and development of Chelmsford, Basildon, Thurrock, Harlow, Colchester and Southend
- More modest growth beyond the Key Centres for Development and Change in the sub-regional centres
- The success (and possible change to) the London economy and the provision / restructuring of job markets and improved links with London, such as Crossrail
- The need to deliver adequate infrastructure to support economic growth aspirations in all locations
- Development of London Southend Airport and discussion on the future growth of Stansted Airport

The majority of forecasted economic growth will take place within the Key Centres for Development and Change which together could deliver over 100,000 jobs in the period to 2021. This will be supported by other sub-regional centres within Essex.

The location of the focus of future economic growth across the sub-regions is shown in Figure 6



Population growth

3.12 The population of Essex is projected to grow from its current level of 1.6 million to just over 2 million in 2031, a 22% increase. Represented at sub-regional level this equates to:

Projected Population Growth in Essex 2006 - 2031

Location	2006 Population	2031 Population Forecast	% Increase
Heart of Essex			
Braintree	139,700	180,800	29.4%
Chelmsford	162,800	198,500	21.9%
Brentwood	70,900	86,800	22.4%
Maldon	61,700	74,400	20.6%
Heart of Essex total	**435,100**	**540,500**	**(105,400) 24.2%**
Haven Gateway:			
Colchester	170,800	251,400	47.2%
Tendring	144,600	191,400	32.4%
Haven Gateway total	**315,400**	**442,800**	**(127,400) 40.4%**
M11 Corridor:			
Harlow *	78,100	82,600	5.8%
Epping Forest	122,900	143,100	16.4%
Uttlesford	71,400	85,800	20.2%
M11 Corridor total	**272,400**	**311,500**	**(39,100) 14.4%**
Thames Gateway South Essex:			
Rochford	81,100	95,100	17.2%
Southend	160,200	179,900	12.5%
Thurrock	148,900	183,200	23.0%
Basildon	168,600	194,600	15.4%
Castle Point	88,600	100,500	13.4%
Thames Gateway South Essex total	**647,100**	**753,300**	**(106,200) 16.4%**
ESSEX TOTAL	1,670,000	2,048,000	22.6%

* Much of the growth around Harlow will take place in adjoining districts beyond the boundaries of Harlow District, including urban extensions in Epping Forest and East Hertfordshire.

Source: ONS 2006-based sub-national population projections. This data is based upon ONS sub national population projections. Assumptions for future levels of births, deaths and migration are based on observed levels over the previous five years. They show what the population will be if recent trends in these continue and do not take account of any future policy changes that have not yet occurred.

3.13 Essex will clearly need to plan for this significant forecasted population increase and identify sustainable locations where this can be accommodated matched to infrastructure investment and economic growth aspirations. In percentage terms growth in the Haven Gateway and Heart of Essex is significant (40.4% and 24.2%), both higher than the other two sub-regions which have often been given greater priority in terms of delivering future growth. Given these projections the importance of Haven Gateway and Heart of Essex in delivering future growth should be fully recognised.

Existing settlement patterns

3.14 The settlement hierarchy of Essex can broadly be represented in the following way:

Key Centres for Development and Change		Sub- Regional Town Centres: ·		
Basildon	Harlow	Braintree	Halstead	Clacton
Chelmsford	Southend	Maldon	Billericay	Harwich
Colchester	Thurrock	Brentwood	Gt Dunmow	Witham
		Epping	Saffron Walden	Waltham Abbey
		Rayleigh	Grays	Loughton

3.15 It is dominated by the six KCDC's which are broadly of similar scale in terms of their economic and higher order functions. Within the catchment of these KCDC's are a significant number of smaller, free-standing towns which support a range of economic and functions with supporting residential populations. These are sub-regional centres within the sphere of influence of the KCDC's and help to define the extent of the four sub-regions identified in this paper. These sub-regional centres will continue to contribute to housing and economic growth in Essex, but generally at lower levels than the KCDC's. Some such as Braintree, will be expected to deliver more than some other sub-regional locations.

3.16 The focus of economic activity and housing growth in the past 40 years has traditionally been within Basildon, Chelmsford, Colchester, Harlow, Southend and Thurrock, which together make up 45% of the existing Essex population and importantly 60% of the total number of the County's jobs. Although the role of other settlements in Essex should not be under-estimated it is these six centres that form the focus for economic and housing delivery in the period to 2021. Whether they continue to perform this role beyond 2021 remains to be debated, but given their economic importance they will undoubtedly continue to be critical to delivering growth within Essex. Certainly, the focus of economic growth in the period to 2021will be directed towards these centres.

Infrastructure needs

3.17 It is well documented that the housing and economic growth that Essex has delivered in the past 30 years or so has not been matched by sufficient infrastructure investment, and in many ways the County is now playing "catch up". The County's infrastructure needs are significant and wide ranging, but the greatest need focuses on a range of significant transportation (road, rail and passenger transport) improvements, the delivery of which is critical to the longer term prosperity of the County and its ability to accommodate further growth.

3.18 Across the sub-regions of Essex the most significant infrastructure requirements can be identified as:

Sub Region	Nationally significant	Regionally significant	Locally significant
Haven Gateway Essex	• Bathside Bay • A12 improvements • A120 improvements	• North Colchester Rapid Transit link and A133 improvements • Knowledge Gateway • East Colchester Rapid Transit link • Colchester public realm/town centre improvements	• Colchester Park and Ride • Hythe Station improvements • Colchester UrbanTransport package • Regeneration/master planning package for Harwich, Walton, Clacton and Jaywick
Heart of Essex	• M25 improvements junctions 27-31 • A12 improvements • A120 Improvements	• North east Chelmsford Bypass • North East Chelmsford Rail Station • Chelmsford Area Rapid Transit • Army & Navy junction improvements	• Braintree branch line • Chelmsford Park and Ride • Chelmsford/Maldon flood alleviation • Local Maldon/Braintree highway improvements • Chelmsford new secondary school
M11 Corridor	• M11 junction 7 improvements and improvements to Stansted Airport access • A120 improvements	• A414 bypass and new M11 junction • Addressing the transport connection between Harlow and the growth to the north • A414-M11 junction 7 dual carriage upgrade • Railway upgrades - increasing capacity of the West Anglia mainline including 4-tracking	• Harlow town centre transport improvements • Harlow sewage treatment works upgrading • Burnt Mill roundabout improvements • Southern Way improvements • Internal public transport network improvements • Improvements to the cycle track network • Improvements to Harlow Railway Station • Increasing capacity of electricity supply to Harlow • Towpath upgrade between Harlow town park to Harlow Lock • Towpath upgrade north of Harlow to Bishop's Stortford
Thames Gateway South Essex	• M25 widening junctions 26-31 • Shellhaven	• South Essex Rapid Transport • A13/A130 Sadlers Farm Intersection • A127 and A1159 improvements • Gardiners Lane south access improvements • C2C line capacity • A13 Passenger Transport Corridor • Transport improvements to London Southend Airport	• Roscommon Way regeneration (Castle Point) • Fryerns/Craylands regeneration access (Basildon) • Rayleigh Weir junction improvements • Southend town centre and seafront integrated transport scheme • Access to East Rochford and Southend

Figures 7 and 8 represent diagrammatically some of the most significant infrastructure investments identified across Essex at the national, regional and local levels.

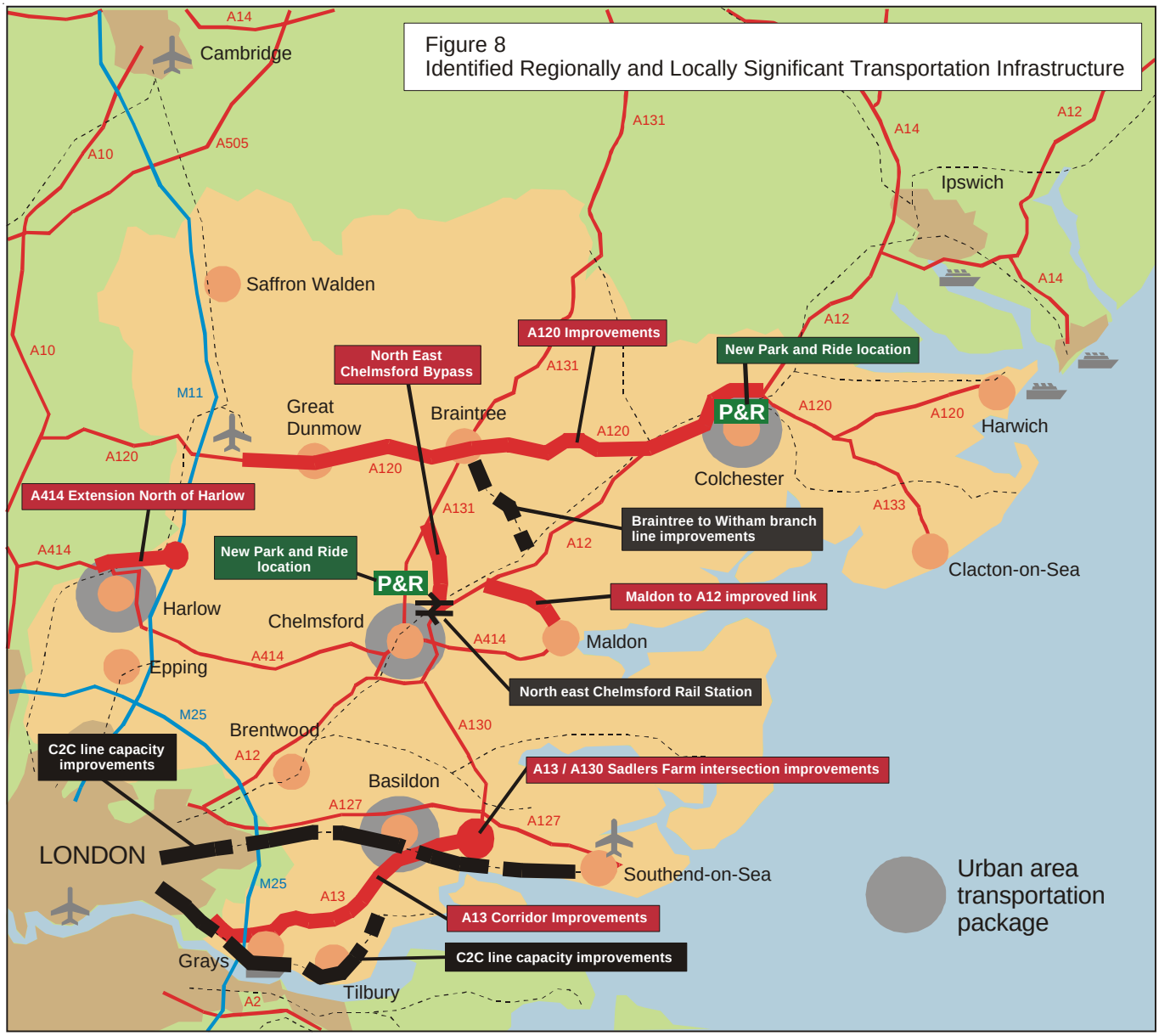


Figure 8
Identified Regionally and Locally Significant Transportation Infrastructure
Cambridge
Ipswich
Saffron Walden
Great Dunmow
Braintree
Colchester
Harwich
Clacton-on-Sea
Harlow
Chelmsford
Maldon
Epping
Brentwood
Basildon
LONDON
Southend-on-Sea
Grays
Tilbury
A14
A10
A505
A131
A12
A120
A414
A133
A130
A127
A13
A2
M11
M25
A120 Improvements
North East Chelmsford Bypass
New Park and Ride location
P&R
A414 Extension North of Harlow
Braintree to Witham branch line improvements
Maldon to A12 improved link
North east Chelmsford Rail Station
C2C line capacity improvements
A13 / A130 Sadlers Farm intersection improvements
A13 Corridor Improvements
Urban area transportation package

3.19 Work is ongoing to identify the total cost of delivering requisite infrastructure and indeed what mechanisms will be used to fund delivery (Growth Fund, Community Infrastructure Fund, Planning Contributions/S106 packages, DfT funding, RFA, emerging Community Infrastructure Levy etc). Different sub-regions and districts within them are at varying stages of identifying their infrastructure needs and the investment needed to deliver this. A recent piece of research carried out on behalf of the Greater Essex Prosperity Forum – Investing in Infrastructure in Essex 2008, puts the cost of infrastructure delivery across the County at £7.6 billion and identifies a funding gap of some £6.5 billion, although this work does not encompass all identified infrastructure. The research also identifies a number of "quick win" investments, put at £37 million, that would enable some of the necessary building blocks to accommodate growth to be put inplace. These "quick wins" include: urban area transport packages in Basildon, Colchester, Southend, Harlow and Chelmsford together with A12 capacity improvements (M25 to Chelmsford and Chelmsford to Ardleigh).

3.20 What is apparent is that there is a significant infrastructure deficit in Essex (traditionally Essex has taken 25% of growth, but only 11% of infrastructure funding), which in the current economic climate is only likely to widen. More so than ever, it is critical that Essex identifies its infrastructure priorities and matches future growth to those priorities in the context of delivering housing and economic growth to 2021 and beyond, with an emphasis on positive engagement between the districts / unitaries and Essex County Council to ensure funding is delivered to the right projects and at the right time. Critically, nationally significant infrastructure projects should be funded from the national purse, rather than the regional purse, freeing up additional resources to meet critical regional requirements.

Key Issues

Housing delivery

3.21 At the levels of growth planned in the period to 2021 housing delivery within Essex will need to achieve completions at a rate of 6,350 per annum. Evidence shows that in the period 2001 - beginning 2008 the majority of districts have been reaching their individual housing targets and even in the last year delivery has been close to the sub-regional housing trajectories. However, given that the global economic down turn has started to take effect in the second half of 2008 it will be completions in 2008 that are likely to reveal a significant slow down. During 2008, there was a fall in average house prices in Essex of over 10%. This fall in prices, together with a significant shortfall in the availability of mortgage and construction finance, has led to the housing market in Essex slowing progressively during the year and suffering significant reductions. This in line with national and regional trends, and there is unlikely to be a significant recovery locally until national economic conditions improve. Other forecasts are indicating a 20% fall in house building in the period 2009 - 2011.

3.22 The delivery of affordable housing is a priority across the whole County. The challenge is significant in many parts of Essex. For example, in Tendring the demand is for 1,579 dwellings per annum against an annual completion rate of 400 units, with 3,900 registered households on the waiting list. All districts are setting affordable housing delivery targets at approximately 30 - 40%.

The Essex LAA sets the following targets for affordable housing delivery in the period 2008 - 2011. These were set before the current economic downturn and therefore the challenge of delivery is now even more significant.

District	Baseline (2002-6)	2008/09	2009/10	2010/2011
Basildon	110	300	300	300
Braintree	84	100	100	100
Brentwood	12	74	65	41
Castle Point	7	15	54	50
Chelmsford	149	160	160	160
Colchester	99	119	128	136
Epping Forest	53	45	45	45
Harlow	40	87	118	263
Maldon	6	31	32	32
Rochford	25	50	64	50
Southend	30	100	140	160
Tendring	21	15	20	25
Uttlesford	73	100	120	130
Essex	709	1196	1346	1492

3.23 The economic downturn will have an impact on all housing delivery, including affordable housing, but it may be that there is a shift in the next 2 - 3 years to a focus on delivering affordable housing. In particular, the advent of the new Homes and Communities Agency (HCA) will be central to this. The HCA will be responsible for over £17.3 billion (2009-11) including the National Affordable Housing Programme and the Growth Fund. It will be critical for Essex to engage effectively with the HCA, at various levels, through the "single-conversation" process. Things are changing fast - most RSL's do not have the funds to support development and the role of the HCA in enabling delivery is now of greater importance. The "single conservation" will be had across different geographical areas in Essex and with different authorities - sometimes sub-regionally and sometimes at local authority level.

Education

3.24 Essex has major strengths in educational provision which will need to be built upon in the period to 2021. Essex University, Anglia Ruskin University and the FE colleges have a key role to play in this. Although educational attainment, in some districts, is above national and regional averages there are some locations where basic numeracy and literary skills need to be developed to bring the local workforce up to particular NVQ levels as identified within the Essex LAA. This is vital in order to create the right conditions in the future to attract new employers / investment in the County. This is a key priority for the County of Essex if it is to reach its full economic potential.

Workforce Development and Skills

3.25 Essex has a diverse and prosperous economy that has undergone significant restructuring in the last 30 - 40 years. There is still a strong manufacturing sector in Essex although overall its economy is now focussed on the service sector. As with basic numerary and literacy skills. The County also faces issues of skill shortages in certain sectors and the need to maximise its potential via workforce development. This again is a key issue for Essex to face up to 2021 and beyond and will place increased emphasis on the role of the education authority, Government-sponsored training providers, Business Link and higher educational establishments.

Climate Change

3.26 The impacts of climate change are already evident in Essex, with an increased risk from flooding in many places across the County and increased water demand in one of the counrty's driest areas. The need for increased coastal protection measures and flood alleviation schemes places a major constraint on the ability to deliver sustainable patterns of growth in the short term, particularly in some town centres, without the necessary investment in such flood mitigation works. It is a key objective of the Essex authorities to secure this investment from Government, the regional bodies and the Environment Agency.

Environmental Protection

3.27 It is clear that whilst the Essex sub-regions are prepared to embrace the growth agenda, this is not at any cost. The protection of the County's rich historic, landscape and environmental character is apparent in most, if not all of, the individual and collective visions. Environmental enhancement and preservation of parts of Essex is essential, as well as, the delivery of housing and economic growth. The creation of a sense of place with strong links to its historic and natural environment are vital to shaping a future Essex which is both attractive and sustainable.

4 Key issues for Essex to 2031

4.1 The key economic and housing issues that need to be addressed within Essex in the period to 2031 are:

Infrastructure delivery and matching growth to infrastructure provision

4.2 This is addressed more fully in Section 3 and is certainly the most critical issue faced within Essex in terms of delivering future growth. Without much greater investment across the sub-regions it will be extremely difficult to accommodate the levels of growth required in a sustainable way.

Key Issue 1:
The identification of infrastructure investment priorities at the County and sub-regional level together with an analysis of the housing and economic growth capacity these investments will release.

Understanding the impact of the economic conditions on housing delivery

4.3 Since this piece of work commenced the full impact of the credit crisis and economic downturn has unfolded. The likely impact is the need for the housing trajectories across Essex to be revisited. The Review of the East of England Plan has begun in advance of this assessment being fully understood. The likely impact will be a significant slowing down of housing delivery to 2021, and maybe beyond which will need to be factored into the Review of the East of England Plan.

Key Issue 2:
In the light of the current economic circumstances for Essex to fully assess the impact on housing delivery numbers. As a result to consider how the economic downturn will impact on housing delivery in the period to 2021 (and beyond) in the context of the Review of the East of England Plan, which has begun in isolation of a full understanding of what is happening or likely to happen on the ground.

Delivering new homes and in particular affordable housing

4.4 Across all of the Essex sub-regions there is a significant need for the delivery of affordable housing to meet local housing needs. As the population of the County grows to 2031 this is likely to become more acute. All sub-regions are developing through their Local Development Frameworks ambitious affordable housing delivery policies. In the short term, given the economic downturn, this will be difficult to achieve and the advent of the new Homes and Communities Agency (who will also be responsible for the Growth Fund) offers a new opportunity for the County to secure additional investment in affordable housing delivery. As with infrastructure, and given the level of growth being directed to Essex, it will be necessary for the County's local authorities to work together to secure additional investment to deliver affordable housing.

Key Issue 3:
For Essex, through the "single conversation" process with the Homes and Communities Agency, to be clear about its sub-regional growth ambitions and needs in order to deliver consistent messages to them and secure additional investment in order to deliver good quality affordable housing.

Improving the balance of homes and jobs

4.5 One of the key premises of sustainable development is ensuring a balance between homes and jobs. Strategies that deliver an imbalance of homes to jobs will inevitably lead to a move towards out commuting and an increased reliance on the car. Although there is a significant amount of self-contained travel to work within Essex there are strong patterns of out commuting. Achieving an appropriate balance between new homes and jobs is key to the future prosperity of Essex.

Key Issue 4:
For Essex through its approach to future spatial and economic planning to ensure that an appropriate balance between new homes and jobs is delivered to secure long term sustainable economic growth. As part of this to work collectively to encourage inward investment into Essex.

Tackling skills

4.6 Section 3 of this paper briefly addresses the skills issues across Essex and undoubtedly this is a key issue that needs to be addressed in the coming years through Local Strategic Partnerships, Community Strategies and Local Area Agreements.

Key Issue 5:
For Essex to continue to identify areas requiring skills development through the Local Strategic Partnerhips and Sustainable Community Strategies and focus delivery in the areas of greatest need.

Co-ordinating Delivery

4.7 The study has revealed a variety of different mechanisms for delivering economic and housing growth within Essex. If Essex is to be effective in delivering the ambitious targets that it has been set then a co-ordinated approach to delivery mechanisms and the capacity to support then will need to be taken forward.

Key Issue 6:
For Essex to move towards a more co-ordinated approach to delivering economic and housing growth and address the necessary capacity to take this forward through the four sub-regions identified in this paper.

5 The Sub-Regional context

5.1 Within the four Sub-Regions a number of objectives have been identified. Fuller information provided by the sub-regions is set out in the Appendices to this paper. However, below is a summary:

Heart of Essex

5.2 Within the Heart of Essex growth will be directed to Chelmsford as the Key Centre for Development and Change in the sub-region, with relatively significant growth also within Braintree district. More modest growth is planned at Brentwood and Maldon. Housing and economic growth is being directed to within existing urban centres, where there are significant infrastructure requirements and also to greenfield locations to the north of Chelmsford, north- west of Braintree and north-east/south-west of Witham. In terms of these greenfield allocations, growth is being directed to areas where significant infrastructure investment is planned, notably in Chelmsford the North-East Chelmsford bypass, Park and Ride and a new rail station. The key objectives for the Heart of Essex sub-region have been identified as:

- Securing sustainable patterns of development
- Focusing growth in the existing urban centres and extensions to them
- Securing the necessary transportation improvements, including public transport
- Meeting the housing needs of the whole community
- Safeguarding environmental assets
- Supporting and maintaining a vibrant local economy

Thames Gateway South Essex

5.3 Thames Gateway South Essex is part of one of the biggest regeneration projects within Europe. The focus of growth will be within the Thurrock Thames Gateway area, together with the regeneration of Southend and Basildon. The delivery of Shellhaven and its potential economic growth potential is a key element of the sub-region's growth strategy as is the expansion of London Southend Airport. More modest growth is planned within Rochford and Castle Point. The area also faces significant skills issues that are high on the agenda for the sub-region.

The key objectives for the Thames Gateway South Essex area have been identified as:

- Maximise Thames Gateway's number of key employment and residential sites to present an opportunity to create exemplar mixed communities.
- Ensure transport and social infrastructure is planned and focused to open up new development sites to deliver housing growth.
- Maximise the housing development potential of the Thames river front, whilst enhancing its recreational use and protecting its bio-diversity.
- Encourage inward migration of skilled workers and enhance the skills of the wider workforce, ensuring that housing growth meets their diverse needs.

- Ensure Thames Gateway's planned population growth benefits all residents not just newcomers by for example developing the local skills base to maximise take up of new jobs.
- Ensure programmes are in place to improve community safety and guarantee good housing management for the Gateway's housing stock both public and private.
- Ensure that addressing health inequalities is mainstreamed in the planning of infrastructure and through a design code for future developments.

