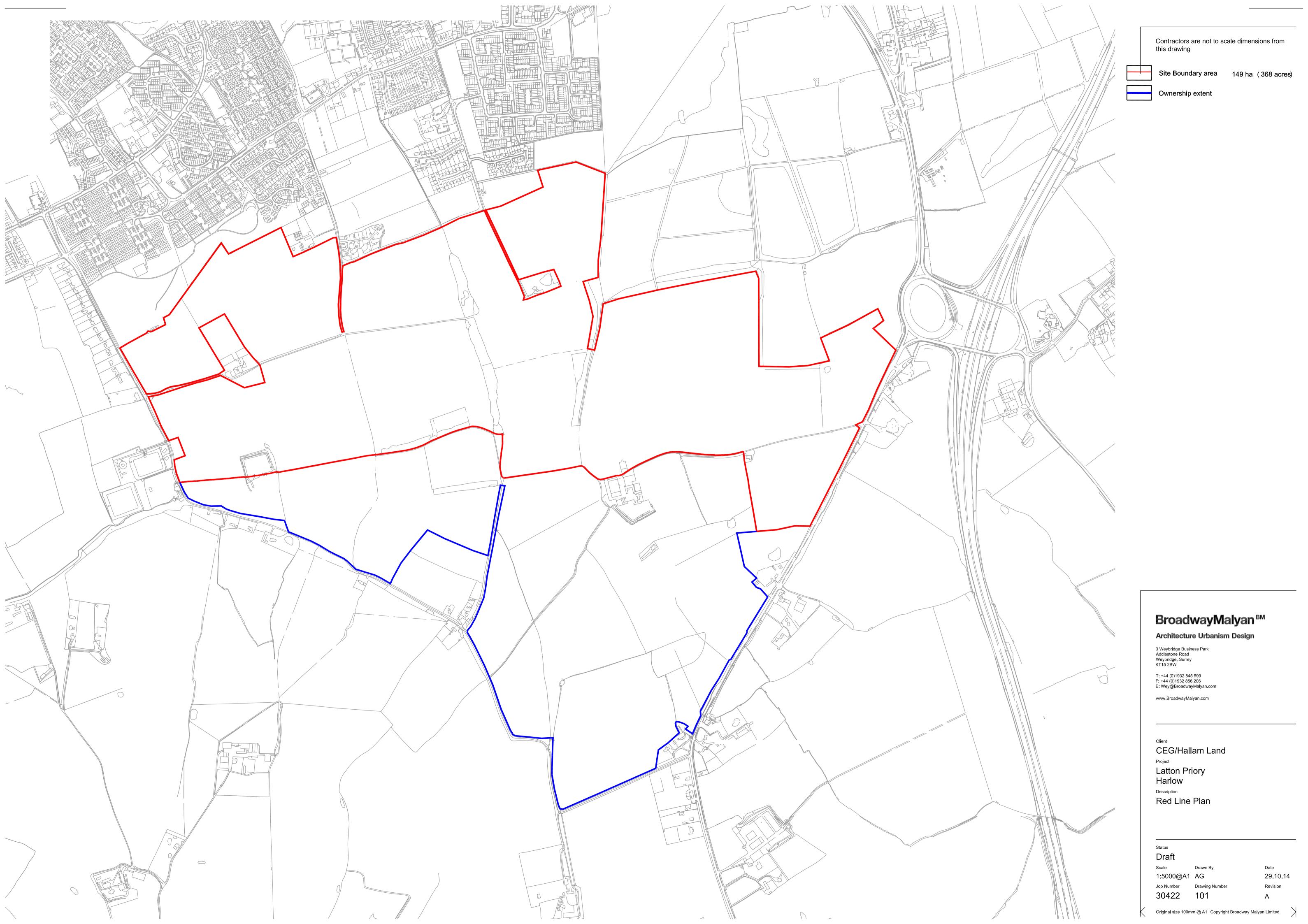
APPENDIX 1 – SITE LOCATION PLAN



APPENDIX 2 – TECHNICAL NOTE: TRANSPORT RESPONSE TO EPPING FOREST EVIDENCE BASE (BROOKSBANKS CONSULTING)

Land at Latton Priory Farm, Harlow

Technical Note: Transport response to Epping Forest evidence base

12th January 2018

1 Introduction

Brookbanks Consulting Limited (BCL) is appointed by Commercial Estate Group (CEG) and Hallam Land Management (HLM) to consider the transportation issues in relation to the future growth identified within Harlow of as part of the emerging Local Plan for Epping Forest District Council (EFDC).