Haven Gateway Essex

5.4 Within Haven Gateway Essex the majority of housing growth will take place in Colchester, as the Key Centre for Development and Change in the sub-region. Tendring will deliver more modest growth. Economic growth will be focused through the regeneration proposals for Colchester, the planned Knowledge Gateway, Cuckoo Farm and Stanway strategic employment sites. The Bathside Bay development at Harwich is a key element of the Gateway's employment strategy. Infrastructure priorities reflect the planned pattern of growth and are focused around a series of measures primarily in Colchester, including A12 junction improvements, urban transportation packages, park and ride and rail station improvements. Across the wider Haven Gateway the Integrated Development Programme identifies 10 investment packages, four of which relate to the spatial growth of Colchester and regeneration of the coastal towns in the Gateway. In many ways the growth scenario for Colchester is very similar to that of Chelmsford.

The key objectives for Haven Gateway Essex have been identified as:

- 17,100 homes in Colchester, 8,500 in Tendring
- 20,000 jobs in Colchester and Tendring (combined)
- New container terminal facilities at Harwich and Felixstowe
- International visual arts centre – First site, Colchester
- Maintenance of the Gateway's high environmental values and quality of life through a green infrastructure strategy
- Regeneration of Jaywick, Harwich and other coastal towns
- Maximising the role of the sub-region as an International Gateway to the UK
- Projects to enhance the sub-region's role as an area of creativity and innovation

M11 Corridor

5.5 Within the M11 Corridor the focus of future growth will be around Harlow (and into Hertfordshire) which is identified as a Key Centre for Development and Change. This in itself poses major challenges for the sub-region as does the debate around a second runway at Stansted. The regeneration of Harlow town centre is a key priority within this part of the M11 corridor and major transportation infrastructure focuses on improvements to the M11 and A414.

The key priorities for the London-Harlow-Stansted corridor are to:

- Ensure that the delivery of new homes, infrastructure and economic growth play a major role in the regeneration of Harlow and the Lee Valley

- Ensure that development in the area meets the highest possible quality, sustainability and design standards, is supported by the necessary services and infrastructure, and is well integrated with existing communities
- Protect and enhance the rural character of the majority of the area and the character of smaller and historic towns
- Recognise the important role that historic buildings, conservation areas and other features can play in creating communities with a sense of place
- Make the most of existing, and create new, green infrastructure as a resource for local communities, and in particular promote cycling and walking for recreation and transport
- Use growth at Harlow, and its proximity to London, Stansted Airport, and Cambridge, to promote its role as a substantive sub-region centre and as a catalyst for a fundamental change in its image
- Establish Harlow as a key location for airport-related employment and housing, and as a university town
- Tackle the significant transport issues facing the area, particularly congestion at Harlow, by appropriate management of existing and provision of new infrastructure and by a major increase in the provision of facilities for and use of public transport, walking and cycling
- Ensure the redevelopment of Harlow town centre, achieving Harlow's position as a sub-regional centre

The above key priorities are those that are identified within the London, Stansted and Harlow Programme of Development. Within Harlow, as the KCDC and a Priority Area for Regeneration, the following priorities have been identified:

- Sustaining the improvement in education attained and achievement
- Strengthening inward investment activity
- Exploiting our economic sector strengths to attract high skilled jobs and industries
- Continuing to develop entrepreneurship and small business start up growth
- Achieving uplift in Harlow areas of deprivation
- Achieving investment in Harlow's road infrastructure connections to the strategic road network

6 Future potential growth scenarios for Essex

6.1 Essex continues to face major planning challenges, in how planned housing and employment growth can be accommodated, initially up to 2021 and then beyond to 2031. These challenges focus on how sustainable patterns of development can be achieved, without compromising the key environmental and historical assets which have shaped Essex's towns and countryside in the past and which will continue to do so in the future.

6.2 Essex has had to accommodate higher than average levels of growth, when compared to other counties in the East of England, and this trend is expected to continue through to 2031. This is due to many factors, not least of which is the county's position as a gateway to London, other parts of the East of England and to Europe and beyond through the parts of Harwich and Tilbury and the county's airports.

6.3 The Essex authorities are making good progress with their Local Development Framework Core Strategy DPD's and three (Chelmsford, Colchester and Southend) have been adopted to date, after formal Examination. The completion of the remaining districts' Core Strategy documents will be crucial in establishing, and then implementing, a County-wide Spatial Strategy. That Spatial Strategy, which reflects the policies of the East of England Plan focuses major growth on the six Key Centres for Development and Change (KCDC), through extensive urban regeneration projects, other development of 'brownfield' sites across most of Essex's settlements and sustainable 'greenfield' urban extensions where necessary. These developments are being linked to the provision of new community and transportation infrastructure, in order to improve infrastructure capacity to support the scale of growth anticipated.

6.4 In addressing growth requirements between 2021 and 2031, the initial challenge facing Essex authorities is to identify the environmental and infrastructure capacity of the County to support growth. From the work undertaken so far on districts' Local Development Frameworks, a substantial Evidence Base is being built up identifying the opportunities and constraints for growth. This work will need to be refreshed and updated for the period beyond 2021, but the very strong likelihood is that the existing strategy of concentrating growth on the County's six KCDC's should be maintained in the future, since it is those towns which constitute the economic, retail, cultural and transport hubs of the county and where the highest levels of existing, and planned future, capital investment is concentrated. In contrast, the level of investment to support a planned new major settlement within Essex is unlikely to be achievable, and recent evidence of planning new settlements shows that infrastructure delivery, particularly community infrastructure, can lag behind new housing.

6.5 A future evolving strategy which focuses growth on the KCDC's will, in the case of Basildon, Harlow, Chelmsford and Southend, require a review of Green Belt boundaries to ensure that economic and residential growth can be accommodated in the most sustainable way. Such reviews will need to be an early part of the work to be undertaken in updating the Evidence Base and may need to be carried out in association with neighbouring districts / boroughs.

6.6 A continuing strategy of concentrating growth at the KCDC's will not of itself meet the expected Regional growth requirements for Essex. For those districts beyond the KCDC's the likely strategy should be to focus growth on the existing larger settlements, which again, in the case of towns such as Brentwood and Rochford, will require local reviews of Green Belt boundaries. These medium sized towns within Essex already support significant levels of community and transportation infrastructure, often being the centre for civic and public functions, and it is the most logical strategy to continue to support and, where possible, enhance such investment. An outcome of directing some growth to the County's sub-regional settlements will probably be the need to reinforce and improve the transportation links between such centres and the KCDC's, which will continue to be the primary retail, employment and cultural centres within Essex. This points to the need for the early preparation of an integrated high level planning and transportation strategy for Essex as a whole, which identifies the key corridors and transport nodes for future investment linked to economic and housing growth.

6.7 The Essex districts do not support the approach of developing new settlements as a means of accommodating growth, critically because this approach requires substantial investment in community and transportation infrastructure to achieve relatively modest levels of growth. The authorities' preferred long-term strategy is based on concentrating growth on the six KCDC's supported by more limited growth in the sub-regional centres, with targetted infrastructure improvements to support that growth.

6.8 The Review of the East of England Plan (RSS14) for the period 2021 to 2031 has been commenced by the East of England Regional Assembly (EERA), and the timetable for this work envisages a Draft Review document being submitted to the Government by the end of 2009. That work is presently being informed by household growth projections published by the National Housing and Planning Advisory Unit (NHPAU) in March 2008, and by a variety of studies commissioned by EERA, and by County Council's across the region.

6.9 The minimum growth targets suggested for Essex in the period 2021 - 2031 are likely to be a carry forward of current East of England Plan targets and could be signifcantly higher. Unless the issues identified in this paper are addressed effectively, delivery of housing and economic growth to 2021 will in itself represent a major challenge rendering projections beyond 2021 as potentially unachievable and unsustainable.

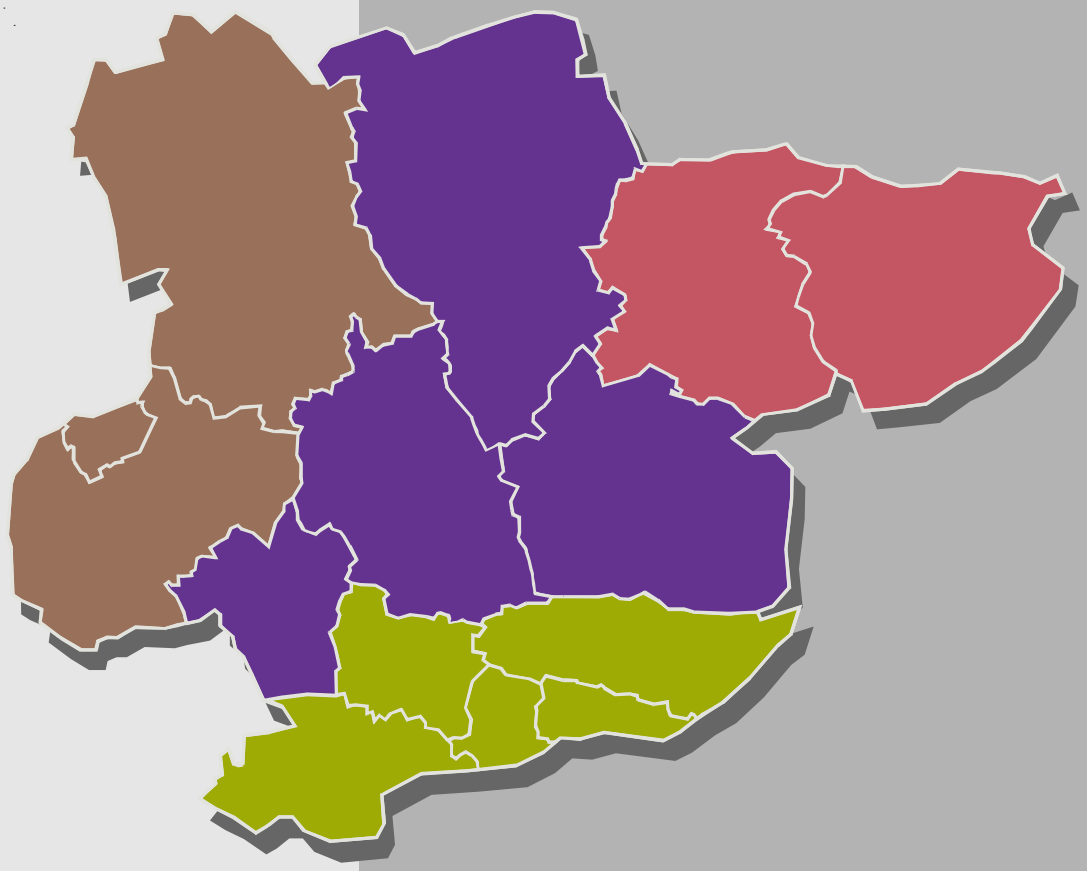
6.10 It is suggested therefore that, in considering the future growth scenarios for Essex, further studies be undertaken at both sub-regional and county-wide level on the following themes, and using the existing rates of growth (i.e. up to 2021) contained in RSS14 as the baseline target to be addressed for the period 2021-2031:-

- a county-wide planning and transportation strategy to identify key transport infrastructure investment requirements necessary to support growth;
- a study of the environmental and infrastructure constraints affecting the capacity of the KCDC's and other major Essex settlements to accommodate further growth, including for example flood risk, water supply / treatment community infrastructure constraints and key landscape/conservation issues;

- the economic growth and regeneration priorities for each of the four sub-regions and the county;
- the identification of those areas where a review of Green Belt boundaries will be necessary, and the criteria for such reviews
- the identification of the potential for the development of joint / co-ordinated Local Development Frameworks and related to this a recognision of urban capacity and constraints

Strategic Countywide Economic & Housing Issues

Appendices
Sub-Regional Position Papers

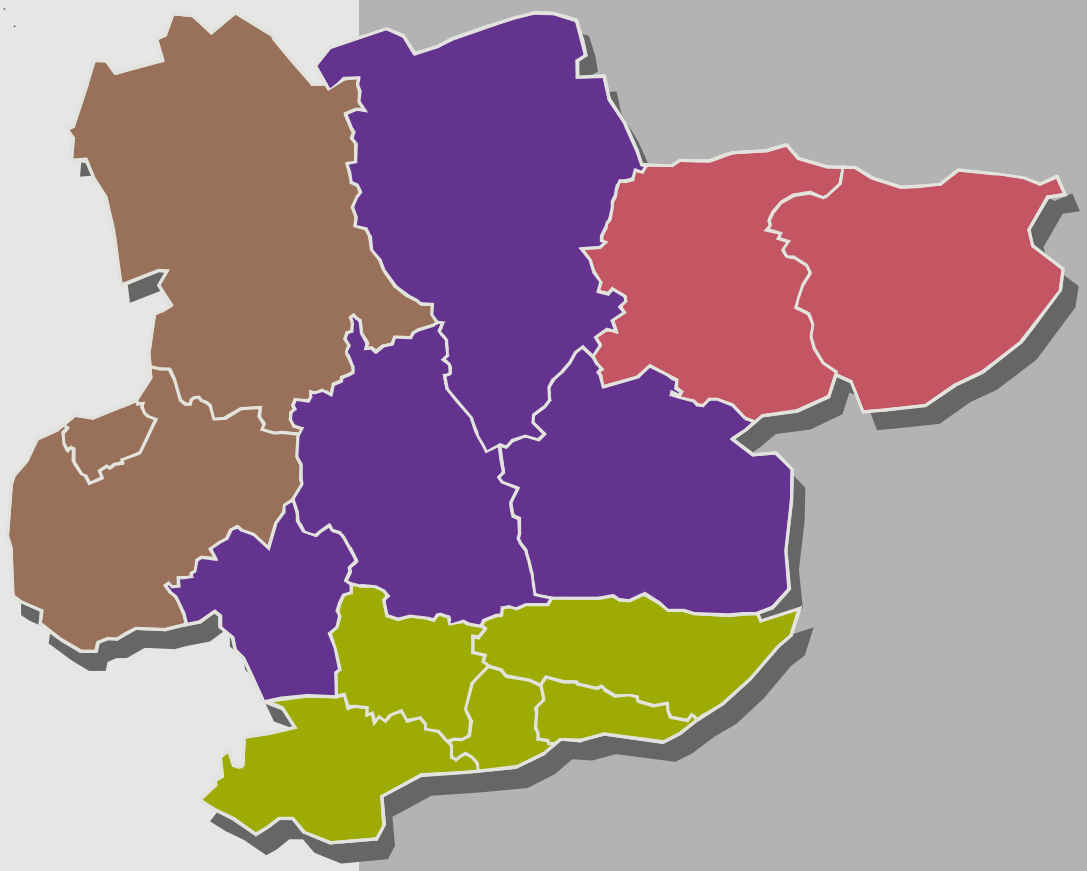


November 2008

(Updated July 2009)

Strategic Countywide Economic & Housing Issues

Haven Gateway (Essex) Position Paper



November 2008

(Updated July 2009)

Contents

1 Introduction and Context

1.1 This paper has been prepared for the Essex Chief Executives' Association sub-group who are considering Economic and Housing issues across the four sub regions of Essex.

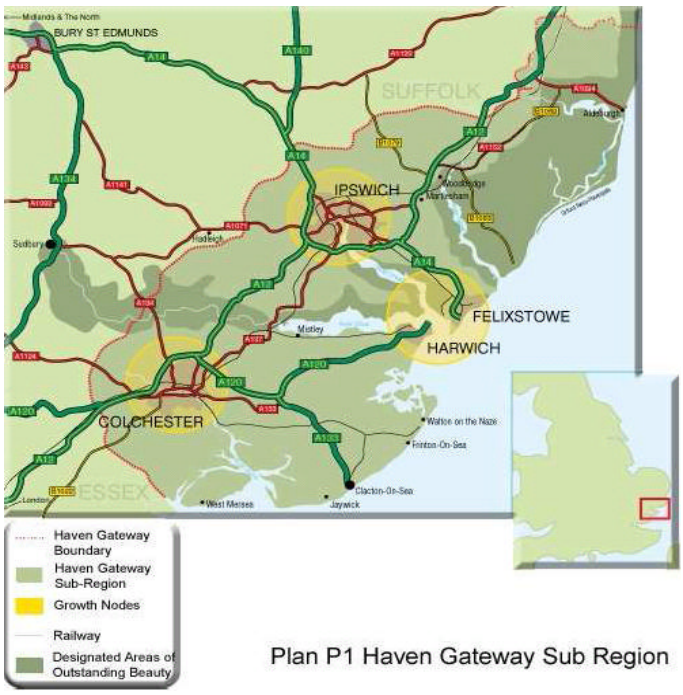
1.2 Specifically the paper sets out the Haven Gateway Partnership's vision for growth for the two Essex local authorities involved in the Partnership – Colchester and Tendring (making reference where appropriate to the other Suffolk local authority partners – Ipswich, Suffolk Coastal, Mid Suffolk and Babergh.)

1.3 It also identifies the range of infrastructure as outlined in the Haven Gateway's Integrated Development Programme to deliver this growth and possible constraints to its delivery.

2 A vision for the Haven Gateway

2.1 Tendring and Colchester both have local strategic visions for their districts which are delivered through their strategic plans and sustainable community strategies. These visions are summarised in Appendix A to this paper and share some key priority areas around jobs, skills, transport, young people, housing and sustainability.

2.2 The Haven Gateway is identified in the East of England Plan as one of four areas in the region for which the "*coherence and particular nature of the issues and responses justifies sub-area treatment*". As well as the regional cities of Ipswich and Colchester, the sub-region is defined in relation to the internationally-significant Haven Ports (principally Felixstowe, Harwich and Ipswich), its market and coastal towns, and its high quality rural hinterland. The East of England Plan explains that the Haven Gateway *"includes the key areas for change in Ipswich and Colchester and has the potential to develop further as a major focus for economic development and growth*".



Plan P1 Haven Gateway Sub Region

2.3 Haven Gateway partnership's shared vision is;

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

2.4 Between 2001 and 2021, provision will be made for the delivery of 65,100 net additional homes within the Haven Gateway (of which 49,680 will be delivered between 2006 and 2021, and 35% as a guideline will be affordable). Additionally, the sub-region has committed to delivering some 50,000 net additional jobs. It is because of its willingness to sign up to growth on this scale that the Haven Gateway is identified within the new Regional Economic Strategy as one of the East of England's principal *"Engines of Growth"*. By the end of the period, it is anticipated that the resident population of the Haven Gateway sub-region (all districts) will have grown from 700,000 to 800,000 people.

2.5 The following outlines the thirteen key challenges and opportunities that have been identified and evidenced in relation to the Haven Gateway's growth ambitions;

a) GVA growth across the whole of the Haven Gateway is projected to be lower than the regional average and there is a concern that – left to its own devices economic growth will focus on low wage/low skill activities
b) Skills levels across the Haven Gateway are relatively poor and in some areas, they are seriously weak
c) Currently, the area performs poorly on metrics of enterprise/entrepreneurship. In this context, there may still be a shortfall in relation to the supply premises for business start-ups
d) Particularly in and around Colchester, employment land – although plentiful in supply – is of a poor quality and it is not conducive to added value economic growth
e) Within the Haven Gateway, there are some strong knowledge-based assets which need to be harnessed effectively, especially in the creative industries, in ICT, and in environmental technologies
f) The urban functions (retail, services, etc.) of the larger urban areas are relatively weak and – at least in Ipswich and Clacton-on-Sea – this links to the built form/urban realm. Issues relating to the economic vibrancy of town centres need to be addressed
g) Several coastal towns are in need of regeneration: there are pockets of severe deprivation in these communities, including in relation to labour market participation
h) Although the development process is a long one, the prospect of significant port expansion at Felixstowe and Harwich needs to be recognised, and potential economic opportunities need to be identified in response
i) The sub-region's housing growth target remains a challenging one: although delivery was better in 2007, the whole sub-region is now facing the impact of the credit crunch
j) The provision of new affordable housing in the Haven Gateway since 2001 has been less than a third of that sought by the RSS for the period 2008-2021 so the delivery challenge is acute, particularly if the backlog of provision is to be addressed

k) The provision of new physical infrastructure is currently failing to keep pace with the growth in housing and population. This is probably most acute in the case of transport investment, both at a subregional level (A14, A120, F2N) and at the local, inter-urban, level

l) Water resources will become increasingly stretched and, at the same time, the risk of coastal flooding will threaten parts of the area, including some of our towns

m) The need to safeguard and create green lungs and corridors (both within towns and between them) will also become more important as the area continues to grow

3 Components of Future Growth Growth Targets

Growth to date
Population Growth

Location	2001	2006	Growth Rate
Colchester	156,000	170,800	1.8%
Tendring	138,800	144,600	0.8%

Housing Growth

Colchester

3.1 Through the Local Development Framework, Colchester needs to ensure that housing provision delivers 19,000 homes between 2001 and 2023 this equates to an average annual build of 830 units per annum. Although currently 1,318 units ahead of schedule the current market will provide challenges for this target. Between 2001 and 2007 Colchester achieved 650 affordable housing completions which is an average of 11% of overall completions compared to a local target of 25% (to be 35% Dec 08) and EEP target of 35%. Colchester's RSS14 housing growth target (2001 – 2021) is 17,100

LAA 2 targets

	Net add. Housing	Affordable Housing
2008 / 9	955	119
2009 / 10	855	128
2010 / 11	1000	136

Tendring

3.2 Total housing requirement is 8,500 houses between 2001 and 2021 (3147 built so far)
Local Plan Policy seeks 40% affordable housing on sites with capacity for 15 dwellings or more in urban areas and 5 dwellings or more in rural areas.

3.3 Both Districts are at different stages in preparing their Local Development Frameworks so any analysis is based on the latest available information.

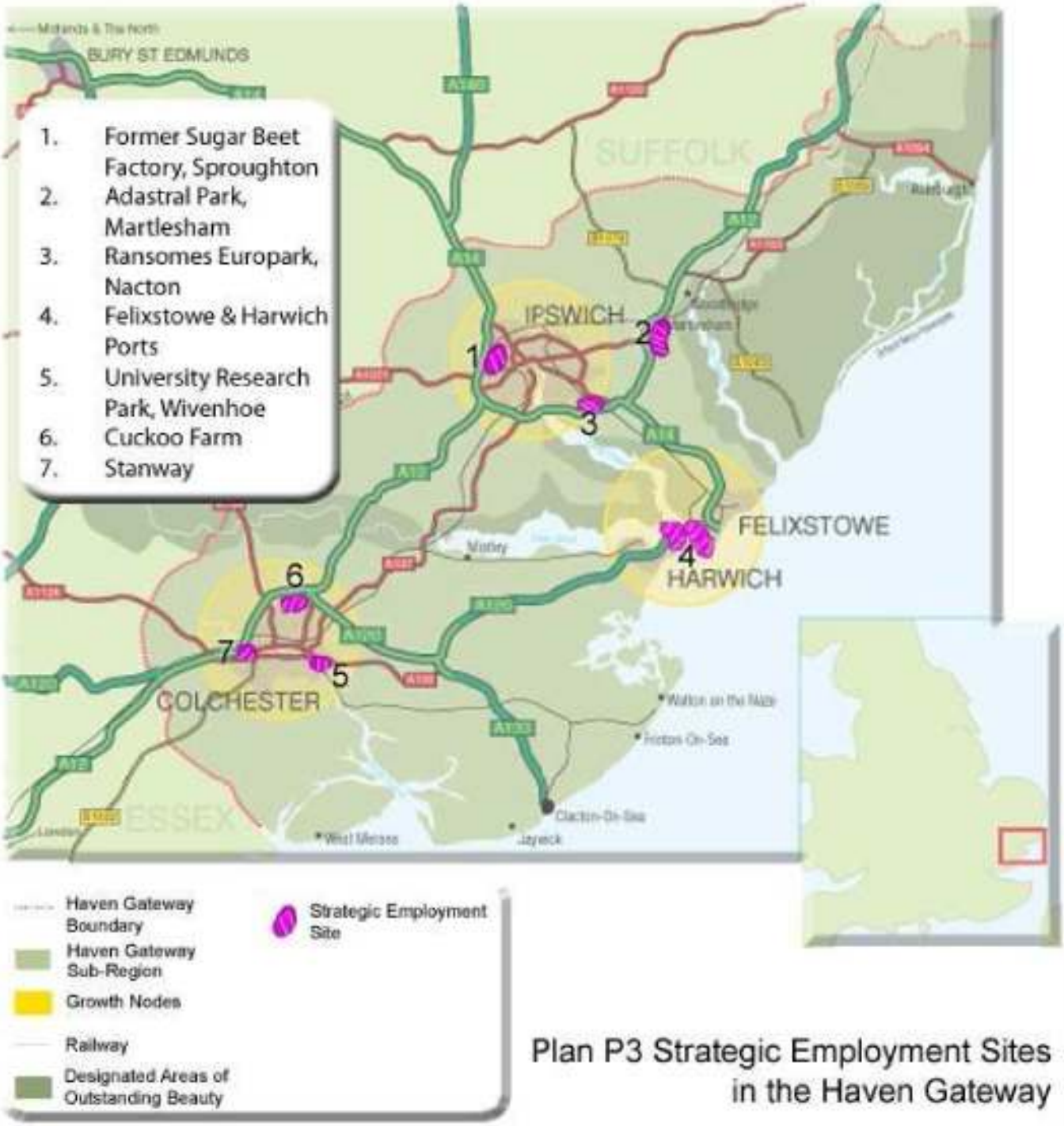
Economic growth

3.4 Colchester has a diverse and growing business community (5,000 VAT reg. businesses, around 15,000 non VAT reg., annual increase of VAT reg 500 per annum). The local economy is predominantly made up of small to medium size businesses and is underpinned by a strong public sector with major employers including the Garrison and University of Essex.