National Planning Policy Framework paragraph 32 states "Development should only be prevented or refused on transport grounds where the residual cumulative impacts of development are severe." In support of the Latton Priory promotion, numerous studies have been carried out that demonstrate development at this location can proceed without having a severe impact and, therefore, should be supported from a transportation standpoint.

The purpose of this note is to review the evidence base that has been produced to support the development of the Epping Forest Local Plan with specific regard to the available highway capacity headroom that can be provided to deliver a garden suburb on the Latton Priory development.

2 Transport Evidence Base

In support of the Local Plan, numerous technical studies have been completed across different disciplines. The transport evidence base includes the Highway Assessment Report, dated December 2017 produced by Ringway/Jacobs. This report primarily aims to provide a review of the capacity headroom in Epping and contains additionally comments in the relation the capacity headroom in Harlow.

The Council noted at the meeting that 'the Garden Town could not take more houses because the capacity had already been maximised and the transport assessment for this Plan period demonstrated that no more growth in the Garden Town was possible'.

This sweeping statement is considered erroneous, there are several omissions within the Highway Assessment Report such that it cannot be used to justify the highway capacity position taken by the Council. These omissions are explored below.

The report uses the Epping Forest District VISUM traffic model to assess various forecast traffic scenarios. The model includes the key road networks within EFD with a particular focus on the Waltham Abbey, Loughton and Epping settlements. It should be noted that the outcomes of this report focus on the outputs of the principal EFD Highway Assessment Model and as such may simplify the impacts from external developments. Figure 2-2 demonstrates that the VISUM model does not include any junctions within Harlow, demonstrating that the modelling cannot be used to draw conclusions on the impact in Harlow.

The trip rates have been identified for different sustainability assumptions which assume different levels of modal split. The trip rates are generic and simplify the process, but the report does highlight that the projections are a worst case. It should also be noted that interactions / internalisation between proposed land uses has not been included. Therefore, the predicted trip generation is extremely robust and presents unrealistic growth projections and is contrary to the garden suburb philosophy.

The method used to predict the future background growth forecasts appear reasonable. However, the data has not been provided to validate the assumptions.

Trip distribution has been based on Census Journey to Work statistics which is reasonable, but the data has not been provided and therefore cannot be assessed.

This assessment did not include the strategic improvements, which includes amongst others J7 or the provision of J7a and the north/south sustainable link through Harlow that links to Latton Priory. This undermines the results as these strategic schemes has the potential to improve highway capacity significantly which could then alter trip assignment.

Table 3-1 indicates that by 2033 circa 12,000 new homes will be occupied, over and above current approvals. This assumes 750 occupations per year starting from 2018.

The report identifies a number of junctions in Epping will exceed capacity. This is not unexpected based on the robust nature of the assessment. The locations most effected should be reviewed in detail to determine what levels of mitigation are necessary, once realistic tests have been carried out that include internalisation and strategic mitigation.

The report then proceeds to discuss the potential impact on Harlow. The report highlights the location of potential allocations but does not provide clear descriptions on the development extents nor provide details on trip generation. As indicated, the report does not provide the distribution information to assess how development trips have been assigned. Latton Priory is located in a unique location, to benefit from tie strategic road network yet within closed proximity to Harlow town centre. An overly robust case may have been considered. Highway interventions have been considered, but not in a comprehensive way. There is scope to deliver a range of highway interventions that will mitigate the development impact.

The assessment of the impact relies on table 4-12, that only provides a review of speed limit changes. It is not clear if the proposals at J7a have been included. The speed limit changes are not significant and it is not possible to draw any conclusions from such a limited assessment. The delivery of highway interventions could mitigate the impact of the development. Through the assessments carried out by Brookbanks, we have demonstrated that there is scope to improve highway capacity within Harlow and, therefore, there remains clear opportunities to increase highway capacity headroom to facilitate development.

3 Summary

The transport evidence base which includes the Highway Assessment Report aims to provide a review of the capacity headroom in Epping and Harlow. It is considered that the report could be disingenuous due to several important failings, as summarised below.

The model includes the key road networks with a particular focus on the Waltham Abbey, Loughton and Epping settlements and Figure 2-2 demonstrates that the VISUM model does not include any junctions within Harlow: The lack of model coverage within Harlow undermines any of the Harlow conclusions.

The trip rates used in the assessment are generic: The use of generic trip rates will over estimate the likely trip generation and does not take account of the specific development characteristics.