3.5 The RSS employment forecast to 2021 has been adopted as the strategic jobs target for Colchester Borough Council to create 14,200 new jobs (net) 2001 – 2021. In the Core Strategy Colchester has defined strategic employment zones in North Colchester, Stanway, Knowledge Gateway and the Town Centre.

3.6 The economy in Tendring is characterised by the abundance of SMEs across a wide range of sectors. Over two thirds of the businesses in Tendring employ less than five staff and gross weekly pay rates are significantly lower than the regional average. Some of the major sectors include tourism, port and logistics, marine leisure, public services and healthcare. The number of new businesses registering for VAT is significantly below the national average, but has remained fairly static for a number of years.

3.7 In Tendring the total requirement is 6,100 new jobs between 2001 and 2021 (3300 delivered so far).



Plan P3 Strategic Employment Sites in the Haven Gateway

4 Components of Future Growth - infrastructure provision and constraints to growth

Infrastructure Provision

4.1 The Haven Gateway Partnership has identified nine immediate Investment Packages, together with a tenth, longer term (and more speculative), initiative. However, discussions have already commenced with the Greater Haven Gateway Partnership to strengthen the housing information and delivery possibly through a specific thematic housing chapter. These packages are listed below (in no particular order):

- Spatial Package 1: IP-One – with a spatial focus on central Ipswich
- Spatial Package 2: IPA-East – a spatial focus on the eastern part of the Ipswich Policy Area, which includes Adastral Park (Innovation Martlesham)
- Spatial Package 3: North Colchester
- Spatial Package 4: East Colchester
- Spatial Package 5: Colchester Town Centre
- Spatial Package 6: Haven Gateway Coastal Towns Regeneration
- Thematic Package 1: Transport
- Thematic Package 2: Green infrastructure
- Thematic Package 3: Culture and Tourism
- Long Term Investment Package: Strategic Employment Sites and Land Release.

Integrated Development Programme

4.2 The Haven Gateway has benefited from working within the Regional Cities East pilot of EEDA's Integrated Development Programme which will provide a more comprehensive view of the infrastructure and investment requirements of the sub region. It has primarily concentrated on economic, transport and environmental requirements and the ambition is to improve the understanding of the housing – particularly affordable housing, cultural and health requirements.

4.3 The Infrastructure projects for Colchester and Tendring are listed in the table below although the funding information is only indicative as it changes frequently . (In addition INTend has an additional 16 regeneration projects to deliver for which the project details are being developed and will be available in the next 6 months.) Although significant investment has been achieved or in the pipeline there is still a sizeable funding gap between what is needed and what is currently allocated.

Infrastructure Projects

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured (Does not include other funding sought but not yet secured)	Shortfall
Acceleration of North Colchester Park and Ride	Colchester	GAF funding, EEDA, ECC, LTP	£6M	£1.2M	£4.8M
A12 Junction	North Colchester	CIF, Private development, EEDA, ECC	£22.2M	£3m secured from EEDA, Shortlisted for £10.2 CIF funding subject to further business case	£13.2M (provisionally secured through S106)
North Colchester BIC	Colchester	GAF, EEDA, CBC contribution through land sale	£2.9M	£2M Remaining funding thrugh sale of land and further EEDA bid	£900,000
Hythe Station Improvements	East Colchester	S106, GAF, Network Rail	£1.6M	£1.6M	0
Knowledge Gateway	East Colchester	University, GAF, CBC, ECC, EEDA	£8.45M	£1M from GAF £1.5M sought from EEDA	£6M
East Colchester Rapid Transit Link - feasibility	East Colchester	GAF	£100,000	£50K 2008 / 09 £50K 2009 / 10	0
Greenlinks	East Colchester	EEDA, S106	£1.9M	£79K for feasibility study	£1.82M
Historic Town centre Improvements	Colchester Town Centre	GAF, S106, ECC, CBC	£2M	£800K GAF funding	£1.2M

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured (Does not include other funding sought but not yet secured)	Shortfall
St Botolphs Public Realm	Colchester Town Centre	GAF, S106, EEDA	£4.75M	£1M GAF S106 - £150K	£3.6M
North Colchester Rapid Transit link and A133 improvements	Colchester	GAF, EEDA, ECC, LTP	£4.65M	£600K EEDA £750K LTP £800K ECC	£2.5M
Colchester Urban transport Package	Colchester	GAF, Cycle England, ECC, S106	£5.07	Cycle England £2.1M	£2.97 (£2.1 to be match funding from S106 & ECC
Transport infrastructure to support LDF growth	Colchester	GAF, EEDA	£200K	£100K	£100K
Green Infrastructure implementation team	Colchester as part of Haven Gateway	GAF, EEDA	£263K	£80K EEDA	£183K
Public realm strategy	Colchester	GAF	£50K	0	50K
Phase 1 harwich Masterplan	Harwich	Growth Point, Local Authority	£3.8M	£1.8M	£2M
Masterplanning / Regenreation	Walton	Growth Point / EEDA (£2.1m), S106	£13.1M	£100K	£13M
Town centre enhancement / Regeneration	Clacton	Growth point / EEDA (£2m) S106	£7M	£100K	£6.9M

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured (Does not include other funding sought but not yet secured)	Shortfall
Regeneration of Brookland and Grasslands	Jaywick	Public Sector (Gvnt, ECC, TDC, EEDA, HACA, GoEast)	£45 - 75M	£500K	£45 - 75M
Public access - Linear Park	Dovercourt	Growth Point / S106	£425K	£400K	£25K

Constraints to Growth and Other Issues

4.4 The provision of new physical infrastructure in the sub region has failed to keep pace with the growth in housing and population. This is probably most acute in the case of transport investment at both sub regional and local levels. The current economic climate has had a considerable impact on the new development but particularly in the housing market. In the Haven Gateway knowledge based activity is good but lower than regional average and relative performance shows it may be slipping.

Colchester

4.5 Houses are still being bought and sold in Colchester but in the mid range only and the market has slowed significantly. The level of new planning applications has dropped dramatically and significant residential development has stalled. The potential of the A12 junction to be delivered in 2011 together with the prospect of forward funding of related infrastructure is one measure which seeks to address this deficit and will unlock major land supply (housing and employment land) in North Colchester.

4.6 Although Colchester's projected employment growth in terms of jobs numbers is ahead of the RSS target there are concerning issues relating to the quality of employment growth and projected performance on a GVA per job basis. The incidence of people of working age with no qualifications is 4% higher than the regional average. Business start-up rates are similar to the average for the Haven Gateway but notably lower than the average for the region and the quantity of available business incubation space is below the current and forecast demand.

4.7 There has been an issue around the supply of employment land in Colchester which although apparently plentiful the available sites have been considered to be of poor quality. The Council has however taken steps to ensure there are a range of good quality sites available immediately including a new allocation at Stanway within the Strategic Employment Zone. Progress on the new A12 junction will also unlock additional land in North Colchester.

Tendring

4.8 *Flooding*; A number of the major regeneration areas are within flood plains (some flood zone 3b) which has significant impact on viability of either residential or commercial development.

4.9 *Ownership*; One of the major allocated employment sites is in multiple ownership which has posed difficulties in negotiating agreements for the site to be released for use.

4.10 *Location*; All of the allocated major employment sites are located in or around Clacton and Harwich. This has posed a number of problems relating to access from the main trunk roads, flooding and desirability for developers who have expressed a wish to see sites 'closer to Colchester'. This issue is being investigated through the LDF Employment Land Study where workshops invite comments as to whether the existing land supply is sufficient, in the right location or where any new allocations should be.

4.11 Port expansion; Harwich international Port has approved plans for a major redevelopment at Bathside Bay which when developed will be able to deliver a significant proportion of the new jobs required within Tendring as well as a potential upgrade to the A120. the challenge being faced is one where Bathside Bay is not developed or delayed as this would have a major impact on the regeneration of Harwich and the A120 corridor.

4.12 The five towns in Tendring (combined population 100,000) exhibit to varying degrees the lack of investment and evidence of acute deprivation. For Clacton and Harwich significant housing growth is planned and it will be important that appropriate jobs growth is encouraged: at the last Census there was net out-commuting even from Clacton suggesting the towns were at risk of becoming places to live rather than work.

4.13 For the future the assessments of precisely what is needed, why and how it may be achieved varies for each of the towns. Progress towards addressing the needs is also at different stages with plans for Harwich well established and those for Walton in the early stages of development. The majority of proposals already agreed or likely to emerge will seek to stimulate private sector investment and confidence by public agencies working together to contribute to the provision of the necessary infrastructure to unlock development potential. The Package also seeks to encourage land assembly projects which will become turnkey projects to secure private sector investment and venture capital.

4.14 The current strategy to seek major private sector investment will require a significant review in the current economic climate where there will be increased need for public led regeneration.

Specific transportation issues

4.15 The Haven Gateways focus is on strategic road and rail networks (A12, A14, A120) and on congested urban centres (Colchester and Ipswich).

4.16 The 2007 Colchester Business Survey identified congestion as the biggest issue for local businesses. 8% of businesses surveyed would consider relocating if this issue is not tackled. Improvements to transport in the urban centre of Colchester are a priority. There are a number of key transportation projects around the borough to be delivered over the next few years - A133 improvements, A12 junction and infrastructure, park and ride, North and East Colchester rapid transit links, rail station improvement for all three stations, Colchester Cycle Town status and the Historic Town centre improvements.

4.17 Tendring enjoys relative good communication links by road and rail to Colchester and London, however there is some expectation that the A133 between Frating and Weeley and the A120 from Hare Green to the Ramsey junction will reach capacity by 2021. The A120 upgrade is included in the Bathside Bay expansion plans, but there are currently no plans for an upgrade to the A133 between Frating Green and Weeley – an existing bottleneck for commuter and visitor traffic. As part of the Bathside Bay proposals, some concern has been raised about the increase in lorry

movements on the A120 post any potential upgrade. The upgrade of Felixstowe to Nuneaton rail line to accommodate freight transport will allow for some of the additional lorry movements to be converted to rail.

4.18 There has also been concern raised about the lack of right turn from Clacton to Harwich on the A133. The A133 offers no opportunity for drivers coming from Clacton to turn right towards Harwich, instead traffic is directed towards Colchester and the A12. This restricts the movement of residents and commercial traffic between the two main towns in the District. As nearly 60% of commuting to work is by car these infrastructure issues could have a significant impact on any potential growth.

5 Delivery Mechanisms

5.1 The Haven Gateway Partnership was set up in 2001 and is an established sub regional partnership. It agreed its framework for growth in 2007 setting out its priorities over the next 15 – 20 years and secured £17.5m Growth Point funding through this for the sub region. It has a full time chief executive and a small team based in Colchester to lead the work and the Partnership Board has a strong business presence on it.

5.2 The Partnership is structurally split into six working groups which meet regularly to discuss projects and activities within their sector, and report back to the partnership's Board. These are: Education & Skills, Transportation and Infrastructure, Planning and Regeneration , Marketing & Promotion , Business Development and Tourism and Culture.

5.3 In early 2008 Tendring District Council established INTend, a regeneration company to deliver on major physical economic, social and environmental regeneration projects within the District.

5.4 In Colchester delivery is largely led by Colchester Borough Council through its Executive Directors Strategic Policy and Regeneration Team.

6 Appendices

Appendix A

Local visions

Colchester Borough Council

6.1 The vision of the Council's new joint Cabinet is 'to make Colchester a place where people really want to live.' This, together with the 9 priorities (job creation, affordable housing tackling congestion, young people, older people, community development, healthy living, 'reduce, reuse recycle' and community safety are currently being consulted on to deliver a new Strategic Plan in 2009.

The LSP in Colchester 'Colchester 2020' has an ambitious vision;
Colchester, excelling as a prestigious regional centre that is:

- an iconic destination for culture and learning nationally and internationally
- renowned for sustainable economic growth
  …and therefore a place where everyone has the opportunity to achieve their full potential'

Tendring District Council

6.2 TDC's vision is 'to become a cleaner, safer and thriving District with a high quality environment and strong local economy'.

6.3 The LSP's Sustainable Community Strategy has 10 key priorities – jobs, health, lifelong learning, crime, transport and access to services, young people, environment, active citizens, housing and deprivation.

INTend objectives include;

- To achieve physical, social and environmental regeneration throughout the District
- To create attractive and sustainable places to live, work and visit
- To value and support the rural diversity of Tendring
- To increase opportunities for participation in leisure and cultural activities
- To promote the interests of all localities in the District with an area based regeneration framework
- To support measures to address the specific needs of Jaywick

And their priorities are;

- Address the root causes of deprivation in west Clacton and Jaywick
- Deliver sustainable high quality solutions to address growth and regeneration
- Maximise the benefits and manage the impacts of the Harwich International gateway
- Develop a skilled workforce

- Influence the sub regional agenda
- To ensure that integrated transport solutions are delivered.

Appendix B

Existing housing market characteristics

6.4 There are 71,192 dwellings in Colchester with a net increase in households of 1425 per annum. Colchester, in line with the region has significant 'in migration' – 35% movers in the last two years moved into the area from elsewhere. The average incomes of households moving in are lower than of those moving out.

The relevant Colchester SHMA outputs are;

- 72% dwellings are owner occupied, 13% social rented, 8% private rented, 7% other public sector (inc MOD and University)
- Average household income £31,396, median household income £23,874
- 5.1% private sector dwellings have a category 1 hazard requiring immediate attention (requiring £12m to deal with these dwellings)
- 14% of renters are in unsuitable housing representing a quarter of all those in unsuitable housing
- Between 2000 and 2006 about 31% of new dwellings constructed were flats and in 2006 flats represented about 17% of total housing stock (increase of 2% from 2001)

6.5 In Tendring there is an overwhelming need for affordable housing (over 1,500 units per annum) mainly in the social rented market. This is more than 3 times the number of all kinds of housing expected to be built. The majority of demand for both market and affordable housing is in the Clacton area and this demand is spread across all house sizes.

- 79% of dwellings are owner/occupied, 8.8% social rented, 8.4% private rented and 3.8% other rented including tied properties.
- The average gross household income for households in the District is £20,499.
- There is an annual shortfall in affordable housing provision of 453 properties. In the owner-
- ccupied sector, the main shortfall is for one and two bedroom homes but there is a surplus of three and four bedroom accommodation. There is a large surplus of private rented housing for all dwelling sizes.
- 4,761 households are currently living in unsuitable housing (7.9% of all households).
- Of those in unsuitable housing 39.7% needed to move to different accommodation to solve the problem, representing 1,888 households. Of these 1,380 would be looking to remain living in the District.
- It is estimated that there will be an additional 889 households forming per year in the Tendring District over the next 5 years of which it is estimated 73.4% will be unable to afford private sector housing.
- There are 3,500 homes in the private sector that do not meet the minimum housing fitness standard, which represents 6.2% of all private homes in the district.

Existing job market characteristics

6.6 Colchester's economy is markedly Service dominated with 85% of all employees in this broad activity area. Breakdown of employee jobs by industry (2006) was;
Manufacturing (8.9%), Construction (4.9%), Distribution, hotels & restaurants (26%), Transport & Communications (4.7%), Public Administration, education & health (31.1%), Tourism related (8.4%), other services (5.6%).

6.7 Labour supply in Colchester is currently 89,800 with 44% employment by occupation in Soc 2000 major groups 1-3 (above regional average) and 10% in group 9 (Below regional average). 33,100 (30%) have qualifications of NVQ4 and above (well above national and regional average) but conversely 37.2% of working population are not qualified to NVQ Level 2. The average gross weekly earnings (2007) are £417 (Below regional average). Tourism in Colchester is worth an estimated £189.6m to the local economy.

6.8 The largest individual business in Tendring is The Book service which employs over 400 people and Harwich International Port which employs 267 people. The two largest combined sectors are tourism which still employs 3,700 people and public admin, education and health which employ 11,300 people.

Appendix C

Demographic context

Colchester

- Colchester's population was estimated to be at 175,500 people in mid-2007. This was an increase of 12.5% (19,500 people) between mid-2001 and mid-2007 and makes Colchester the largest and fastest growing district in Essex County and the second largest district in the Country.
- There are 40,900 young people living in the borough aged between 0 and 19 years. This accounts for 23.3% of the total population at mid-2007. There are 29,900 people in Colchester of retirement age (60+yrs for females, 65+years for makes) accounting for 17.0% of the population.
- It has been estimated that the population of Colchester will rise to 223,500 people in 2021. This is a very significant growth and indicates a population change of 30.9% between 2006 and 2021 (52,700 people).
- Mid-2006 population estimates show that ethnic minority groups account for 7.09% of the total Colchester population, an increase from 3.82% on Census Day 2001. This is also higher than the Essex proportion of 5.85%.

Tendring

- Tendring has a steadily growing population of around 144,600 with the second highest levels of net inward migration in regional terms.
- The resident population aged over 65 is 9% above the Essex average, while the population under 30 is 8% below the Essex average.
- Two thirds of the population live in the three main towns on the coast.
- Of the resident working age population of 74,600 over 20,000 travel outside the district to work, mainly in Colchester with a lower percentage commuting daily to London.
- Tendring has a higher than average proportion of economically inactive residents and lower than average numbers actively seeking employment.
- Tendring is the 29th most deprived District in the country with significant pockets of deprivation in Jaywick and West Clacton, which are in the top 3 most deprived wards nationally.

Health care and education issues

Colchester

- The health of people in Colchester is generally better than the England average.
- Life Expectancy is 78 years for men and 82 years for women. The difference in life expectancy between affluent and deprived areas is 4.3 years.
- In 2006, there were 1,932 live births in Colchester, an increase of 276 a year since 2001.
- Early death rates from cancer, heart disease and stroke are below England rates.
- Smoking rates are better than average but almost 1 adult in 4 still smokes. There are around 220 deaths in Colchester from smoking each year.
- There were 14,516 people (120/1,000 population) providing some form of unpaid care. Of these people there were 18% providing 50 or more hours of unpaid care per week in Colchester.
- GCSE achievement is similar to the national average. The level of education in the population and future health are linked, therefore improving educational attainment should be a priority for Colchester.
- The pressure on Colchester General Hospital's capacity to meet demand is increasing.

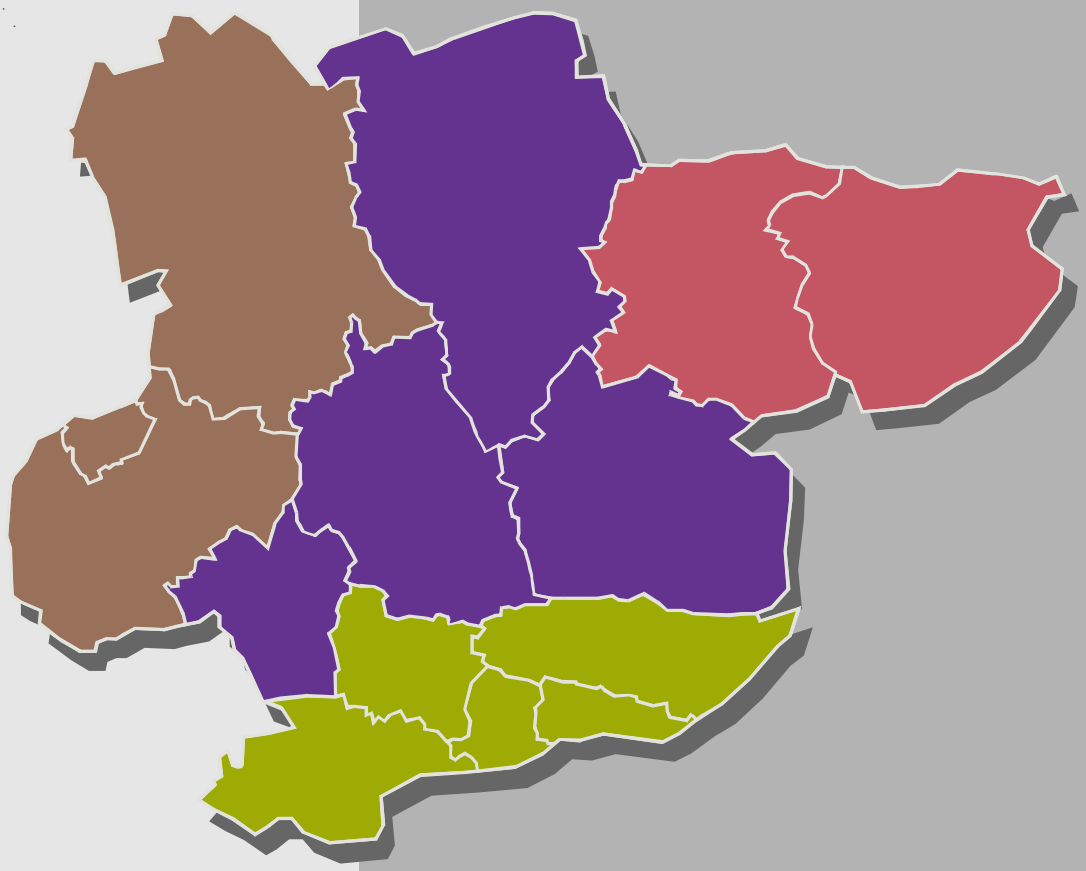
Tendring

- There is a tangible link between deprivation and poor health in the District. The difference in life expectancy between the affluent and deprived areas in Tendring is up to 13 years.
- The percentage of residents with a limiting life long illness is significantly greater than the regional or national figures.
- Over 11% of residents are providing informal unpaid care to relatives. There is a higher occurrence of teenage pregnancies and infant mortality within the District that Essex or the Region

- In ‘value added’ terms schools in Tendring perform relatively well with a significant range of specialisms, good OFSTED reports and innovative vocational and work based learning.
- GCSE results are improving but the attainment of NVQ2 and above is still significantly below the national and regional averages and the percentage of the workforce with no qualifications is 10% above the national average.