Interactions / internalisation between proposed land uses has not been included: Therefore, the projections are unrealistic / overly robust and is contrary to the garden suburb philosophy, which identifies that daily demands are addressed within the development which reduces external trip generation.

Trip distribution has been based on Census Journey to Work statistics, but the data has not been provided and, therefore, cannot be assessed: The distribution of trips intrinsically identifies the direction of travel, without assessing this data there is little opportunity to assess whether the development trips have been assigned in compliance with the development aspiration's.

This assessment did not include the strategic highway improvements, which includes amongst others J7 or the provision of J7a as identified paragraph 3.9.8: This undermines the conclusion that results ass these strategic schemes has the potential to improve highway capacity significantly.

To conclude, there are several areas of the transport evidence that present an unrealistically robust picture of capacity, and as such, cannot be used to support the development of the Local Plan.

APPENDIX 3 – THE ECONOMIC MCASE FOR LATTON PRIORY (REGENERIS LTD)



Commercial Estates Group and Hallam Land Management

The Economic Case for Latton Priory

September 2013

Regeneris Consulting Ltd

www.regeneris.co.uk

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Executive Summary

- 1. Commercial Estates Group and Hallam Land Management are promoting land at Latton Priory Farm located in the Epping Forest district for a mixed use development. The 600 acre site, which falls within the Green Belt, has the potential to deliver up to 2,500 homes and 12-15ha employment land.
- 2. Regeneris Consulting has been commissioned by Commercial Estates Group (CEG) and Hallam Land Management (HLM) to prepare a report which sets out the economic case for the Latton Priory site in the wider context of employment needs for the district as part of the local plan process. This document will inform discussions with Epping Forest District Council about the future role and potential economic needs for the district and the site, which can inform the direction of planning policy for the district.
- 3. The site will result in numerous benefits for the local area, primarily related to the *scale* and *location* of the potential development.
- 4. This paper focuses on those benefits for Epping Forest. Delivery of Latton Priory will also lead to benefits elsewhere, particularly Harlow. A separate paper will be produced focusing on those benefits for the town.

Local Issues and Opportunities

Issues

- Some reliance on a narrow sector base associated with lower value sectors. Employment in Epping Forest is driven by its population, with significant concentrations of jobs in sectors serving the local residents such as public administration (including health and education), retail, food services and entertainment/recreation. Growth has been experienced in some of these areas in recent years (in particular education and entertainment/recreation) suggesting a reliance on these sectors. This has been coupled with a decline in higher value sectors such as professional, scientific and technical activities and construction. Offering more higher value employment opportunities may help to retain some of the workforce in light of high net out-commuting.
- Uncertainty around housing and employment growth levels. The Issues and Options paper is the latest published documentation on the proposed level of housing and employment growth for the District. The projections underpinning these targets are now out of date. Analysis commissioned by CEG/HLM indicates that more recent housing projections show much higher levels of growth and our own analysis of employment forecasts suggests that the growth potential of the area may be significantly higher.
- Historically, a clear economic vision to support growth sectors has been lacking. There are currently no key documents setting out the aims for the economy of the District or its priority sectors. While Epping Forest is covered in wider strategies and visions, for example of the South East LEP, it is not clear as to the exact role which the area will play in their delivery and achievement. However, it is recognised that the council is addressing this issue.

- A growing and ageing population. Epping Forest's population increased by 3% in the 10 years to 2011. Although this was considerably lower than the growth seen nationally (+8%), growth in the proportion aged 65 and over in the District was in line with that seen nationally. The 2011-based SNPP forecast that by 2021 Epping Forest's population will grow at a faster rate (+12%) than nationally (+9%). The population over 65 years of age will grow at a faster rate than the working age population leading to an increased dependency ratio.
- **Out-commuting and workforce polarisation.** Epping Forest is a daily net exporter of labour with the majority of people travelling out of the District to London for employment. Resident earnings for people living in Epping Forest are generally higher than workplace-based earnings, and are considerably higher than the national and regional averages. This suggests that there is a requirement to provide employment which can retain the local workforce.
- Decline of town centres and closure of shops and services. There has been some decline in local town centres in Epping Forest as well as Harlow in recent years as a result of leakage of expenditure and a lack of critical mass to support shops and services. The Issues and Options paper acknowledges that Waltham Abbey in particular has struggled to maintain its vitality and viability while Loughton, Debden and Epping have all fallen in the national ranking since 2000. Development potential in Epping and Debden has been identified though there will need to be a critical mass to ensure a threshold of visitors to prompt development.