Strategic Countywide Economic & Housing Issues

Heart of Essex Position Paper



November 2008

(Updated July 2009)

Contents

1 Introduction and Context

1.1 This paper has been prepared for the Essex Chief Executives' Association sub-group that is considering Economic and Housing issues across the four sub-regions of Essex (Thames Gateway South Essex, Haven Gateway Essex, M11 Corridor and Heart of Essex).

1.2 Specifically the paper sets out a suggested vision for the future growth of the Heart of Essex based upon information provided by the four district Councils that make up the sub-region – Braintree, Brentwood, Chelmsford and Maldon.

1.3 It also identifies the range of infrastructure needed to deliver this growth and possible constraints to its delivery

2 A Vision for the Heart of Essex

2.1 Each authority within the Heart of Essex has a corporate vision for their district and these are reproduced within the appendix to this paper.

2.2 These four visions demonstrate a desire to maintain and enhance the quality of life for people and communities within the sub-region, to protect key environmental assets and, in the case of Chelmsford, to position the town as a leading regional centre. A shared vision based on these themes is apparent.

2.3 The Heart of Essex is a prosperous and thriving sub-region that has, and will continue to, make a significant contribution to regional housing and economic growth requirements. This has been recognised within the East of England Plan which proposes that the sub-region should deliver nearly 30,000 new homes and a share of 56,000 jobs in the period to 2021.

2.4 Across the sub-region the majority of housing growth will be focused within Chelmsford (16,000 homes) and Braintree (7,700 homes). Limited growth will occur in Brentwood and Maldon (5,900 homes in total). Infrastructure investment will be focused along the A12 and A120 corridors, enabling growth in those areas to be matched by necessary improvements to road, rail and public transport. Matching future growth beyond 2021 to these significant infrastructure improvements and the benefits that this brings is likely to be a key objective for the future spatial planning of the Heart of Essex sub-region.

2.5 The review of the East of England Plan to 2031 is suggesting growth at or above existing regional targets. Whilst it is not the purpose of this paper to pre-empt the review of the East of England Plan, it is very likely that Chelmsford as a Key Centre for Development and Change together with the urban centres of Braintree, Brentwood, Witham and Maldon will continue to be the focus for future growth within the sub-region. Nevertheless, given the level of growth anticipated, other spatial options will need to be considered where aspirations of bringing forward sustainable communities can be delivered. For example, this could mean considering growth in conjunction with other significant infrastructure investments, such as Crossrail.

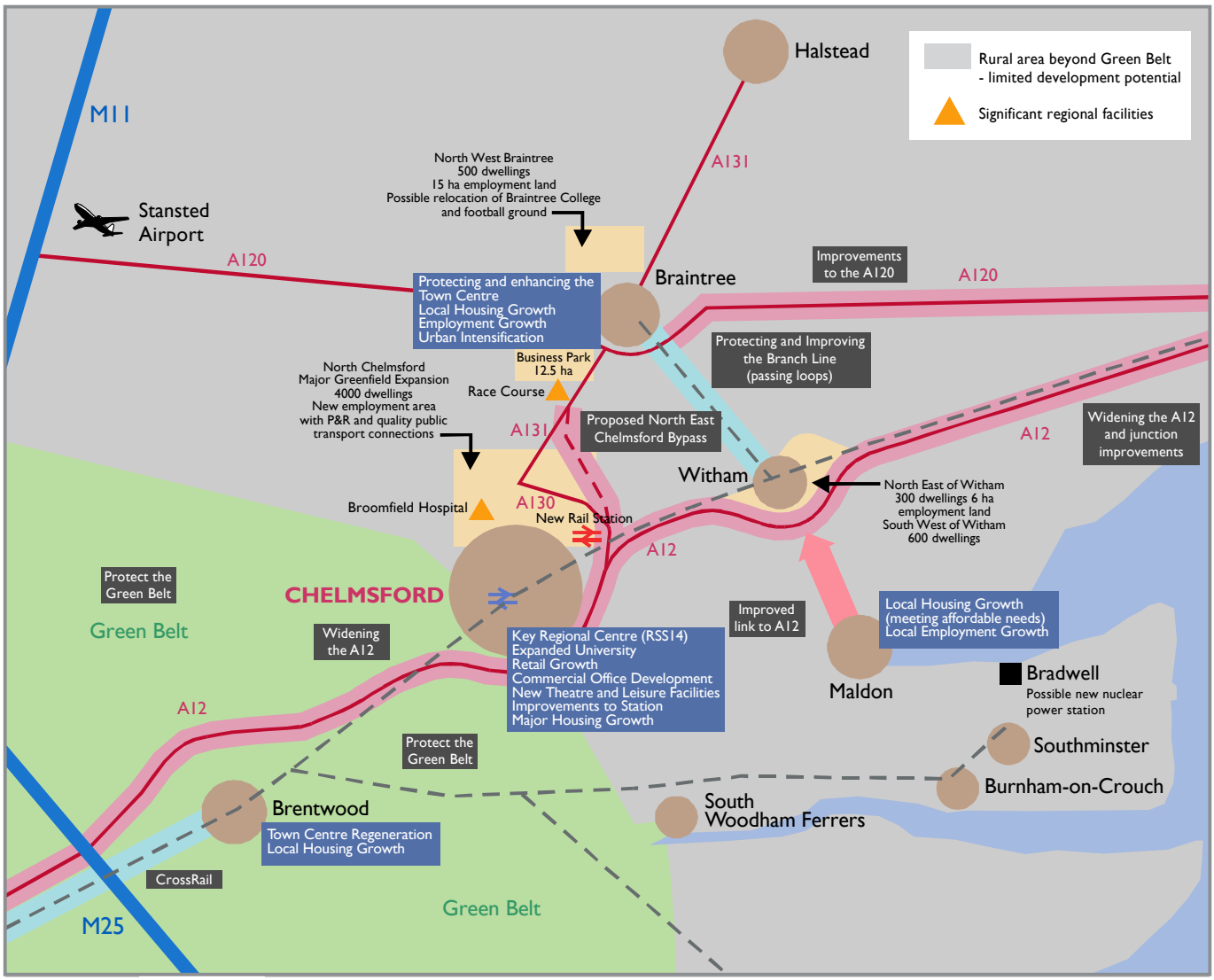
In broad terms the likely future pattern of growth across the Heart of Essex within the current regional planning period and the period beyond to 2031 can be summarised as follows:

2001 - 2021	2021 - 2031
Key Centre for Development and Change (KCDC) Concentrating major commercial and residential growth within the existing urban area, supported by sustainable 'greenfield' urban extensions and accompanied by the necessary infrastructure improvements Chelmsford: 16,000 homes and 20,000 jobs	**Continued Expansion of KCDC** A continuation of the existing strategy through to 2031 Chelmsford
Expansion of Town Centres / Urban Areas Focusing growth on the town centres and urban areas in order to consolidate and extend the towns' position as important sub-regional commercial and employment centres Braintree: Share of 7,700 homes and 14,000 jobs Witham: Share of 7,700 homes and 14,000 jobs	**Expansion of Town Centres / Urban Areas** A continuation of the existing strategy through to 2031 Braintree Witham Brentwood Maldon
Consolidation of Town Centres Securing growth to consolidate the towns' functions, particularly in retail and employment terms, with initiatives aimed at town centre regeneration Brentwood: 3,500 homes and 4,000 jobs Maldon: 2,400 homes and 1,000 jobs	**Consolidation / Limited Expansion of Existing Centres** A continuation of the existing strategy through to 2031 Burnham Halstead South Woodham Ferrers
Supporting Existing Centres Limited growth to secure that the towns' existing roles and functions continue to be supported and maintained but with no significant growth beyond existing urban areas Burnham, Halstead, South Woodham Ferrers, Southminster	

Based on the above mentioned factors the future vision for the Heart of Essex could therefore be focused around the following:

The creation of a thriving sub-region that makes a significant contribution through the creation of vibrant and sustainable communities to the economic and residential growth of the East of England which builds upon the role of existing urban centres and enhancement of transportation and accessibility links, and where key environmental assets and the area's historical character are protected and a high quality of life is provided for existing and future residents.

Figure 1: The spatial distribution of growth in the Heart of Essex



2.6 This emerging Vision will be underpinned by key objectives, as follows:

- To secure sustainable patterns of development
- To focus growth in the existing urban centres in the Heart of Essex
- To secure the necessary transportation improvements, including public transport
- To meet the housing needs of the whole community
- To safeguard key environmental assets
- To support and maintain a vibrant local economy which provides employment opportunities across all sectors

Components of Future Growth

3 Heart of Essex: Growth targets and spatial distribution of growth

3.1 The East of England Plan requires the provision of 29,600 homes within the Heart of Essex and the provision of a share of 56,000 jobs (along with the districts of Epping Forest, Uttlesford, Harlow, the M11 Corridor districts).

3.2 In terms of delivering housing growth, 80% of new homes will be provided within Braintree and Chelmsford districts (23,700 homes) with the remaining 20% being provided within Brentwood and Maldon (5,900 homes).

Figure 2: Housing Growth in the Heart of Essex: 2001-2021

Housing Growth
2001 – 2021

Braintree	- 7700 homes
Brentwood	- 3500 homes
Chelmsford	- 16000 homes
Maldon	- 2400 homes

Source: East of England Plan 2008

3.3 The four districts within the Heart of Essex are all at different stages in preparing their respective Local Development Frameworks, but the following analysis is based upon the latest available information.

3.4 Spatially, growth within the Heart of Essex will be directed to:

a) Within the existing urban areas and town centres
b) Within greenfield allocations in north Chelmsford, south west/north west Braintree, north east/south west Witham

3.5 Greenfield allocations to accommodate growth will therefore be focused in a north Chelmsford-Braintree-Witham triangle within the A12 and A120 corridors. These two roads and improvements to them are critical to the delivery of the growth strategy.

3.6 In terms of delivering employment growth there are no specific targets for individual districts within the East of England Plan. Rather, the Plan provides for indicative targets for net job growth within the plan period on a sub-regional basis (56,000 for the rest of Essex sub-region, which includes the four Heart of Essex districts).

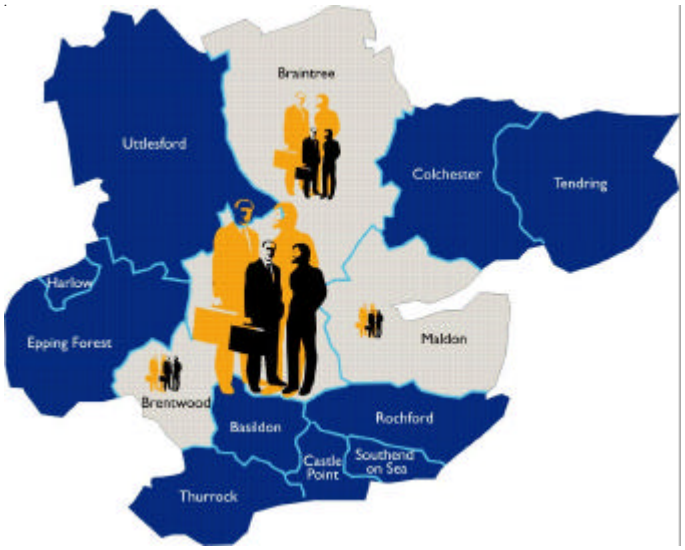
3.7 The Heart of Essex is in a good position to deliver new jobs in the coming years. In the period 2001-2006 significant job growth has taken place in Chelmsford and Braintree where over 9,000 new jobs have already been delivered. Chelmsford and Braintree have developed job growth forecasts/t targets in taking forward their Local Development Frameworks, which suggest economic growth potential well beyond their share of the East of England Plan indicative "rest of Essex target". In Chelmsford the forecast is for 20,000 jobs in the period 2001-2021 and in Braintree the target is for 14,000 jobs in the period 2008-2025. Economic Activity in Maldon will be lesssignificant, although the Bradwell Nuclear Power Station will be of major significance in delivering economic growth in that part of the sub-region. The potential for economic growth within the sub-region has been confirmed and corroborated by independent studies, notably the Mid Essex Economic Futures Study carried out by the University of the West of England, which indicates the potential for some 46,000 jobs in the sub-region.

Figure 3: Job Growth in the Heart of Essex: 2001-2021

Enhanced job growth forecast:

Braintree	– 14900 jobs
Brentwood	– 4100 jobs
Chelmsford	– 23900 jobs
Maldon	– 3500 jobs

Source: Mid Essex Economic Futures, UWE 2006



3.8 Spatially, economic growth will be focused within the town centres of Chelmsford, Braintree and Brentwood, as well as within new employment areas in greenfield allocations at south Chelmsford, north Chelmsford, north-west Braintree and south-west Braintree.

3.9 The key drivers of economic change in the sub-region will be a developing service, health and public administration sector, together with a drive to develop high value jobs within the financial, ICT, electronic engineering and professional service sectors. With a large pool of well skilled and educated labour the sub-region is in a stong position to build on these strengths in the coming years.

3.10 Although all four districts are at different stages of their Local Development Frameworks the following conclusions can be drawn at this stage:

a) that the majority of growth will continue to take place in Chelmsford and Braintree districts
b) that the Heart of Essex is in a strong position to deliver significant economic growth well beyond the regional indicative targets contained within the East of England Plan
c) that beyond existing urban areas, greenfield allocations to accommodate growth will be focused in a north Chelmsford, Braintree and Witham triangle within the A12 and A120 corridor.

3.11 Figure 1 (page 3) shows diagrammatically how the spatial distribution of growth within the Heart of Essex will be likely to emerge in the period to 2021 and beyond.

4 Heart of Essex: Infrastructure provision and constraints to growth

4.1 As with the rest of Essex the infrastructure provision required in the Heart of Essex to support the required levels of growth is significant. A comprehensive range of infrastructure has been identified in the first stage of this piece of work within Chelmsford, Braintree and Brentwood. Maldon is currently undertaking an infrastructure audit to inform the production of their Local Development Framework and have at this stage identified issues with flood alleviation, public transport, accessibility as well as locally generated requirements. Although the sub-region's infrastructure needs are far reaching, the responses from within it have tended to focus on transportation related infrastructure (with the exception of Chelmsford where infrastructure provision related to flood alleviation, leisure provision and education provision is also included). The most significant infrastructure projects within the sub-region are as follows:

Transportation infrastructure	Environmental infrastructure	Social, educational and health infrastructure
Nationally significant	Chelmsford flood alleviation scheme	New secondary school, Chelmsford
M25 dual 4 lane junctions 27 - 31 Crossrail	Maldon flood defences	Expansion of ARU, Chelmsford
A12 improvements	Green infrastructure	Relocation of Braintree and Chelmsford Colleges
A120 improvements Braintree to Marks Tey		Expansion of Broomfield Hospital
Regionally significant		
A130 North East Chelmsford Bypass		
North East Chelmsford Rail Station		
Locally significant		
Park and Ride Chelmsford		
Braintree branch line improvements		
Improvements to B1019		

4.2 The infrastructure identified across the sub-region is extremely varied, ranging from schemes of national significance (for example, Cross Rail in Brentwood) through to much more specific local requirements (for example, the Braintree Freeport foot/cycle bridge). Accordingly, all infrastructure identified at this stage has been sub-divided into: national significance, regional significance and local significance and a full schedule of infrastructure identified across the sub-region is contained within the appendices to this paper.

4.3 What is clear is that there is a significant funding gap if all the infrastructure identified is to be provided. The total cost of identified infrastructure within the Heart of Essex (excluding Maldon's needs and the nationally significant schemes the total cost is in the region of at least £830 million). Whilst progress is being made on identifying a range of funding sources to make provision for infrastructure (Growth Fund/Community Infrastructure Fund, Planning Contributions/CIL, Essex LTP, DfT Major Scheme Funding, etc) there is still a significant funding gap within this part of Essex.

4.4 The identification of priorities is an issue that will need to be taken forward, possibly through this piece of work in terms of ensuring that the needs of this part of Essex are made explicitly clear to regional and national government.

5 Heart of Essex: Other identified issues

5.1 Whilst the primary issue for the Heart of Essex is matching growth requirements with infrastructure delivery, a number of other issues have been identified across the sub-region which will need to be addressed in the coming years in order to create vibrant, sustainable and economically active communities. In addition, the provision of appropriate, accessible and high quality health core services that match the growth of the area will be an important issue in the coming years. The Strategic Housing Market Assessments demonstrate a shortfall in affordable housing within the sub-region that will require significant investment to provide homes for the growing population. For example, the skills and educational attainment within the Maldon area are seen as a key priority for that District. Similarly, although not a major issue, deprivation does exist in small pockets within the sub-region and again may require interventions by authorities to work through their LSPs if genuinely sustainable communities are to be achieved.

5.2 A key priority for the authorities in the sub-region will be to support and encourage new initiatives in the short-term aimed at improving the delivery of affordable housing. Other initiatives will be needed to remove the pockets of deprivation that exist, and regeneration strategies such as that at NW Chelmsford provide an example of LSP-led strategies aimed at achieving.

6 Delivery mechanisms

6.1 Unlike in some other parts of Essex, there is neither a single partnership body representing the Heart of Essex, nor a single delivery vehicle or mechanism taking forward the growth agenda on behalf of the sub region and this is a potential weakness, which could be exploited by other bodies. The one Heart of Essex partnership that exists is the Heart of Essex Business Group (a sub-group of the Essex Business Consortium) established to represent business interests across the sub-region. However, this group is currently on hold. Apart from that, the picture across the sub-region is mixed, as the following paragraphs show.

6.2 Within Chelmsford, the Chelmsford Tomorrow Local Delivery Mechanism (LDM) is the primary partnership now taking forward the growth agenda, particularly in respect of the delivery of strategic infrastructure. Membership includes (at senior level) CBC, ECC, EEDA and the EA. In addition to the LDM the Chelmsford Partnership and its delivery groups are charged with the delivery of the Chelmsford Tomorrow Sustainable Community Strategy.

6.3 Within Braintree delivery is focused through the Braintree LSP, the Braintree Economy and Infrastructure Board and the Braintree District Economic Development and Transportation Partnership Board.

6.4 Chelmsford and Braintree have worked in partnership to prepare and submit to CLG a joint Programme of Development which has led to Growth Fund monies being directed to the two districts and an officer group meets regularly to take this work forward.

6.5 In Brentwood delivery is taken forward via the Brentwood LSP and its sub groups, a Town Centre Partnership Board, the Greater Essex Prosperity Forum, Brentwood Town Centre Renaissance Group and through Business Enterprise Conferencing. Maldon's LSP is considering how to restructure so that it focuses on delivery.

6.6 Despite these individual arrangements there would appear to be an opportunity for the four districts within the sub-region to work together for mutual benefit, particularly in pursuit of Government funding to deliver infrastructure.

7 Future development potential and key economic and housing issues within the Heart of Essex

7.1 Whilst the purpose of this paper is not to pre-empt the review of the East of England Plan, which has only just begun, it is very likely that in the review period of the Plan (i.e to 2031) growth at or above the proposed rates within the approved Plan is likely to be required within the Heart of Essex area.

7.2 At current East of England Plan housing requirements, that would mean an additional 14,800 additional homes within the Heart of Essex in the period 2021-2031 and indeed early work on the East of England Plan review is suggesting growth at higher levels than that.

7.3 At the same time, the East of England Plan review will address the issue of jobs targets, broad locations for development, together with regional transport, health and education infrastructure needs. Early work on the review is suggesting an Essex-wide job target of between 143,000 - 207,000 in the period to 2031.

7.4 The area has and will continue to make a significant contribution to housing and economic growth within the region. Without recognition of the Heart of Essex as a homogenous entity, there is a real danger that the districts within it will struggle to deliver their aspirations due to lack of funding. A change has started to take place in terms of additional funding (Growth Fund/ Community Infrastructure Fund etc), but this needs to be maintained and developed further.

7.5 In the wider context, the Heart of Essex will also need to address how best to attract new investment to deliver the ambitious job targets it has and at the same time deal with some of the skills issues and deprivation issues highlighted across the sub-region. For example , Maldon contains regionally significant concentration of skills deprivation.

7.6 It is likely that additional growth to 2031 will be directed towards Chelmsford and Braintree districts, given the constraints around Brentwood and Maldon. Whilst the location for this growth will need to be taken through the Local Development Framework process, locations where significant infrastructure investment is planned and will be taking place (i.e within the A12 and A120 corridor) are likely to come forward as part of this process.

7.7 Future Actions

It is considered that within the Heart of Essex Sub-region the following future actions are worth pursuing together:

- **Formal recognition of the role of the Heart of Essex sub-region by Government and regional Government**
- **An agreed pattern and scale of future growth for the sub-region to 2031**
- **An agreed approach to infrastructure prioritisation**
- **An agreed approach to tackling other issues within the sub-region that impact upon quality of life, for example skills, education and health**

Appendices:

1. The four district visions within the Heart of Essex

Braintree

"To improve, promote and support the well-being of people and communities in the Braintree District ensuring that local needs are met and are balanced against our duty to protect the District's special environmental qualities now and for future generations."

Brentwood

"To enhance quality of life in Brentwood ensuring it is a pleasant place in which to live, work and relax for the benefit of current and future generations."

Chelmsford

".....for Chelmsford to set the standards that other towns aspire to and for the town to become the economic, cultural, leisure and shopping capital of Essex and a leading regional centre in the East of England."

Maldon

"To be a sustainable coastal district, with a rich rural heritage underpinned by a vibrant local economy and active community life"

2. The key objectives and priorities for the four districts

Braintree

- To promote sustainable development
- To support thriving and sustainable communities
- To maintain and develop the vibrant and prosperous towns of Braintree, Witham and Halstead
- To reduce the need for travel
- To protect the countryside
- To deliver the required growth in ways which are compatible with environmental objectives
- To meet the housing needs of the whole community

Brentwood

- To ensure that everyone has access to appropriate local housing
- To ensure that all people lead healthy lives
- To preserve the environment and visual amenity of the Borough
- To reduce priority crime and disorder problems
- To ensure a prosperous and vibrant local economy

Chelmsford

- Excellent customer services – putting customers at the heart of the Council's work
- Renaissance – adopt the LDF to help deliver the Council's spatial vision
- Social inclusion – embrace equality and celebrate diversity
- Environment – maintain high quality public places
- Value for money – make the best use of our resources

Maldon

- Promoting civic pride
- Supporting an active local economy improving prosperity
- Increasing the affordable housing supply and balancing housing
- Improving accessibility
- Protecting and enhancing the natural and built heritage
- Ensuring active and cohesive communities

3. Heart of Essex: housing growth targets

District	East of England Plan requirement 2001-2021	New homes per year 2001-2021	Affordable housing target (%)	Affordable housing target (homes per year)
Braintree	7,700	385	40% on sites of 5 dwellings or 0.2ha or more	100
Brentwood	3,500	175	35% on schemes above 20 units or 0.66 hectare in Brentwood and 5 units/0.16 hectare in areas outside Brentwood.	N/A
Chelmsford	16,000	800	35% on sites over 15 units	160*
Maldon	2,400	120	30% on sites over 15 dwellings or 0.5ha	N/A

*Based on current LAA target to 2011

4. Heart of Essex: housing market characteristics summary

Braintree:

- At the end of 2006 the average property price in Braintree district was £210,028, higher than the average for England and Wales but lower that the average for Essex
- Housing tenure - 75.5% owner-occupied, 13.6% local authority rented (now transferred), 3% rented for a RSL, 6.6% private-rented, 1.3% other rented
- Housing composition – 26.6% detached, 29% semi-detached, 24.2% terraced, 10.2% bungalows, 10% flats/maisonettes
- Ongoing requirement for owner-occupied housing and potentially a large requirement for intermediate and social rented housing - assessed affordable housing need of 697 dwellings per year

Brentwood:

- High proportion of 3/4 bed properties
- High quality housing/few areas of poor housing
- Lack of affordable housing (high price to income ratio)
- 79.2% of housing is owner occupied
- 11.6% of housing is social rented (Council/RSL)
- Housing composition - 32.6% detached (9,694 households); 33.2% semi-detached (9,901 households); 16.5% terraced (4,900 households); 17.5% flats (5,154 households)
- House price levels (2006) - Detached £537,240; Semi £275,498; Terraced £216,604; Flat £177,614
- Median Gross earnings (2007) £34,028

Chelmsford:

- 78.8% of housing is owner occupied (53,860 households)
- 13.6% of housing is social rented (9,300 households)
- Number of households projected to grow in Chelmsford by some 700 per year over next 15 years
- Housing stock has grown in line with national average (8.1% growth 1995-2006)
- Significant house price growth above regional and national averages since 2001(average house price > £220,000 in 2006 from £140,000 in 2001)
- Chelmsford's housing market closely linked to Braintree
- Average household income level £36,055, median £28,774
- Social tenants and private rented tenants have little prospect, on average of buying
- Housing need most closely linked to affordability and special needs
- Using the CLG needs model, annual requirement for affordable housing is 866 homes per year, close to the regional average when indexed
- 33% in housing need could afford intermediate housing
- Net outflow of older people and single people from Chelmsford Borough
- Net inflow of multi-adult and households with children into the area

- 18.5% of existing households likely to move over next two years (12,658 households)
- Demand and need for all sizes and tenures – 54% of annual requirement is for market housing and of the affordable housing about 40% could be intermediate

Maldon:

Maldon district contains around 26,000 households with over 80% households owner occupied and only 11% of housing is provided by registered social landlords. Access to suitable housing of a decent standard plays a significant role in people's overall health and well-being. The growing income differential between commuters and local workers is reflected in the housing market: many homes are now priced beyond what local workers can afford whilst still comparatively affordable in comparison to some other parts of the county. Since 2000, the average house price has risen by 100% in Maldon district. Recent survey work has revealed that 85% of existing households in housing need cannot afford to buy and 73% cannot afford to rent in the market. The affordable housing need is 319 / annum. The current slowdown in the housing market and the fall in prices is unlikely to significantly change the affordability situation in the Maldon area as incomes lag behind those in other parts of the county.

5. Heart of Essex: employment growth targets

District	East of England Plan requirement 2001-2021	District forecast / target if known	Jobs delivered 2001 -2006	Mid Essex Economic Features (UWE) enhanced growth forecast 2001-2021
Braintree	share of 56,000 jobs	14,000 in the period 2008-2025	3,572	14,876
Brentwood	share of 56,000 jobs	4,000*	678	4,142
Chelmsford	share of 56,000 jobs	20,200 in the period 2001-2021	5,892	23,882
Maldon	share of 56,000 jobs	1000	213	3,523

* Based on UWE Research

6. Heart of Essex: employment market characteristics summary

Braintree:

- Low unemployment rates
- High proportion of out commuting – (2001 Census figures – 28,500 residents out-commute (43% of employed residents), 13,000 people commute into District for work, net outflow of 15,500 people)
- Average earnings are higher than the UK as a whole, East of England and Essex
- Braintree has a relatively low proportion of jobs in professional occupations
- 28% of residents have no qualifications
- Braintree has a high proportion of small businesses with a local focus

Brentwood:

- Service sector predominates –particularly financial/business sectors
- Large out commute 50% + (particularly to London)
- Similarly significant in commute of lower skilled workers (service sector) 40%+
- Low unemployment
- Workplace population (2001) was 32,667
- Economically active - 64.6%
- 2,535 VAT registered businesses (March 2007)
- 23.4% of residents have no qualifications

Chelmsford:

- 85,700 people economically active
- 5,500 VAT registered businesses
- Approx 77,000 jobs within LA area
- 16.8% of Chelmsford residents in employment commute to London (13,449), many employed in financial services sector
- 8% of Chelmsford residents (6,471) work in adjoining heart of Essex districts (Brentwood, Maldon and Braintree)
- 16.5 % of Chelmsford's workforce (12,437) comes from adjoining heart of Essex districts (Brentwood, Maldon and Braintree)
- Net out-commuting highest in following sectors: manufacturing, finance and other business activities

Maldon:

The area is generally prosperous, but there is a serious skills shortage and aspirations are low. The District has the highest proportion of working age population with no qualifications (32.8% compared to 17.3% in Essex, 14.0% in the East region and 13.8% nationally). The 2007 Indices of Deprivation demonstrate that education, skills and training deprivation are concentrated in parts of Maldon and Heybridge (Maldon East and Heybridge West wards) and in the Dengie (the wards of Southminster, Burnham-on-Crouch North and part of Althorne). Four of these LSOAs, Heybridge West, Maldon East, Southminster and Burnham-on-Crouch North, are ranked as the most deprived wards in the District for the indices of deprivation.

Some aspects of the local economy have changed as parts of the District become attractive bases for commuting to the county town of Chelmsford or to London, despite modest rail and road links (16.1% of working residents commute to Chelmsford and 11.9% to London). Consequently there has been a growing gap between the income levels of local workers and those who commute.

Infrastructure Projects

National | Regional | Local

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured	Shortfall
Braintree	* allocated by EERA from RFA for scheme development ** programmed for construction by HA in 2009/10 as part of a major maintenance scheme				
A120 Braintree to Marks Tey Dual 2- lane	Braintree to Marks Tey	Central Government Regional Funding Allocation	£310m	£60m*	£250m
A12 Hatfield Peverel to Marks Tey – provision of 3rd lane	Hatfield Peverel to Marks Tey	Central Government	?	0	£15
Braintree Branch line - frequency improvements	Braintree to Witham	CIL?	£15m	0	0
A12 Witham to Hatfield Peverel – additional lanes and junction improvements	Witham to Hatfield Peverel	DfT	**	**	
A12 Rivenhall – junction improvements	Rivenhall	DfT	?	?	
A120 Galleys Corner – junction improvements	Braintree	ECC/DfT	?	?	
Springwood Drive /Rayne Road junction improvements	Braintree	S. 106/CIL	?	?	

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured	Shortfall
Aetheric Road/Rayne Road junction improvements	Braintree	S. 106/CIL	?	?	£500k
Braintree Freeport – Foot/Cycle Bridge	Braintree	S.106/GAF	£700k	£200k	£200k
Witham Station – Footbridge extension	Witham	?	£2m	0	£1m
Motts Lane, Witham - foot/cycle bridge	Witham	CIL?	£1m	0	
Brentwood	* allocated by EERA from RFA for scheme development ** programmed for construction by HA in 2009/10 as part of a major maintenance scheme				
High Street Area Transportation Study	Brentwood Town Centre	Essex County Council Sect. 106 Funding	£5m		
M25 Dual 4 lane	Junctions 27-31	Department for Transport			
Crossrail	Brentwood and Shenfield Rail Stations	Crossrail Project			
A12 Dual 3 lane (now not being proceeded with?)	M25 - Chelmsford	Department for Transport			
William Hunter Way Car Park	Brentwood Town Centre	Sect.106. Funding for Highway works			

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured	Shortfall
Highways Localism – "Congestion Busting"	Boroughwide	Essex County Council			
Chelmsford					
Chelmsford Leisure Centre	Borough-wide	Via development and planning contributions	£30m	Project currently on hold	n/a
New secondary school/ sixth form provision	Borough-wide	Developer funding and planning contributions	£52.4m (Total cost of all education provision	To be met via planning contributions	-
Chelmsford flood alleviation scheme	Chelmsford urban area	Planning contributions, Environment Agency (revenue), Growth Fund	£14.155m	Element from Growth Fund not yet determined. £300 k from EA to develop preferred scheme. Planning Contributions	-
Army & Navy Roundabout improvements	Chelmsford urban area	ECC (LTP), Growth Fund, DfT bid, planning contributions	Up to £42m for all short, medium and long term improvements	£830k identified for short term improvements. Element from Growth Fund not yet determined.	Circa £40m
Chelmsford rail station improvements	Chelmsford urban area	Developer funding and planning contributions. DfT/ National Express	£10m	Planning application for New Street site likely to deliver planning contributions package of £7m	-

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured	Shortfall
Park and Ride: North Chelmsford	Chelmsford urban area	Planning contributions, LTP, Growth Fund, CIF 2 bid	£6.4m	CIF2 bid expected to provide £3.8m of funding. Remainder via combination of planning contributions, LTP and Growth Fund	£2.6m
Park and ride: Widford	Chelmsford urban area	Planning contributions, LTP	£6.4m	None	n/a
North east Chelmsford by pass and Boreham Interchange improvements	North Chelmsford	Developer contributions and DfT major scheme funding	£230-260m	To be met via DfT major schemes funding	£230-£260m
Chelmsford area rapid transit (ChART)	North Chelmsford	Planning contributions, LTP, DfT and Growth Fund	£5m	Element from Growth Fund not yet determined. Planning Contributions	£5m
North east Chelmsford rail station	North Chelmsford	Developer funding and planning contributions	£65m	-	£65m
New early years childcare and primary schools	North Chelmsford	Developer funding and planning contributions	£52.4m (total cost of all education provision)	To be met via planning contributions	-
Multi use sports centre	North Chelmsford	Developer funding and planning contributions	£3.5m	To be met via planning contributions	-

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured	Shortfall
Maldon					
Maldon Town Centre and Causeway					
Flood Alleviation					
Highway Improvements					

8. Heart of Essex: skills and qualifications

Occupational Group	Braintree	Brentwood	Chelmsford	Maldon	East of England
Managers and senior officials	13,600 (19.6%)	7,400 (23.0%)	17,700 (20.3%)	5,200 (17.2%)	16.2%
Professional occupations	6,200 (8.8%)	6,500 (20.1%)	15,300 (17.5%)	N/A	13.0%
Associate professional and technical	8,400 (12.1%)	5,600 (17.2%)	14,100 (16.2%)	3,800 (12.6%)	14.6%
Admin and secretarial	7,700 (11.1%)	3,100 (9.5%)	10,300 (11.8%)	3,200 (10.4%)	11.3%
Skilled trades and occupations	10,300 (14.7%)	N/A	5,400 (6.2%)	4,000 (13.2%)	11.3%
Personal service occupations	3,700 (5.4%)	N/A	4,300 (11.6%)	3,900 (12.9%)	7.7%
Sales and customer services	5,600 (8.1%)	N/A	5,700 (5.0%)		7.0%
Process plant and machinery operatives	5,100 (7.3%)	4,300 (13.2%)	4,000 (4.6%)	7,600 (25.1%)	6.9%
Elementary occupations	9,100 (13.0%)		10,200 (11.7%)		11.7%

Source: NOMIS Labour Market Profiles 2006

Qualfications	Braintree	Brentwood	Chelmsford	Maldon	East of England
NVQ 4 and above	19,600 (22.7%)	12,100 (28.6%)	33,400 (32.6%)	7,000 (18.8%)	26%
NVQ 3 and above	31,600 (36.5%)	20,100 (47.8%)	50,900 (49.8%)	11,900 (32.0%)	43.4%
NVQ 2 and above	53,700 (62.1%)	29,500 (70.0%)	73,300 (71.7%)	20,000 (53.5%)	62.2%
NVQ 1 and above	68,400 (79.0%)	33,700 (80.2%)	89,200 (87.3%)	26,100 (70.0%)	78.2%
Other qualifications	7,000 (8.0%)	3,000 (7.2%)	3,500 (3.5%)	3,800 (10.1%)	9.3%
No qualifications	11,200 (13.0%)	5,300 (12.6%)	9,500 (9.3%)	7,400 (19.9%)	12.5%

Source: NOMIS Labour Market Profiles 2006

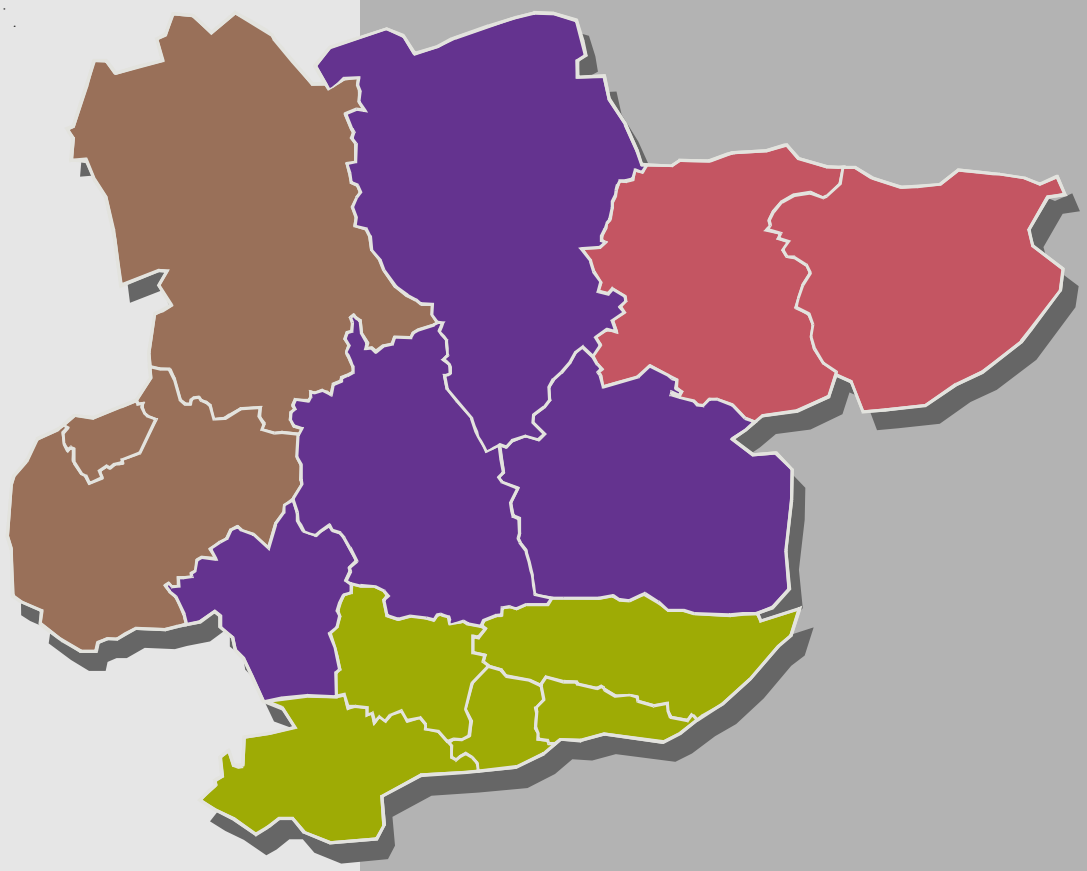
9. Heart of Essex: travel to work patterns

	Workplace															
Place of Residence	City	London Boroughs	Southend on Sea	Thurrock	Basildon	Braintree	Brentwood	Castle Point	Chelmsfprd	Colchester	Epping	Harlow	Maldon	Rochford	tendring	Uttlesford
Chelmsford	4184	9701	911	789	4280	2243	2809	331	47253	728	725	575	1448	603	80	928
Braintree	2020	4628	130	182	589	37617	617	40	6777	2840	365	378	1263	81	297	3298
Brentwood	2700	8981	160	755	1737	119	14818	72	1443	71	507	203	67	77	12	98
Maldon	882	2227	367	313	1324	1454	543	139	4199	886	83	84	15115	242	753	160

Source: 2001 Census

Strategic Countywide Economic & Housing Issues

M11 Corridor Position Paper



November 2008

(Updated July 2009)

Contents

1 Introduction and Context

1.1 This paper has been prepared for the Essex Chief Executives' Association sub-group that is considering Economic and Housing issues across the four sub-regions of Essex (Thames Gateway South Essex, Haven Gateway, **M11 Corridor** and Heart of Essex).

1.2 Specifically the paper sets out a suggested vision for the future growth of the M11 Corridor based upon information provided by the three district Councils that make up the sub-region – Epping Forest, Harlow and Uttlesford.

1.3 It also identifies the range of infrastructure needed to deliver this growth and possible constraints to its delivery.

2 A Vision for the M11 Corridor

The vision for the M11 Corridor is established in the Sustainable Community Plan (CLG, 2003) and the EEP (Go East, 2006). The vision is to create a sustainable employment-led growth corridor, conserving and delivering a high quality aviation gateway, realising its potential for sustainable growth and regeneration, and capitalising on its potential as a focus for hi-tech, knowledge-based employment

2.1 The emerging Vision will be underpinned by the following key objectives from the Programme of Development (POD) Partnership which was established to bid for, and spend, Growth Area Funds (GAF) and includes seven local authorities: Harlow, Epping Forest, Uttlesford, East Herts and Broxbourne Districts; and Essex and Hertfordshire County Councils; as well as a range of other partners including Harlow Renaissance and a variety of 'green' partners:

- Unblocking infrastructure to facilitate growth
- Enabling – creating the economic conditions to deliver growth
- Delivering housing growth
- Regenerating to facilitate housing growth and address current under-performance and deprivation
- Place-shaping – including exemplar projects, sustainability and interventions to address the image of under-performing areas

2.2 Each member District of the M11 sub-region share key ambitions. These ambitions are particularly pronounced in terms of a commitment to respecting the sustainability of the environment and employment and housing growth. Epping and Uttlesford especially have a shared commitment to protecting historical areas of heritage and focus on protecting the natural wildlife and bio-diversity of particular sites. Supporting and facilitating increased employment opportunities as well as promoting affordable housing are also identified as key priorities for each member District. Healthy lifestyles will also be promoted throughout and facilitated by sporting and leisure opportunities. Harlow has additional aims around raising education and skills aspirations and standards.

2.3 Each authority within the M11 corridor has a corporate vision for their district and these are reproduced within the appendix to this paper.

2.4 The Regional Economic Strategy recognises the sub-regional importance and opportunities presented by the identification of the M11 corridor as a major growth location and economic driver. Of key importance is the area's strategic location, both to the rest of the UK and internationally; and the strong presence in the area of world class R&D capability. The M11 Corridor, encompassing East Herts, Epping Forest, Harlow and Uttlesford should be identified as a sub-region, or engine of growth, in its own right.

2.5 Across the sub-region a large proportion of proposed housing growth will be focused in and around Harlow, in particular the area north of Harlow (urban extension into Epping Forest and East Hertfordshire) (16,000 new homes for the period 2001 - 2021). Uttlesford are required to supply 8,000 new homes for the area up to 2021 with a requirement to plan for housing delivery for 15 years from the date of adoption of the Core Strategy at a rate of 430 homes a year. Epping is required to provide 3,500 new houses within the district by 2021. Also an amount of Harlow's housing provision will encroach into the District.

2.6 The review of the East of England Plan to 2031 is suggesting growth at or above existing regional targets. As a Key Centre for Development and Change and having a major town centre of strategic importance for retail and other town centre purposes, it is likely that the area most affected by such plans will be Harlow. There are also implications for the Harlow area to grow further beyond 2031 although this is subject to the findings of the green belt review.

2001 - 2021
Key Centre for Development and Change (KCDC)
Sub-Region: 27,500 homes, 31,100 jobs (EEDA – RES, 2004) Harlow (KCDC)16,000 homes and 18,100 jobs (inc. proportion of E.Herts jobs target)
Expansion of Town Centres / Urban Areas
Epping Forest 3,500 homes and 3,960 jobs Uttlesford 8,000 homes and 9,050 jobs
Consolidation of Town Centres
Supporting Existing Centres

2021 – 2031
Continued Expansion of KCDC
Harlow
Expansion of Town Centres / Urban Areas
Epping Harlow Uttlesford
Consolidation / Limited Expansion of Existing Centres

3 M11 Corridor: Growth targets and spatial distribution of growth

3.1 The East of England Plan requires the provision of 27,500 homes within the M11 corridor and the provision of a share of 56,000 jobs (along with the districts of Braintree, Chelmsford, Brentwood, and Maldon).

3.2 In terms of delivering housing growth, 58% of new homes will be provided within the Harlow area including urban extensions in Epping FDC and East HDC (16,000 homes), 29% will be provided by Uttlesford (8,000 homes), with the remainder being provided by Epping (13%).

Figure 1: Housing Growth in the M11 Corridor: 2001 – 2021

Housing Growth
2001 - 2021

Epping	3,500 homes
Harlow Area	16,000 homes
Uttlesford	8,000 homes
Total	27,500 homes

Source: east of England Plan 2008

3.3 The three districts within the M11 corridor are all at different stages in preparing their respective Local Development Frameworks, but the following analysis is based upon the latest available information. Epping Forest and East Herts will be providing joint or coordinated Development Plan Documents to determine the distribution and scale of growth.

3.4 The figure of 16,000 homes for housing growth at Harlow includes urban extensions in Epping Forest and East Herts District. "The split between the Districts to be determined through development plan documents", (RSS)

3.5 Housing growth implications for Harlow-North (urban extension) in particular, also bring the need for corresponding investment in public transport and road infrastructure requirements.

3.6 In terms of delivering employment growth there are no specific targets for individual districts within the East of England Plan. Rather, the Plan provides for indicative targets for net job growth within the plan period on a sub-regional basis (56,000 for the rest of Essex sub-region, which includes the three M11 Corridor districts).

3.7 Spatial Job Growth Areas:

Epping

An Employment Land Review is shortly to be commissioned in partnership with Brentwood Borough Council. This will assess the current provision of employment land, the current and forecast demand and the opportunities for further provision. This will lead to discussions with the other "Rest of Essex" authorities to determine the appropriate level of growth in each authority to ensure delivery of sufficient employment growth. The Council is keen to maximise the limited opportunities for redevelopment within its town centres to ensure development that is both sustainable and contributes to economic prosperity.

Harlow

A study is being undertaken to gain a fuller understanding of Harlow's current Employment Land Utilisation, as well as to discern employment projections for the area and an intervention strategy. The findings of the study will be finalised within the next three-to-four months.

Harlow is currently reviewing its regeneration strategy, which will include development of an economic development strategy for the area. This will include an element of business growth relating to the increased capacity of Stansted airport.

Figure 2: Job Growth in the M11 Corridor: 2001 – 2021

Indicative Job Growth Forecast 2001 - 2021

Epping	3,960 jobs
Harlow Area	18,100 jobs
Uttlesford	9,050 jobs

* Jobs growth indicatively weighed to housing growth (RSS)

Total	31,100 jobs

Source: east Regional Economic Strategy 2004

3.8 Spatial Economic Growth Areas

Epping

An Employment Land Review is shortly to be commissioned in partnership with Brentwood Borough Council. This will assess the current provision of employment land, the current and forecast demand and the opportunities for further provision. This will lead to discussions with the other "Rest of Essex" authorities to determine the appropriate level of growth in each authority to ensure delivery of sufficient employment growth.

Harlow

Evidence documents such as the Employment Land Utilisation study and the Infrastructure Study contributing to the LDF will indicate capacity within the town and potential economic growth areas.

Uttlesford

An appraisal of Employment Land Issues in Uttlesford shows that the amount of land needed for employment will increase by between 14 and 25 ha in the period from 2001 to 2021.

3.9 Within the M11 corridor, Harlow is identified as a key centre for development and change (SS3 Policy). "The key centres are the main drivers of economic growth with potential for continuing growth after 2021."(RSS) In addition, the RES envisages a sub-regional economic and social role for Harlow.

Harlow aims to benefit from its existing knowledge based economy by developing and encouraging innovation and clustering within the sector. Similarly Harlow aims to support its manufacturing sector to innovate and compete in local, national and global markets. A key aim is to assist the growth of small and medium sized enterprises. Harlow has an opportunity to up-skill its local workforce through the presence of Anglia Ruskin University who are keen to work with local employers in order to develop a new higher education facility. The proposed development of Harlow Town Centre North will create a thriving mixed use offer, e.g. residential, retail, leisure and cultural opportunities. It is envisaged that housing growth will also stimulate business and employment growth for example within the service sector.

The recently announced increase flight and passenger provision for Stansted offers opportunities for economic growth within the sub-region. The airport acts as a Regional Interchange Centre for bus/coach and rail and is identified as a strategic employment site.

Major employers which have established and grown in Epping, or moved into the District include Higgins, Kier, Clinton Cards, Apollo London Ltd, Sainsbury's. Amstrad is to move to Loughton from Brentwood shortly. In addition, horticulture and farming and tourism and leisure are important sectors of employment. Epping Forest Council is keen to maximise the limited opportunities for redevelopment within its town centres to ensure development that is both sustainable and contributes to economic prosperity. The Council has actively produced a Vision and Development

Brief to influence future development within the Debden Broadway area and is to commence a similar exercise at a cluster of prominent sites within Epping town centre.

3.10 LDF status of each District – conclusions

Epping

The Vision for the district over the period up to 2031 will be set by the Sustainable Community Strategy and the Local Development Framework. The preparation of both of these documents has been delayed by the late approval of the EEP, and therefore the Vision for the district has not yet been formulated.

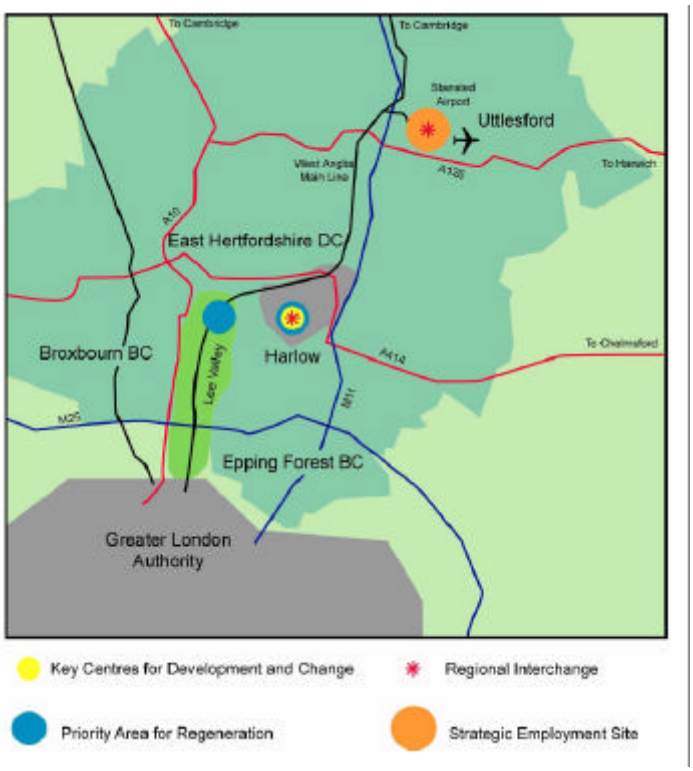
Harlow

As part of the preparation of the Local Development Framework, studies have been commissioned to ascertain both Infrastructure and Employment Land needs. Both of these studies have yet to complete but will do so within the next three-to-four months which will enable a more extensive assessment of major infrastructure requirements/projects to be arrived at.

Uttlesford

An appraisal of Employment Land Issues in Uttlesford shows that the amount of land needed for employment will increase by between 14 and 25 ha in the period from 2001 to 2021.

Figure 3: The spatial distribution of growth in the M11 Corridor



4 M11 Corridor: Infrastructure provision and constraints to growth

This section considers the current infrastructure provision then explores major issues and challenges (4.0) to the delivery of growth (4.2)

Epping

- Loughton, Roding Valley, Debden, Buckhurst Hill, Grange Hill, Chigwell, Theydon Bois & Epping are all on Central Line
- Roydon has the only station on the national train network
- Demand for car parking for commuters using Central Line stations is a significant issue
- The south of the district is served by the London Underground but other areas in the district, particularly the rural north, are not well served by public transport
- The highway network is intensively used, and this has implications for highway maintenance

Harlow

Harlow is well connected by road and rail to London, Stansted Airport and Cambridge. The M11 and M25 run close to the town, and Harlow's two rail stations are served by the West Anglia Mainline, with fast connections to London and Stansted Airport from Harlow Town.

Despite this excellent location, Harlow suffers from significant congestion due to:

- Only one motorway junction serves the town
- The A414 runs through the centre of the Town
- Employment areas are located in the Town Centre and to the North and West, whereas the motorway junction is to the south east

Other transport issues include, the distance between Harlow's train stations and the town centre and many residential areas; and behavioural and cultural issues including a tendency to use the car rather than the bus or walking, and a need to increase physical activity rates.

The Harlow Stansted Gateway Transportation Board is developing an Action Plan that will investigate, identify and justify transportation solutions for the Harlow Stansted area. This will provide the basis for the necessary infrastructure and investments required.

Uttlesford

- Improvements to Stansted Airport access from M11 and A120
- M11 widening
- Platform lengthening on Cambridge/Liverpool Street main line and four tracking between Broxbourne and Tottenham Hale

4.1 Infrastructure importance sub-divided into national / regional / local including a full schedule of infrastructure identified. (See 3.18 of the overview report)

4.2 Challenges and issues in providing the required infrastructure indentified.

Epping

Economic downturn

- S106 gains likely to be less
- Affordable housing will be more difficult to deliver as part of housing development
- Housing (and other) development is at risk of stopping altogether
- Impact on delivery of Regeneration Briefs in Debden & Epping

Implementation of Sub-National Review

- Work of EEDA Is focused on economic development, with little regard to the "other" sustainability factors e.g. social & environmental issues. EEDA will become the Regional Planning Body, and these issues must not be overlooked.

Resourcing

- LDF preparation is resource intensive – both staff and financially

Harlow

The most immediate barrier to delivering growth in and around Harlow is the lack of capacity in existing strategic infrastructure, most notably:

- Sewerage infrastructure, particularly treatment works
- Electricity distribution network
- Transport infrastructure (public transport and road as set out in the Transportation Board action plan – most notably the need for a new M11 junction and A414 link road)

Other challenges include:

- Improving the quality and vitality of the town centre and neighbourhood shopping centres
- Improving Harlow's image
- Raising aspirations, skills, and levels of entrepreneurship
- Ensuring quality of new homes and neighbourhoods, building on Harlow's tradition of cutting edge design
- Ensuring that growth benefits the existing town

Uttlesford

Issues:

Expansion of Stansted Airport which is seen as a major threat to the character of the District. The Council is opposed to a second runway at the airport but there is a national policy framework which supports the expansion of Stansted to a wide spaced two runway airport.
Pressure for residential development

Challenges:

- Overcome the fear of growth
- Need to work with community so that they accept that growth will lead to a high quality environment.
- Need to accommodate growth within the historical and rural context;
- Need to recognise that historic and rural environment cannot be replicated so need to plan quality places but which will have a different character.

4.3 The identification of priorities is an issue that will need to be taken forward, possibly through this piece of work in terms of ensuring that the needs of this part of Essex are made explicitly clear to regional and national government.

5 M11 Corridor: Other identified issues

5.1 Epping

- Pockets of 'hidden' deprivation and worklessness (working age and claiming one or more working age benefit e.g. Job Seekers Allowance). Four wards in Loughton, Waltham Abbey and Ongar are among the 10 most deprived in Essex
- Diverse area with high rates of out-commuting and 45% population living in commuter towns of Loughton, Buckhurst Hill and Chigwell close to the boundary with London
- 30% population living in market towns of Epping, Waltham Abbey and Chipping Ongar
- Largely rural with 94% land designated Green Belt
- NVQ 3+ 35.4% (Regional 43.4%). NVQ 4+ 19.6% (Regional 26%)

Healthcare & education issues

Health inequalities exist across Epping Forest, and some improvement in access to services is required. The inequalities are notable in relation to life expectancy which varies by 10 years for men across the district, smoking prevalence (between 22% and 27%) and obesity (there is a 10% difference across the district)

Mixed performance in secondary education - 3 experiencing periods of poor performance and special measures in recent years, 2 performing well and 1 achieving outstanding results

Primary schools generally perform well successful schools are oversubscribed and in the south of the District children from outside the District account for a large proportion of annual admissions. This is also the case with Epping Forest College, the local college of further education.

Harlow

Healthcare & education issues

Harlow's long term trend for academic attainment at Primary and Secondary school is a positive one. From Key Stage 2 to GCSE Harlow pupils are showing steady improvements. Moreover, there is evidence to suggest that schools which historically attained very low grades are now closing the gap on the highest attaining schools; this is especially true for Key Stage 2.

Harlow schools have shown significant improvement in GCSE results between 1995 and 2007. This is especially evident for pupils attaining 5 or more A*-C GCSE's which is now higher in Harlow than the average for Basildon, Stevenage, Essex, and the national average. Despite these headline improvements, results for pupils attaining 5 or more A*-C results *including English and Maths* (33%) are significantly lower than comparative areas.

Whilst there is a comparatively large and growing proportion of the working age population qualified to NVQ's 3 and 4 (degree level), the proportion of the working age population qualified to lower level qualifications 1 and 2, is significantly smaller than comparative areas.

"Harlow has a higher rate 'of working age adults with no qualifications' with 31.9% having no qualifications. More recent data from the ONS Annual Population Survey shows that the picture has improved although parts of Essex are still significantly behind both national and regional averages. In Harlow 19.9% of the working population have no qualifications compared to 14% nationally and regionally, and only 21.9% have a degree or higher qualification compared to over 25% nationally and regionally." (Harlow JSNA)

Within the Sub Region there are significant variations in health outcomes. Men in Harlow die ten years earlier than those in the nearby district of Uttlesford.

At 79 years, life expectancy in Harlow is below the Essex average but is higher than the national level. There are substantial differences between men (77.9 years) and women (82.9 years) and a five year gap between different localities in Harlow.

As in the rest of the country the most common causes of death in Harlow are coronary heart disease and cancers. Harlow has a high proportion of people with long term health problems, particularly people with respiratory diseases, and hospital admission rates are high. There is a strong relationship between levels of long term illness and of claims for incapacity benefit, with variations in both across different parts of Harlow. Harlow already has a higher prevalence of people suffering from mental health problems than the Essex average.

There are disparities in educational attainment and in progression into learning and employment between different sections of the population. This includes inequalities between different locations and also affects vulnerable groups such as looked after children. A higher proportion of young people with disabilities are also not in employment, education or training.

There are significant numbers of children and young people experiencing mental health problems (about 10% of 5 to 15 year olds). Among 15-year-olds in Essex, 55% drink alcohol, 19% are regular smokers and 13% use drugs.

Housing costs remain high although there are variations within the sub-region:

District	Av Price (All tenure) (£)	Av Gross annual Earnings	House price as multiple of annual average wage
Epping	£361,656	£29,848	12.12
Harlow	£179,079	£22,053	8.12
Uttlesford	£318,957	£31,283	10.2
Sept. 08			

The provision of affordable housing remains a key issue across the sub-region.

6 Delivery Mechanisms

6.1 The growth strategy for the District is set by the East of England Plan (EEP). This will be delivered via the Local Development Framework (LDF), in conjunction with the Sustainable Community Strategy.

6.2 Epping

Epping Forest District is within the London-Stansted-Cambridge-Peterborough growth corridor, and adjacent to Harlow which has been identified as a "Key Centre for Development & Change". The remainder of the district, away from the immediate environs of Harlow is within an area of general restraint. The fundamental principles of Green Belt policy must be adhered to.

The EEP stipulates that 3,500 new homes must be provided in Epping Forest District between 2001 and 2021. 16,000 new dwellings must be provided in Harlow, including urban extensions in Epping Forest and East Herts Districts.

The preparation of the LDF has been delayed pending the final approval of the EEP, and subsequently the arrangements that must be made to deliver the coordinated-joint working requirements of that Plan. Epping Forest, Harlow and East Herts Councils must deliver joint or coordinated Development Plan Documents to determine the location and scale of growth in and around Harlow. This must be informed by an "appraisal of planning & transport options", undertaken in partnership by the three District authorities, Essex and Hertfordshire County Councils, the Regional Assembly, the Government Office and Harlow Renaissance.

A number of technical studies are being carried out to inform other aspects of the LDF including:

- Strategic Flood Risk Assessment (SFRA)– Epping Forest, Harlow & East Herts District Councils, & Environment Agency. Level 1 Assessment almost complete, Level 2 Assessment will be required for site specific allocations that will arise from the preparation of the Core Strategy.
- Strategic Housing Market Assessment (SHMA) – Epping Forest, Harlow, East Herts, Brentwood, Broxbourne & Uttlesford Councils. Due for completion January 2009.
- Infrastructure Audit – Harlow DC. Remit broadened to include assessment junction 7 of the M11 (within EF District) & a strategic Green Belt review. Hertfordshire County Council undertaking similar infrastructure work across the whole of their County.
- Strategic Environmental Appraisal / Sustainability Appraisal (SEA/SA) – not yet commissioned but it is likely that the Scoping Report for this project will be undertaken across the three authority's areas.

In addition, it is proposed that the initial stages of preparation of the Sustainable Community Strategy will be aligned with the LDF. This will ensure that both documents are prepared in accordance with the same evidence, and are genuinely linked together.

6.3 Harlow

EFDC has engaged with The Greater Essex Prosperity Forum for example, in the production the Greater Essex Economic framework. Following the review of Sub regional Economic Partnerships, it is understood that GEPF will be abolished. There is instead support for a partnership based around the M11 corridor sub-region which would cover west Essex/ east Herts area. Epping Forest District initially supports this at officer level. Single partnership body to represent M11 Corridor sub-region? If not, then who would be best suited to represent?

The Programme of Development (POD) Partnership established to bid for, and spend, Growth Area Funds (GAF) includes seven local authorities: Harlow, Epping Forest, Uttlesford, East Herts and Broxbourne Districts; and Essex and Hertfordshire County Councils; as well as a range of other partners including Harlow Renaissance and a variety of 'green' partners. The Partnership is still not fully mature, and although it could provide a useful platform on which to build more sub-regional working, it as at present very clearly focused on delivering GAF projects.

Harlow Renaissance Ltd is a local delivery vehicle set up by Harlow District Council, Essex County Council, EEDA and English Partnerships. Its remit is currently to work on growth and regeneration within Harlow's borders; however it provides programme management services for the whole of the POD partnership.

The Harlow Stansted Gateway Transportation Board is a partnership between key councils, national agencies and the private sector, aimed at addressing transport challenges facing the Harlow-Stansted area. The Board is recognised in the East of England Plan as the key vehicle for developing and testing transport options for the sub-region. Essex, Herts, Epping Forest, East Herts and Harlow attend; Uttlesford do not, because of sensitivities about the proposed growth of Stansted Airport.

There are also a number of sub groups taking forward development of co-ordinated Local Development Frameworks between Harlow, Epping Forest and East Herts.

Early stage discussions have commenced with a view to the production of an Integrated Development Programme (IDP).

6.4 Uttlesford

- Programme of Development (Consortium of local authorities working together to use Growth Area Funding)
- Stansted Area Housing Partnership
- A consortium of local authorities and housing associations who are working together to deliver affordable housing.

6.5 Despite these individual arrangements there would appear to be an opportunity for the four districts within the sub-region to work together for mutual benefit, particularly in pursuit of Government funding to deliver infrastructure.

7 Future development potential and key economic and housing issues within the M11 Corridor

7.1 In view of the scale of growth planned for the M11 corridor, there is an urgent need to take stock of current economic circumstances and their impact on the aspirations for housing and jobs growth. Engagement with the relevant bodies, including the Homes and Communities agency will be essential, particularly in order to explore the role of the public sector in maintaining momentum for growth and delivering the necessary infrastructure requirements.

7.2 Whilst the purpose of this paper is not to pre-empt the review of the East of England Plan, which has only just begun, it is very likely that in the review period of the Plan (i.e. to 2031) growth at or above the proposed rates within the approved Plan is likely to be required within the M11 Corridor area.

7.3 The RSS is indicating further housing growth at Harlow North post 2021. The scale of additional housing beyond 2021 will be subject to the recommendations found by the green belt review. "The review to the north should provide for an eventual development of at least 10,000 dwellings and possibly significantly more - of a large enough scale to be a model of sustainable development. The review here should test the capacity to achieve the most sustainable size of urban extension in the longer term without the need for a further green belt review." (RSS)

7.4 Epping

Provision of affordable housing – both in urban and rural areas

Balancing the needs of an increased population against the desire to protect and conserve the predominantly rural nature of the District presents a major challenge.

Epping Forest, and ancient woodland area, is already the most polluted SSSI in the UK. Without careful planning at a local level and regional investment, the fragile eco-systems of the forest, which provide a green lung for the districts residents and others, will be placed at serious risk.

Implications of the growth of Stansted – if Stansted Airport increases in size, what demand will there be in this district to provide for housing/ job opportunities associated with this growth.

Harlow

The key barrier to delivering growth in and around Harlow is the lack of capacity in existing strategic infrastructure. The most notable areas of infrastructure constraint are:

Sewerage infrastructure, particularly treatment works

Electricity distribution network

Transport infrastructure (public transport and road – most notably the need for a new M11 junction and A414 bypass)

Impact of major development within the sub-region and its relationship with current settlements. Integration with the new settlement/major development to the North.

Needs of existing communities and tackling deprivation and skills deficit

Uttlesford

Expansion of Stansted Airport which is seen as a major threat to the character of Uttlesford District. The Council is opposed to a second runway at the airport but there is a national policy framework which supports the expansion of Stansted to a wide spaced two runway airport. Maintenance and extension of funding allocation to the area needed?

7.5 Where will additional job growth up to 2031 be located within the sub-region?

7.6 Future Actions:

TBA

7.7 Infrastructure projects

Epping

The growth of Harlow is dependent on a large number of infrastructure elements being provided. Some of these will fall entirely or partly within Epping Forest District, but there is little certainty at this stage of what exactly will be required.

Harlow

As part of the preparation of the Local Development Framework, studies have been commissioned to ascertain both Infrastructure and Employment Land needs. Both of these studies have yet to complete but will do so within the next three-to-four months which will enable a more extensive assessment of major infrastructure requirements/projects to be arrived at.

Infrastructure Projects

National Regional Local

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured	Shortfall
A414 bypass and new motorway junction	North and east of Harlow	Dft, Developers	c£300 - 400m	0	c£300 - 400m
improvements to J7 A414 to Southern Way	A414 - Southern way	Essex CC (CIF)	£9.75M	Provisionally allocated	
M11 Junction 7 improvements	Junction 7		TBD	TBD	TBD
Electricity Substation	Pinnacles	CLG, EEDA, GSK, EDF	c£6M	c£4M	c£2M
Town centre North redevelopment (mixed use, retail, leisure and residential)	Harlow Town Centre	HDC, ECC, EEDA, HCA, Developer	TBC	TBC	TBC
Rye Meads Sewage Treatment Plant (likely upgrade)					
Cosmetic improvements	Harlow Town Railway Station				
Redeveloopment of the wider train station area	Burnt Mill roundabout - Pearson Education - Riverbank				
Lee Valley - Tottenham Hale - Broxbourne, platform lengthening					

Uttlesford

- Improvements to Stansted Airport access from M11 and A120
- M11 widening
- Platform lengthening on Cambridge/Liverpool Street main line and four tracking between Broxbourne and Tottenham Hale

8 Appendices

1. The three district visions within the M11 Corridor

Epping

The Vision for the district over the period up to 2031 will be set by the Sustainable Community Strategy and the Local Development Framework. The preparation of both of these documents has been delayed by the late approval of the EEP, and therefore the Vision for the district has not yet been formulated.

There are some broad key drivers that can be identified at this stage, which will help in the preparation of the Vision:

- The district is currently characterised by a distinct settlements within countryside settings. This must be retained to ensure the character of the district is not irreparably damaged.
- There are a number of wildlife sites that are of international, national, regional and local importance which must be protected from harm.
- Whilst the Council recognises that the location of the district adjacent to London and Harlow and within a growth corridor will bring some necessary demand for growth, this must be delivered alongside improvements to existing and provision of new infrastructure. Growth must be properly managed.
- The provision of affordable housing is a key issue for the district and must be addressed.
- Retention and improvement of economic development opportunities, including the need for a strategy for the improvement of the existing employment areas.
- Consideration of the future of each of the town centres across the district.

Harlow

Harlow's Sustainable Community Strategy states the following vision for the town:

"A clean, safe, sustainable and healthy town with good educational prospects for its citizens, a variety of homes and jobs to meet local needs, and a range of sporting, leisure and cultural opportunities contributing to a higher quality of life."

The existing Harlow regeneration strategy includes six key themes:

- Economic prosperity
- Education, learning & skills
- Creating the conditions for growth and regeneration
- Homes, neighbourhoods and Quality of life
- Delivery mechanisms
- Stakeholder and community engagement

The review of the regeneration strategy is unlikely to substantially change these, but will provide greater clarity and precision, and is likely to also place more emphasis on:

- Raising aspirations
- Ensuring that development (particularly of urban extensions) takes place in the context of a single community for Harlow
- Taking forward some of the key principles of Gibberd's original masterplan
- Ensuring the town's residents have access to decent jobs, and the skills to do them.
- Ensuring that the town attracts inward investment and business growth, and improves the rate of business start ups.

Uttlesford

The Core Strategy should set out the spatial vision for Uttlesford. The following vision has been developed through consultation and forms the basis for the objectives and the policies and options for growth which follow.

By 2021…

- Uttlesford will enjoy a sustainably high quality of life in which the benefits of the unique character of the district are equally available to all residents, workers and visitors.
- Facilities will exist for companies to grow in Uttlesford
- There will be convenient, comfortable, safe and affordable alternatives to private transport, whether by bus or rail serving the settlements of Elsenham/Henham,
- Great Dunmow, Great Chesterford, Newport, Saffron Walden, Stansted Mountfitchet, Takeley and Thaxted and the regional interchange centre of Stansted Airport.
- A network of footpaths and cyclepaths will exist throughout the District
- The houses and facilities people need will be available and affordable locally
- New housing developments have been concentrated on relatively few sites to enable the provision of the maximum level of public service infrastructure.
- Our countryside, its habitats, agricultural, cultural and visual qualities will be protected and accessible to all
- The local distinctiveness and historic character of our towns and villages will be preserved and enhanced and they will continue to be separate entities with green space between them
- The district's high quality natural and historic environment and richness in biodiversity will have been maintained and environments requiring improvement will have been enhanced.

- The vitality and viability of our towns will have been maintained and enhanced and they will be safe, clean and attractive places.
- All development will be as close to carbon neutral as possible Water supplies and demand will have been managed to a sustainable balance
- The impact of Stansted Airport will have been minimised so that its presence is recognised as an asset to the district which attracts people to live, work and visit
- There will be accessible, high quality health services and effective promotion of healthy living will mean that healthy lifestyles are available to all.

Sub-Regional

The Programme of Development Partnership agreed the following vision for the wider sub-region:

The vision for the London-Harlow-Stansted corridor is to:

- Ensure that the delivery of new homes, infrastructure and economic growth play a major role in the regeneration of Harlow and the Lee Valley
- Ensure that development in the area meets the highest possible quality, sustainability and design standards, is supported by the necessary services and infrastructure, and is well integrated with existing communities
- Protect and enhance the rural character of the majority of the area and the character of smaller and historic towns
- Recognise the important role that historic buildings, conservation areas and other features can play in creating communities with a sense of place
- Make the most of existing, and create new, green infrastructure as a resource for local communities, and in particular promote cycling and walking for recreation and transport
- Use growth at Harlow, and its proximity to London, Stansted Airport, and Cambridge, to promote its role as a substantive sub-region centre and as a catalyst for a fundamental change in its image
- Establish Harlow as a key location for airport-related employment and housing, and as a university town
- Tackle the significant transport issues facing the area, particularly congestion at Harlow, by appropriate management of existing and provision of new infrastructure and by a major increase in the provision of facilities for and use of public transport, walking and cycling

2. The key objectives and priorities for the three districts

Epping
Key Objectives

The LDF and the Sustainable Community Strategy will provide the Key Objectives, and as above these have not yet been prepared. However, there are existing strategic principles in the Community Strategy (2004 – 2021) which give an indication of the areas that new objectives will cover:

- The organisations that make up the Local Strategic Partnership will work together, and with other bodies , to meet the sustainable development needs of the District.
- Modestly sized, distinct and separate towns in richly forested countryside, with historic monuments and rive valleys give the District its special character. Necessary change will be in keeping with and protect this unique charm.
- Having recognised the District's special character, it must nevertheless grow, with developments in housing, business and infrastructure being vital to long term prosperity
- Travel around the District, and transport links beyond, must be improved in a sustainable and accessible manner to enable everyone to benefit from community services, business opportunities and leisure activities.
- The conservation of resources, such as water and electricity, along with the management of waste and natural risks, like flooding, require careful planning in order to ensure the District's sufficiency and protection
- Whilst the business sector has a significant contribution to make, public bodies must remain responsible and committed to delivering high quality services that are accessible and timely
- The District's prosperity has serious implications, particularly for young people seeking homes and for the exclusion of the less well off. The provision of affordable housing and the importance of tackling areas of social deprivation must be recognised in promoting the prosperity of the District.

Key Priorities

The current LSP has a number of Action Groups which each has an Action Plan. Each of these contains a number of priorities and actions to be achieved and monitored. These Action Plans are currently under review.

Harlow

Harlow Council has set four strategic priorities. Achieving these will help make our vision a reality. To ensure that resources are directed to areas of highest priority, we have classified these priorities as top, high and medium. Anything else will be considered low priority.

Our strategic priorities are:

Top Priority: A clean, safe and sustainable environment.

High Priorities: A prosperous community.
Decent affordable homes.

Medium Priority: A caring community with a higher quality of life.

The refreshed regeneration strategy will be supported by a series of implementation plans targeted on particular neighbourhoods or on specific town-wide themes. The process of developing these is likely to begin early in 2009.

At a sub-regional level, the Programme of Development (POD) sets out five core objectives:

- **Unblocking** – infrastructure to facilitate growth
- **Enabling** – creating the economic conditions to deliver growth
- **Delivering** – housing growth
- **Regenerating** – to facilitate housing growth and address current under-performance and deprivation
- **Place-shaping –** including exemplar projects, sustainability and interventions to address the image of under-performing areas

The East of England Plan identifies the following priorities for the Sub-Region:

- Harlow is a key centre for development and change, one of 21 locations in the East of England at which development should be concentrated
- Districts in partnership to provide for a minimum of 45,100 new homes between 2001 and 2021, 16,000 of which to be located in and around Harlow
- Harlow and the Lee Valley is a priority area for regeneration, one of seven places in the East of England identified as having "significant areas of deprivation"
- A strategic review of the green belt around Harlow, involving East Herts and Epping Forest District Councils, is required.
- Epping Forest, Harlow and Uttlesford to contribute 56,000 new jobs in the 'rest of Essex' (along with Braintree, Brentwood, Chelmsford and Maldon); East Herts and Broxbourne to contribute to 68,000 new jobs in Hertfordshire.
- Harlow and the Lee Valley particularly identified as strategic employment sites should be located at Harlow and other nearby towns. Housing and development related to employment growth at the Airport should be located at Harlow and nearby towns.
- The London to Stansted corridor, including Harlow and access to Stansted Airport, identified as a Transport Investment Priority.

The Harlow Stansted Gateway Transportation Board Action Plan has the following themes:

- Evidence base & modelling
- Congestion busting
- Connections to the Strategic Road Network
- Bus Enhancements (Harlow Area Rapid Transit System (HART))
- Rail Enhancements
- Cycling & Walking
- Behavioural change
- Town Centre
- Parking

Uttlesford

The council has four priorities for 2007-09, which are supported by a number of key objectives:

Finance:

Effectively managing our finances and operating within budget

- Continually improving financial management and delivering value for money services
- Delivering effective and sustainable procurement

Partnership:

- Working to deliver effective and co-ordinated services with partners
- Actively seeking opportunities for delivering services in partnership and developing shared service provision
- Actively leading Uttlesford Futures, our local strategic partnership and contributing to the delivery of the local area agreement
- Working in partnership to improve the safety, health and well-being of our communities Improving access to sport, leisure and cultural activities

People:

Consulting and engaging with staff and customers

- Encouraging community participation through effective consultation and engagement
- Developing the customer service centre and improving access to services
- Maintaining a high level of corporate governance and standards
- Developing and maintaining a motivated and high performing workforce

Environment:

Protecting and enhancing the environment

- Opposing further expansion of Stansted Airport
- Managing development and delivering affordable housing for local people
- Developing sustainable communities by protecting and encouraging local facilities
- Developing energy efficiency policies to reduce our carbon footprint
- Improving environmental management and enforcement against environmental crime

3. M11 Corridor: housing growth targets

District	East of England Plan requirement 2001-2021	New homes per year 2001-2021*	Affordable housing target (%)	Affordable housing target (homes per year)
Epping	3,500	No regard to LAA target	No specific requirement for affordable housing at present, as above the SHMA is not due to report until January 2009. However, the last Housing Needs Survey (2003) identified that there was a need for 642 new affordable homes per annum to meet housing need. The EEP sets a target at a regional level, that 35% of all new housing should be affordable.	45
Harlow	16,000	400	Locally, current affordable housing allocation is set at 33% (Harlow Adopted Local Plan, March 07). This is lower than in neighbouring authorities.	156 (average)
Uttlesford	8,000	No regard to LAA target	Affordable Housing Requirement LAA2 - 350 units over 3 years 08/09 - 10/11 SHMA reporting in January 2009	117 (average)

***Based on current LAA target to 2011**

4 M11 Corridor: Housing market characteristics summary

Epping:

- Lack of affordable housing - high house prices given proximity and ease of access to central London
- Green Belt policy precludes a continuing long term housing supply and pressure on remaining employment land
- As set out in the East of England Plan the Council is required to provide 3,500 new houses within the district by 2021. Also an amount of Harlow's housing provision will encroach into the District
- There is a generally ageing population and demand for elderly persons accommodation in the private sector, although EFDC had experienced lack of demand for its own units
- (A Strategic Housing Market Assessment is currently being undertaken by EFDC, Harlow, East Herts, Brentwood, Broxbourne & Uttlesford Councils, and this will provide more information in the new year on the current housing market characteristics.)

Harlow:

The cost of Housing has risen significantly in recent years however Harlow still remains low cost compared to the region. The average cost of a house in Harlow is £185,100 (Hometrack, Aug 08). The average resident wage in Harlow is £23,109 which means that Harlow residents would need to raise 8 times the average wage in order to purchase a home. Harlow still retains a high proportion of social housing at 34.8% (Census 2001), and the demand for social housing has increased significantly from 2,200 persons on the housing register in 2002, to 4,100 in 2006. Private rented sector although having increased is still relatively small and costly.

Uttlesford:

The District of Uttlesford is comprised of

- the market towns of Saffron Walden, Great Dunmow
- the villages
- the countryside
- Stansted Airport
- The Market Towns

Saffron Walden and Great Dunmow, are the largest settlements in the District and offer a range of services. Saffron Walden acts as a hub for public bus transport, less so Great Dunmow. Audley End, the railway station for Saffron Walden is located 2 miles outside the town. Great Dunmow has no railway station. Both settlements have bus connections to Stansted Airport which is a regional interchange centre for bus, coach and train services. They provide secondary and primary schooling, retail, employment, leisure and health services. However many of the services, especially

the school and surgeries are at or nearing capacity. These towns are of the highest environmental quality, still retaining the medieval street pattern with pleasant shopping streets, open spaces and numerous historic buildings.

The rural area of Uttlesford has 7 key service centres which serve their rural hinterland. These are Elsenham, Great Chesterford, Hatfield Heath, Newport, Stansted Mountfitchet, Thaxted, and Takeley. Facilities in the key service centres are limited to basic shopping, GP services, primary education, pubs, public hall, and hourly or two hourly public bus transport to towns and the Regional Interchange Centre at Stansted Airport. Elsenham, Great Chesterford and Newport have railway stations. The key service centres serve a large number of smaller villages, hamlets and isolated houses. Some villages have a primary school, and most have a community hall and pub but generally, within this wider rural area there are minimal jobs, services and transport links. The villages contain a wealth of historic buildings, visually important open spaces and trees.

These attractive market towns and villages punctuate the gently rolling countryside, whose arable and pastoral mosaic is particularly well cared for.

5. M11 Corridor: employment growth targets

District	East of England Plan requirement 2001-2021	indicative forecast / target if known (to 2021)	Jobs delivered 2001 – 2006- (District Change in employee numbers)	Employment Rate Target (Working Age population)
Epping	Share of 56,000 jobs	3,090	7,608	>= 71.7%
Harlow	Share of 56,000 jobs	18,100	- 3,650	>= 86.2%
Utttlesford	Share of 56,000 jobs	9,050	1,566	>= 82.4%

*Annual Business Inquiry

6. M11 Corridor: employment market characteristics summary

Epping

- Seepage of skilled workforce to central London (According to the Census 2001 Epping Forest had the highest number of commuters into Greater London (26,159) of any local authority area outside the Capital - more than 20% of the District's entire population)
- Low unemployment rate (August 2008 Jobseeker's Allowance claimant rate of 1.7%)
- Major employers which have established and grown, or moved into the District include Higgins, Kier, Clinton Cards, Apollo London Ltd, Sainsbury's. Amstrad is to move to Loughton from Brentwood shortly. In addition, horticulture and farming and tourism and leisure are important sectors of employment

Harlow

Harlow's sector base employment is similar to other new Towns such as Basildon and there are contextually high proportions of persons employed within manufacturing and retail, distribution hotels and restaurants (see diagram).

In contrast to Harlow's high workplace wages, resident wages and incomes are relatively low and Harlow residents earn on average 25% less than Harlow workplace earners. This is compounded by traditionally low skills amongst Harlow adults with nearly one-fifth not having a qualification and only 51% holding an NVQ2 or higher.

Despite having contextually high numbers of economically active and employed Harlow also has a high proportion of unemployed persons (4.9%)[1] and work related benefit claimants (3.0%)[2].

39% of Harlow residents travel outside of the town to work. 27% of Harlow's workforce travels into the town to work.[3]

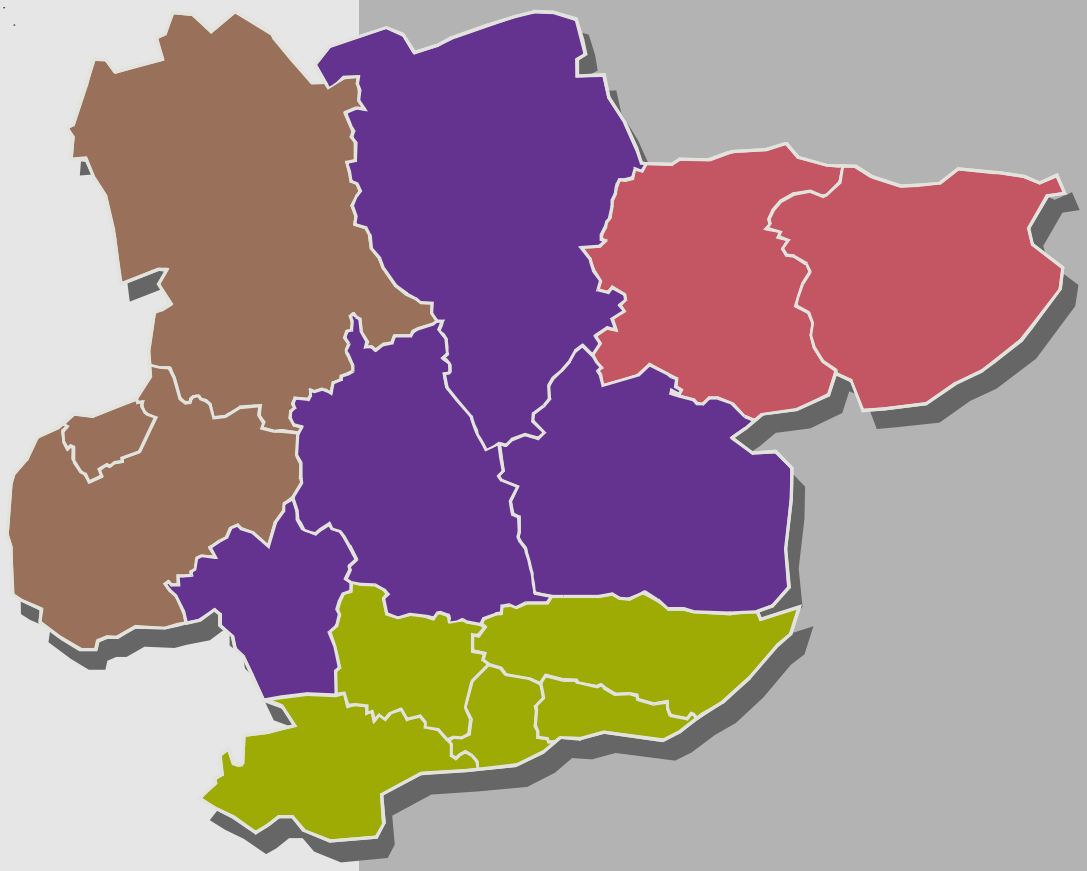
Uttlesford

Stansted Airport covers 955 ha. 11,600 people are employed on the airport. The airport also acts as a Regional Interchange Centre for bus/coach and rail. However the influence of Stansted Airport, economically and environmentally is much wider. The environmental effects are concentrated around the airport, but air noise affects a much wider area.

(Footnotes)
1 ONS, NOMIS 2008, Model Based Unemployment, Jan-Dec 2007
2 DWP, Job Seekers Allowance Claimant Rate, August 2008
3 Employment Land Study / Harlow Renaissance 2008

Strategic Countywide Economic & Housing Issues

Thames Gateway (South Essex) Position Paper



November 2008

(Updated July 2009)

Contents

1 Introduction

1.1 Thames Gateway South Essex (TGSE) is part of the wider Thames Gateway that includes North Kent and East London. It has been identified as the UK Government's top priority for regeneration and growth.

1.2 The TGSE sub region is made up of five local authorities: Basildon, Castle Point, Rochford, Southend-on-Sea and Thurrock.

Major economic strengths

1.3 The TGSE Economic Development Strategy establishes 5 key spatial drivers to take the regeneration of the sub region forward;

1. Shellhaven and Tilbury ports – creating world class logistics and distribution facilities;
2. Town centres and other smaller centres – building high quality places for new retail, leisure and office development in Basildon,
3. Southend and Grays, and more local services in Purfleet, Canvey Island and other smaller settlements.
4. The A127 Employment Corridor – for the growth of high tech manufacturing and light industry.
5. Lakeside Basin/West Thurrock – developing the retail and leisure Offer.
6. Southend Airport and additional business space – servicing companies in the sub region and supporting aviation related employment.

1.4 The Strategy also identifies the key challenges for the sub region to ensure these opportunities achieve local impact and creates local sustainable growth:

Productivity

1.5 The most commonly used indicator of economic competitiveness is Productivity. The productivity in the sub region scores below the national average (90 against GB=100) and this figure is of real concern to the sustainability and growth of the economy in TGSE.

1.6 However Basildon has the most productive economy of the TGSE local areas with A score of 110 - this raises the TGSE average significantly. Basildon ranks in the top 100 local areas nationally, mostly due to the high concentration of advanced manufacturing and engineering companies along the A127 Enterprise Corridor. Jobs at Ford's R&D Dunton centre, Visteon and

Selex are highly productive and well paid. This is not to say the Basildon economy is without its weaknesses. Many of these companies are foreign-owned and at significant risk to global shocks and competition from lower cost locations abroad. This is particularly relevant in today's economic climate, which poses a real threat to the stability of the local economy and to the retention not only of these global companies but also of their locally based suppliers. A good example is the recent job losses in Basildon, which exceeded 2,000 between April 2008 and May 2009.

1.7 Aside from Basildon, the productivity picture in South Essex is concerning; low levels of productivity exist in all the other TGSE areas relative to national levels. Southend on Sea has a lower productivity score of 79% which is a reflection of the commuting patterns. However the GVA per Capital in Southend has grown from 76% of the UK average in 1995 to 79% in 2005 indicating that (in comparative terms) it has grown more strongly than the UK albeit from a lower base.

High employment rates

1.8 Employment rates in South Essex are high compared to other parts of the country. TGSE has a high employment rate of 77% (residence-based), out performing the GB average of 74% and significantly above TG London (66%). Castle Point has the highest employment rate of 81% and Basildon the lowest of 75%. However examining the figures of those out of work, there are pockets of high worklessness in the most deprived neighbourhoods of Basildon and South Essex. Particularly there are a high proportion of people inactive due to long-term sickness and in Basildon a high number of young people not in employment, education and training.

Fewer jobs in knowledge-based industries

1.9 Successful economies are characterised by knowledge-intensive production and service sectors with rising levels of innovation, technology, creativity and entrepreneurship and a highly skilled and educated workforce. TGSE has a relatively weak knowledge economy with 20% of employment in knowledge-intensive sectors.

1.10 However Basildon, Southend-on-Sea and Rochford have more knowledge-intensive economies in which at least 20% of jobs are in knowledge-intensive sectors. In contrast, Thurrock and Castle Point have much less knowledge-intensive economies. It is worth recognising that due to the low levels of skills amongst local residents in South Essex (see below) it is unlikely that the majority of these knowledge-based jobs are filled by local residents. This is reflected in the fact that salaries for residents are lower than those of employees in the sub region indicating an in commute of skilled labour.

Few people skilled beyond level 2

1.11 Human capital is one of the most fundamental drivers of the knowledge economy. TGSE has relatively low levels of human capital. All 5 local areas in the sub-region scores below the national average.

1.12 In order to benefit from employment opportunities and economic growth, local residents must have the skills that are needed to compete in a modern labour market. Low skills are also a key factor driving worklessness and economic and social exclusion. Some 42% percent of TGSE residents do not have the entry level 2 qualification that is essential for their long-term employability. This compares with 35% of the working age population nationally. The proportion below level 2 is highest in Basildon with 48% in Basildon and only Rochford has fewer low-skilled residents than the national average (35%). In addition to this the sub region has relatively few residents with level 4 (degree or professional) or higher qualifications. Just 16% of the working age population has a level 4 qualification in TGSE. This is comparable to some of the most deprived local areas in Britain such as the Black Country, Barnsley and Sunderland.

Higher business birth rates but low survival rates

1.13 A dynamic local enterprise culture is vital for the long-term competitiveness and economic success of any economy. South Essex has a strong business formation rate (10.76), which exceeds the national average (10.08), particularly in Thurrock (11.80) and Basildon (11.91).

1.14 However, the sub region also has high business closure rates. Southend in particular has a very high business closure rate of 14 relative to the national score of 10.

1.15 However it is worth noting that a lot of the employment in Southend in particular, is seasonal nature and closures follow new start ups and create a natural churn. The opening of the University and town centre regeneration is having a positive effect on the local economy with modern premises attracting new business.

1.16 There is no clear forecast on the impact of the current tightening in credit markets or how long it will last. However should the economy go into a recession all sectors of the sub-region's economy could be affected from major multinationals to small businesses together with a be a corresponding rise in unemployment.

Existing housing market characteristics

1.17 There are 281,759 dwellings in the TGSE sub region; Southend-on-Sea (76,282) and Basildon (72,849) have the largest amount of total dwellings, together representing 53% of the housing stock in the TGSE area. Alternatively Rochford, with 12% has the least amount of dwellings.

1.18 The Thames Gateway South Essex sub region has above average private sector ownership at 85%. Three quarters of resident households are owner-occupiers. A below average affordable housing sector makes it difficult to meet housing need under current market conditions. Currently, there are 10,279 social sector and shared ownership properties in the housing market, which includes 8,701 general needs properties for rent.

1.19 TGSE household profile has slightly higher levels of single persons and married couples than the region as a whole. 29% of households are one-person, 30% families with dependent children, and 25% pensioner households.

1.20 Within the sub-regional housing market, different areas play different roles in providing housing choice. There are clear relationships between the three primary urban areas (Basildon, Thurrock and Southend) and the smaller settlements and rural areas. These provide a different housing and quality of place offer.

1.21 Southend is characterised as having more 1 and 2 bedroom flats and above average private rented sector, while Rochford has a number of larger 3 and 4 bedroom semi detached and detached houses, which tend to complement each other. Castle Point is in a similar situation with a pre-dominance of 2 and 3 bedroom dwellings. The housing offer in Thurrock and in Basildon New Town is skewed more towards 3 bedroom terraced properties with above average social rented sector. Across the sub-region, the trendy flatted and urban living offer that appeals to younger households is considered under-developed.

1.22 The TGSE sub regional housing market offers housing at a noticeable discount when compared to other parts of the greater South East region. This makes it attractive to households from outside of the area looking to upgrade; and to first-time buyers priced out of other housing markets (and particularly London). However, current market conditions have caused a slowdown in the market. In the short-term this is supporting demand in the private rented sector as prospective purchasers defer from buying.

1.23 The Housing Strategy / Strategic Housing Market Assessment identifies the following key challenges for successfully delivering sustainable regeneration in the sub region:

Total housing numbers / targets

1.24 In the short term, it is forecast that levels of housing delivery will fall due to the current housing market and associated "credit crunch", however, over the medium / long term, notable demand pressures are forecast for additional housing above the Regional Spatial Strategy target. Local authorities need to adopt a comprehensive and proactive approach to managing housing supply.

1.25 The key trend is an increase in single person households: over the twenty year period, the number of single person households is expected to increase by 47%. This compares to a projected 19% growth in all households; 6% growth in married or cohabiting couples; 10% growth in lone-parent households; and 13% growth in other multi-person households. We would expect a high proportion of the growth in single person households to result from more single persons aged 55 or over.

Improved housing mix

1.26 The challenge is to create a balanced housing market across Thames Gateway South Essex (TGSE) and at a neighbourhood level provide a choice of high-quality housing in sustainable, mixed communities.

1.27 For example, a key priority in Basildon is the delivery of the right balance of housing to meet future demands. Future housing provision must meet the demand for family accommodations,

executive homes and overcome the design problems of existing estates built in the 1960's in a manner that is affordable.

1.28 The former new town has the strongest concentrations of social housing in the South Essex sub-region. Two and three-bed terraced properties are over-represented, with 90% of typical urban areas having this dwelling type dominant. There is limited supply of more aspirational mid and upper market housing. This promotes high levels of in commuting to the District from across a wider travel to work area. Creating an improved housing mix offers to support improved live-work patterns is recognised as a key objective of future housing policy.

1.29 The sub regional Strategic Housing Market Assessment (SHMA) identifies that the majority of existing housing provision is of two and three-bedroom properties. It sets out that demand is predominantly for entry-level family housing to the south of the A127 with stronger demand for larger properties in areas with a high quality of place, particularly to the north of the A127. This should remain the mainstay of housing delivery in the sub-region. There is potential for the managed development of an urban living offer, particularly associated with flatted development in town centres, but this needs to be carefully phased.

Affordabillity

1.30 Affordability remains a significant barrier for young households wanting to get a step on the housing ladder. Entry-level house prices are approximately eight times the earnings of young households. Appropriate affordable housing policies including greater shared equity schemes will be important to provide a stepping-stone for local residents onto the housing market. Intervention is required to deliver more sustainable, mixed communities across the District.

1.31 A common target of 35% should be encouraged across the sub region, but needs to be subject to commercial viability testing. Local authorities need to work together to maximise the supply of new affordable housing utilising a range of policy tools.

Special needs housing

1.32 It is recommended that local authorities promote delivery of 'lifetime homes' through planning policies, and work to develop support services for older persons housing including advice services and provision of direct or financial support to help older households adapt housing to their changing needs.

1.33 There is clear demand across the sub-region for additional housing for older people, including additional extra care housing over the next twenty years. This is the case in each of the local authorities. Planning policies should also support provision of specialist and extra care housing across the sub-region.

Improving the Private Rented Sector

1.34 The increasingly important role of this sector needs to be recognised and developed through for example landlord accreditation schemes and support to vulnerable households by bringing homes up to decent dwelling standards.

Securing greener Homes

1.35 Opportunities exist for renewable energy, and low carbon schemes drawing experience from the Eco Homes initiative. Improving energy efficiency in existing homes also needs to be addressed.

Waiting Lists, Monitoring and Review

1.36 Local authorities need to work together, with affordable housing providers, to improve the quality and robustness of information on housing needs by developing a common waiting list for general needs and older persons housing (linked potentially to a sub regional Choice Based Lettings Scheme).

1.37 The market dynamics based on experience over the last five years indicates that the situation can change fast. A 'plan, monitor and manage' approach becomes particularly important in this context. A framework for monitoring change in the housing market is recommended.

Realising economic growth

1.38 To match housing provision in Thames Gateway South Essex to the identified economic opportunities in order to manage and reduce levels of in commuting.

1.39 In order for the economic aspirations of TGSE to be met, there is a need to ensure that the housing market can respond to economic change and demands of an increasingly prosperous population. The objective is for residents to progress through different types of housing offering them the maximum choice throughout their life. This in turn will attract the knowledge and financial service industries, and act as a favoured location for commuters would otherwise travel nto London. Homes are therefore required that meet the demands of workers in these sectors.

Social / economic deprivation

1.40 A number of estates exist in TGSE, particularly in the Basildon New Town, all sharing common problems relating to social exclusion, such as higher than average unemployment, poor health and poor educational attainment. They are poorly constructed with a layout and design that fails to meet today's standards for sustainable living.

Design and the environment

1.41 To support TGSE's economy and investment offer, and improve the sub regions image, by delivering an attractive housing offer and improved quality of place.

Supporting regeneration

1.42 Support the regeneration plans being developed by local regeneration partnership which includes housing renewal, town centre regeneration, better education and skills and improved environment and community infrastructure. Policies need to support plans for town centre regeneration including the emergence of an "urban living" market with a number of town centre flatted schemes under-construction or planned.

Impact of the credit crunch

1.43 A strong housing market, at the macro-level, has been supported by a sustained period of stability and growth in the national economy coupled with low interest rates in a historical context. However, recent quarters have shown the impact of interest rate rises in reducing housing demand and cooling house price inflation. Evidence points to first-time buyers currently holding off from buying property because of market uncertainty. The sudden surge in social housing could undermine attempts to create estates with a mix of social and private tenants which could in turn undermine the principle aim of creating sustainable communities. Local authorities are working closely with RSL partners and the HCA to mitigate this risk by for example seeking a switch from social rented to shared equity / market housing in the medium term depending on the state of the economy and the level of demand for different housing products.

Existing job market characteristics (see also economic strengths)

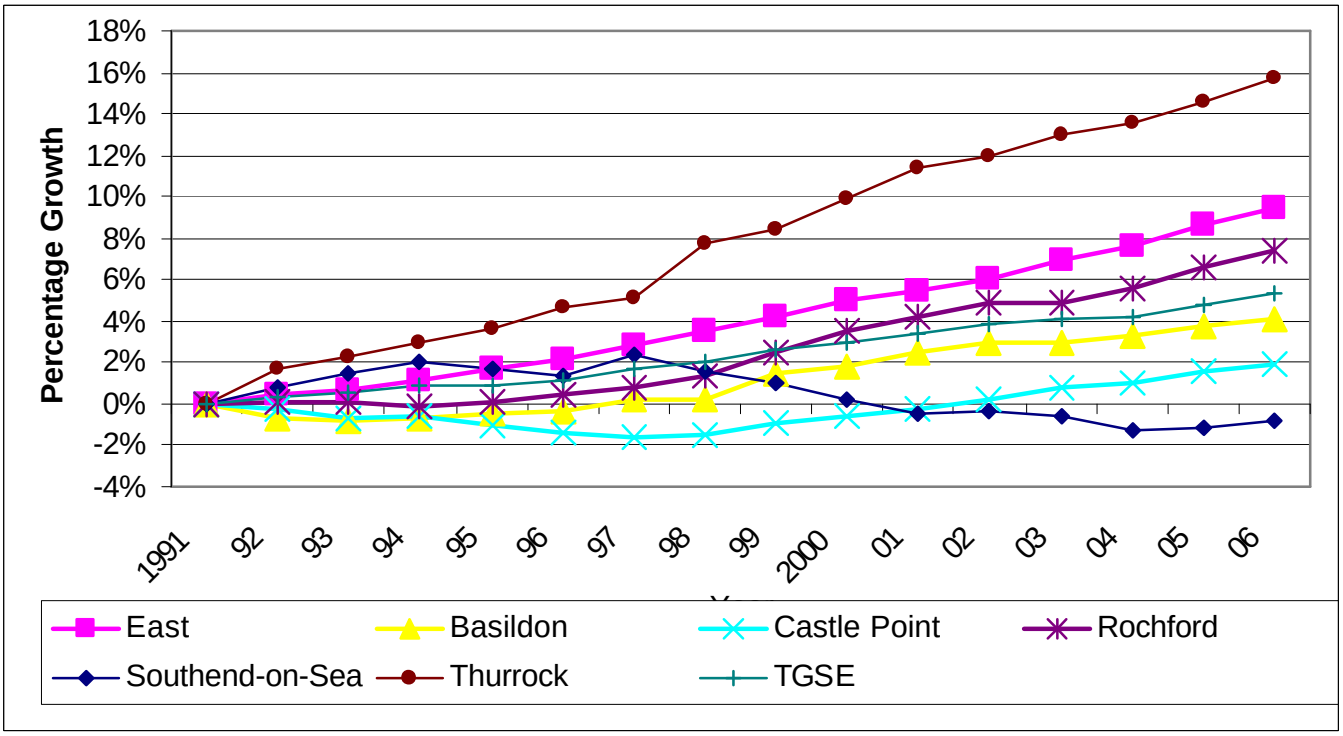
1.44 There are currently over 230,000 people employed in the Thames Gateway South Essex economy, with an ambitious target of 55,000 additional jobs to be created between 2001- 2021. Employment rates are high, but there is a significant amount of part time and low value work in sectors such as retail and distribution. Ensuring that the economy continues to grow and creates higher value jobs and prosperity for local people will help sustain a buoyant housing market.

Demographic issues

1.45 The sub region is diverse geographically, economically and socially, with combined population of 647,100 (mid year population estimates 2006), living in 281,759 dwellings. The sub region as a whole has experienced steady population growth with an increase of 12,950 since 2001, however this has been below average for the region.

1.46 Over the last fifteen years the sub region's population has grown by 5% compared to 9.5% regional growth. Household growth has been a consistent 10% per decade since 1981. Going forward, 8% household growth is expected per decade to 2026.

1.47 Population growth has resulted from a combination of natural growth (more births than deaths) and domestic migration, particularly from East London. Since 1999, net migration from East London to the TGSE housing market has averaged a considerable 7,825 per annum. The sub region has hence been fulfilling a key role in meeting demand from households looking to move out of London, supporting the London housing market which could in turn undermine the principle aim of creating sustainable communities.



Source: Mid-Year Population Estimates

1.48 The population structure is average across the sub regional housing market. It is not particularly ethnically diverse, although this is understood to be changing. The profile of households is similar but with slightly higher levels of single persons and married couples than the region as a whole. 29% of households are one person, 30% families with dependent children, and 25% pensioner households.

1.49 The age makeup of the combined Thames Gateway South Essex districts closely matches that of the rest of the region however, there are local variations.

1.50 In the period 1996 -2006 the Thames Gateway South Essex Districts have seen the older age cohorts (35-49, 50-64 and 65 and over) grow by around 12% in total, although this is much less than the national figure for these age groups which stands at 26%.

1.51 Although the total population has grown, certain age groups have actually reduced in size: both the pre-school (0-4) and young workers (20-34) age group have declined in both real terms and

as a percentage. This reflects the ageing population in the area (Figure 4.3). The 20-34 age group is particularly important, as it includes a high proportion of newly forming households.

Transportation issues

1.52 Infrastructure - around 55,000 people commute to London every day, but in return over 70,000 commute into the area to work. The economic sustainability of the area depends on an effective transport infrastructure, and the Thames Gateway South Essex Partnership has established a strategic board to ensure delivery of major schemes. A £63m programme to improve one key intersection at Sadlers Farm has received approval, and improvements to the major roads, linkage to the M25, and a new mass rapid transit system are all planned.

Health care and education issues

1.53 Health services - are also fundamental to supporting the development of healthy and sustainable communities. Health services are often seen as the hub of the community and vital to regeneration plans to readdress health inequalities and revitalise town centres, deprived neighbourhoods and the local economy.

1.54 As part of the TGSE Strategic Housing Market Assessment, GVA Grimley has reviewed Health Profiles produced for each of the local authorities in the sub-regional housing market area. This indicated that there are particular issues surrounding physical activity, above average levels of smoking and teenage pregnancy to be addressed.

1.55 The TGSE housing market has slightly higher levels of households with one or more people with a limiting long term illness (33.5%) than the rest of the region (30.8%) although roughly in line with England as a whole. District-wise Castle Point and Southend both have the highest levels of such households, which is consistent with a higher elderly population than other areas.

1.56 As part of the TGSE Strategic Housing Market Assessment, GVA Grimley commented that school performance is an important determinant in the locational decisions of family households. It can influence both migration trends and housing demand and be reflected in house prices. Southend has invested over £50m in a landmark campus for the University of Essex and South East Essex College in the heart of the town centre. This campus is now delivering results with a 40% increase in applications. There are plans for a further £100m+ of investment in schools and colleges across the area, with Building Schools for the Future and a Learning and Skills Council / Higher Education and Funding Council for England capital programme providing the basis for new schools, colleges and university places in Basildon, Thurrock and Castle Point.

2 Delivery mechanisms and partnerships

Sub Regional

Thames Gateway South Essex Partnership
Thames Gateway South Essex Inward Investment / Quality of Life / Education & Commissioning / Transportation Boards
Thames Gateway South Essex Housing Group

District / Local

Thurrock Thames Gateway Development Corporation
Basildon Renaissance Partnership
Southend Renaissance Limited

Essex LAA2
Thurrock LAA
Southend LAA

3 Current Growth and Infrastructure Requirements

Housing Growth

By 2021 an additional **44,300 homes** are planned for South Essex, with a 5% increase in the population.

Total Requirements

The target for Basildon is **10,700 homes**, Castle Point **4,000**, Rochford **4,600**, Southend **6,500**, Thurrock **18,500**

Affordable housing requirements

Current affordable housing policies vary between the local authorities across the sub-region. The current policy is as follows:

Basildon:

30% affordable housing on sites more than 10 units.

Castle Point:

currently 20% affordable housing on sites over 15 units. The Core Strategy should increase this to 30% when adopted.

Rochford:

35% on sites of 15 or more units

Southend:

requires 20% on developments of 10-49 dwellings and 30% on sites of over 50 dwellings.

Thurrock:

are currently trying to increase their affordable housing target to 35%.

Economic Growth

By 2021 an additional **55,000 net new jobs** are planned for South Essex.
The target for Basildon is **11,000 jobs,** Castle Point **2,000**, Rochford **3,000**, Southend **13,000**, Thurrock **26,000.**

Infrastructure Projects

National | Regional | Local

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured (Does not include other funding sought but not yet secured)	Shortfall
M25 Junction Widening	Junctions 26 - 31	Department of Transport			
Shellhaven					
South Essex Rapid Transport					
A13 / A130	Sadler's Farm Intersection				
A127 / A1159 Route Management and Major Maintenance					
C2C Line Capacity 12 car platforms					
A13 Passenger Transport Corridor					
Gardener's Lane south access improvements	A132 / A176 / A127 Basildon				
Surface access to London Southend airport / Station	Southend / Rochford	CLG and developer contributions	£21.4M		

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured (Does not include other funding sought but not yet secured)	Shortfall
Basildon					
Fryerns / Craylands regeneration access					
Southend					
Central Southend and Seafront Intigrated Regeneration Scheme	Southend Town Centre / Seafront		£15M		
Access to East Southend and Rochford	Southend North East and Rochford		To be determined in accordance with WebTag Guidance		
A127 Junction Improvements Borough Boundary to Town Centre	The following Junctions: Progress Road (CIF2 Bid); Bellhouse Lane; Kent Elms Corner; Somerton Avenue; Tesco Roundabout; Bell PH; Cuckoo Corner (committed 1a Scheme) Fairfax Drive; Blue Boar; Victoria Station		To be determined in accordance with WebTag Guidance		

Title	Location	Sources of Funding	Level of Funding Required	Level of Funding Secured (Does not include other funding sought but not yet secured)	Shortfall
Rochford					
Cherry Orchard Way upgrade					
Castle Point					
Roscommon Way Regeneration					

Note

Reference should also be made to the TGSE Integrated Development Programme.

To achieve regeneration success, it is vital that there is appropriate transport infrastructure to address current congestion problems (infrastructure deficit) and support growth both in terms of intra-urban movements across the sub region and within the KCDCs of Basildon, Southend and Thurrock.

4 Future Strategy

4.1 Thames Gateway South Essex Partnership

In the Vision for South Essex published in 2001, partners stated: "Our overriding aim is to provide an improved quality of life for all the people of South Essex, and to allow the area to participate, via the Thames Gateway initiative, in the prosperity of the wider South East and East of England."

4.2 Sub Regional Housing Strategy

Our Vision

"To deliver quality housing that contributes to sustainable communities and a balanced housing market."

4.3 Our Priorities

- Maximise Thames Gateway's number of key employment and residential sites to present an opportunity to create exemplar mixed communities.
- Ensure transport and social infrastructure is planned and focussed to open up new development sites to deliver housing growth.
- Maximise the housing development potential of the Thames riverfront, whilst enhancing its recreational use and protecting its bio-diversity.
- Encourage inward migration of skilled workers and enhance the skills of the wider workforce, ensuring that housing growth meets their diverse needs.
- Ensure Thames Gateway planned population growth benefits all residents not just newcomers by for example developing the local skills base to maximise take up of new jobs.
- Ensure programmes are in place to improve Community Safety and guarantee good housing management for the Gateway's housing stock both public and private.
- Ensure that addressing health inequalities is mainstreamed in the planning of infrastructure and through a design code for future developments.

4.4 These priorities are also within the Regional Housing Strategy to ensure the sub region and its objectives are aligned with the region. More recently an Integrated Development Programme has been prepared for the sub-region setting out the key capital infrastructure requirements for TGSE for the period to 2026. This will be a vitally important document that will, along with other supporting documents such as the Essex Issues Paper, provide the framework for the single conversation with the HCA.

Basildon District Council - Regeneration Framework

4.5 "Basildon already has a proud and positive community that will develop further as our regeneration plans move forward. Basildon people will be able to flourish in a rejuvenated District with the best access to education and skills, healthcare provision, leisure and cultural services and some of the best green and open space in the region."

Thurrock's Regeneration Framework

4.6 The Corporation's vision for Thurrock is to secure comprehensive and sustainable housing and economic growth, through the structured development and regeneration of the Borough for the benefit of new and existing communities and visitors to the area, with an emphasis on environmental quality and public realm. This vision is supported and being delivered in Thurrock by the Thames Gateway Development Corporation.

Renaissance Southend Limited Regeneration Framework for 2007-2021

4.7 SBC's regeneration partner Renaissance Southend Limited has produced its regeneration framework which identifies Southend-on-Sea as the regional centre, hub for higher education and culture, a centre for international air services in South Essex – a great place to live, do business and visit. As the biggest town in Essex, serving a population equivalent to a small midland city, the town's economy has the potential to expand and perform. Southend is the most urbanised Borough in the Eastern Region, and the recent development of the Southend Campus by South East Essex College of Art and Design and the University of Essex represents a significant chance for the town's next generation to achieve the skills and qualifications they will need locally.

4.8 The Regeneration Framework identifies six priorities to deliver sustainable regeneration and growth:

- Central Southend as a Regional Centre
- Developing London Southend Airport and A127 Industrial Corridor
- Regenerating Shoeburyness
- Enhancing Green Infrastructure
- Improving Transport Infrastructure
- Advancing Culture & Heritage

4.9 The Borough Council's Planning Policy Framework for the town as set out in the Adopted Core Strategy DPD underpins the Regeneration Framework as will a series of more detailed Area Action Plans being prepared for identified area of growth and regeneration in the town.

What are the key drivers and priorities that are shaping the TGSE Vision?

Key Local Policy Priorities

Basildon

- Improve the transport infrastructure, including road structure and public transport system.
- Increase the supply of housing (Basildon has the second largest housing targets for 2021 across the TGSE area); and improve the mix of housing locally to reduce out-commuting and support the economy. A key current priority is to increase the rate of housing delivery.
- Mixed use regeneration of Basildon Town Centre to deliver a range of higher quality sub-regional services and facilities. Deliver the Masterplans for Wickford and Pitsea Town Centres.
- Increase employment opportunities. Focus on developing urban business parks, specifically the A127 Enterprise Corridor.
- Develop a health and learning technology campus at Nethermayne Gateway. Invest in improving local schools.

Castle Point

- Improve road transport infrastructure, particularly access to Canvey Island. Member aspiration to deliver a third route off the Island. Deliver the extension to Roscommon Way.
- Increase the supply of housing through urban intensification and peripheral expansion. Improve the standards of housing.
- Improve the balance between housing and employment developments to reduce out-commuting, albeit that employment land take-up has not been strong. Aim to generate higher skilled and office based employment opportunities where possible.
- Increase the delivery of affordable housing to meet local needs (although there are competing infrastructure investment priorities to be considered). Aim to reduce use of temporary accommodation.
- Increasing the design and quality of housing.
- Providing supported housing for the elderly and disabled.
- Deliver the regeneration of town centres (masterplans being developed).

Rochford

- Spatial focus for housing development on the main towns of Rayleigh, Hockley and Rochford. Potential for a number of smaller sustainable urban extensions.

- Develop employment opportunities, particularly at London Southend Airport and surrounding area. Aim to diversify the economy away from manufacturing and industrial sectors and develop higher-value sectors, tourism and culture.

- Regenerate the town centres of Rochford, Hockley and Rayleigh (masterplans being developed).

- Local concerns on the impact of infill development on local character.

- Increase the amount of affordable housing to meet local needs.

- Review supported housing for Rochford's ageing population.

Southend

- Focused regeneration and growth in Southend Town Centre and Central Seafront and Shoeburyness. Deliver long-term sustainability of Shoebury through sensitive regeneration. Major physical change and renewal of Southend Town Centre.

- Develop employment opportunities and increase the number of jobs, particularly at Southend Airport and A127 Industrial Corridor and in the Town Centre. Aim to develop town centre office and residential offer.

- Expansion and development of education opportunities at the South Essex College and University of Essex Campus.

- Resist intensification in established suburban residential areas.

- Build a stronger cultural and creative sector.

- Increase visitor spend and the quality of the tourism sector.

- Aim to develop concept statements for future of Tower Blocks and delivery of regeneration in Housing Renewal Areas.

- Aspiration for Southend to develop as a cosmopolitan, multi-cultural place.

Thurrock

- Diversify the economy away from retail, logistics and the construction sectors and develop higher value commercial space. Develop environmental technologies and creative industries.
- Improve local skills and access to employment.
- Create a better balance between housing and employment.
- Improve transport infrastructure including extension and upgrading road and rail networks.
- Increase the mix and quality of housing.
- Increase the access to local service such as GPs and open space.
- Deliver the London Gateway proposals.

5. Issues and Challenges

Strengths

- Proximity to London and mainland Europe
- Proximity to Stansted (expanding)
- Access to major national road network (M25, M1 etc) evidenced by a strong warehousing and distribution sector in the west of the sub-region
- Proximity to retail centres of regional significance (Lakeside, Bluewater) and significant retail catchment
- Areas of high environmental quality (Rochford)
- Relatively low property prices residential and commercial when compared with the rest of the south east
- Presence of major container port (Tilbury) and related infrastructure (relative benefits to the industrial, manufacturing and distribution sector).

Weaknesses

- Proportionally little office stock due to historically weak demand
- Lack of development activity in the office market due to historically weak demand
- Poor retail environment in urban centres resulting in lower order occupiers and a drift to out of town parks
- Image and perception of the sub-region may hinder relocation of businesses
- Poor accessibility to the eastern part of the sub-region
- Aging population, particularly in the Eastern part of the TGSE
- Competitiveness is one of the key weaknesses of TGSE economy
- Lack of housing affordability across the sub region
- Shortage of high quality houses for sale in Basildon Town

Opportunities

- Potential for significant employment generating developments in Thurrock, Basildon, Castle Point and Southend / Rochford
- Improvements in infrastructure and passenger operators at airport are likely to have significant positive implications for local economic development and the economic development of the TGSE sub-region
- Potential to entice back-office functions related to activities in, or located in, central London
- Large amount of planned industrial space with planning permission
- Ability to maximising the high quality environment e.g. affordable live/work premises, the appeal of the riverfront and proximity to London
- High level of vacant space prime for redevelopment and re-branding
- Investment and improved links as part of the Thames Gateway
- Potential to exploit the environmental technologies sector which is seen as a global growth sector with a strong Thames Gateway brand
- Maximising the opportunities being offered through Stratford staging the 2012 Olympics
- Population growth and demographic changes are driving the housing market

Threats

- Competition from other employment centres in the south east, especially central London and Docklands
- Continued lack of investment in existing office accommodation that will consequently limit its appeal to new occupiers
- Possibility that London Gateway Shell Haven and other planned major developments fail to obtain planning permission or are subject to significant delays
- High levels of out-commuting (19%) – especially to central London.
- Current in-balance between residential labour and workforce
- Difficulty in raising the image of the sub-region as a business location due to historically negative stigma
- Pockets of persistent deprivation exist in the sub region
- Credit crunch and potential downturn in the economy with house prices having risen rapidly but not evenly across the sub region and now experiencing a downturn
- Growing numbers of people, including key workers and first time buyers, are unable to afford to buy a home within reasonable reach of where they work
- Aging population particularly in the 50-64 and 64+ cohort
- Older housing, both in the public and private sector, needs renewal through investment

The above information has been taken from the following sources:

- TGSE Strategic Housing Market Assessment (GVA Grimley, Sept 2008)
- Basildon Strategic Housing Review (GVA Grimley, 2007)
- Basildon Regeneration Framework (BDC, 2007)
- TGSE Economic Development Strategy (Shared Intelligence, 2007)