Opportunities

- **Strong economic growth.** Epping Forest District experienced strong economic growth between 2001 and 2011. In 2011, the District contributed £2.1 billion to the UK economy, increasing its output by 67% compared to 47% regionally, and 48% nationally. The District also performed strongly in terms of economic growth (+19%) between 2001 and 2011. Between 2008 and 2011, employment in Epping Forest grew by 2% compared to a decline of 3% at the Essex and East of England levels.
- Key Sectors Reflecting Proximity to London and Resident's Needs. Administrative and support service activities, and wholesale and retail trade are two of the largest employment sectors within the District employing 16% of the workforce respectively. The former has a high degree of specialisation compared to elsewhere while the latter exhibits a concentration that is almost twice that seen nationally.
- An enterprising district. Epping Forest is an enterprising District, with an average of 53 businesses per 1,000 residents, compared to 43 businesses per 1,000 residents regionally and 41 businesses per 1,000 residents nationally. Net business growth in Epping Forest is in line with that seen nationally, and is considerably lower than prior to the credit crunch. Business survival rates in Epping Forest are lower than those seen elsewhere, especially long-term survival rates for businesses registered in 2006 and 2007.
- **High rates of economic activity and employment.** The District has a high economic activity rate (82%) with a high employment rate (79%) and low unemployment (5%) when compared to regional and national comparators.



• **Strong labour market links to London.** The strong labour links to London support high skills and earnings locally. On average residents in Epping Forest are generally more skilled than residents elsewhere (52% with NVQ 1-3 in the District compared to 47% nationally).

Benefits of housing and employment growth at Latton Priory

Realising the Benefits of Housing and Employment Growth within Epping Forest through Delivery of Latton Priory

In summary, Latton Priory can:

Employment

- Deliver all of the employment land required in the District to meet employment growth as identified in the Issues and Options paper (up to 15ha can be provided compared to 8.7ha required)
- Fulfil approximately 55% of the jobs growth target identified in the Issues and Options paper through direct on site jobs (approximately 2,170 Full Time Equivalent positions in B class uses as well as jobs in retail and services within a local service centre)
- Provide local employment opportunities which may mitigate the high level of out-commuting and diversify the employment offer of the District (with the potential to increase higher value activities in the area)
- Provide a sufficient scale of employment land to:
 - deliver the necessary hectares required for a range of business types from office to food production
 - enable business clusters (in any sector) as recommended in the ELR
 - meet business expansion needs, both of the 40% of medium and larger businesses in the District requiring move on space as well as to meet the needs as those located at Latton Priory grow
- Offer direct access to the M11, which is ideal for B1c, B2 and B8 businesses

Housing

- Deliver between 22 and 32% of the District's housing target as identified in the Issues and Options paper
- Help the Council deliver against its 'duty to cooperate', especially with Harlow
- Provide affordable, intermediate and market housing in an area of identified need
- Provide a development of a sufficient scale to ensure sustainability through provision of jobs, homes, shops and services
- Support viability of local shops and services in the surrounding area through injection of additional resident spend and the necessary critical mass
- Strengthen the local labour force through a new population, which in turn can support local businesses as well as attract inward investment

Infrastructure

- Deliver a new junction (Junction 7a) on the M11 thereby improving the local traffic network
- Provide new shops and services to meet the needs of the local population, including new primary schools
- Provide £26.5 million in New Homes Bonus Payments and £4.1 million per annum in Council Tax payments
- Generate approximately £2.0 million in business rate revenue per annum for the local authority.



Supporting Employment Growth

- Creating jobs to ensure Epping Forest is an important player in the sub-regional economy. The South East LEP provides a clear focus on prioritising economic growth, reflecting national priorities. The Greater Essex Integrated County Strategy (2010) and the Essex Economic Growth Strategy (2012) similarly have aspirations for significant economic growth, economic vibrancy and entrepreneurialism. The District performs well against a number of key economic indicators though also demonstrates areas in which comparator locations have a greater competitive edge. Other locations are adopting proactive responses to develop their economies and there is a real danger that Epping Forest will get left behind. Development at Latton Priory will help to drive the economy forwards in the absence of a clear vision for economic growth for the District¹.
- Helping the District to achieve its economic potential. The Issues and Options paper identifies a target of between 3,900 and 4,000 jobs over the Plan Period, though the latest government projections indicate that the potential could be much higher, closer to 8,400 jobs. There will be a number of jobs made available in the District as a direct consequence of the development:
 - > 70 temporary construction jobs per year on average or 142 permanent direct Full Time Equivalent (FTE) jobs over a 20 year build period.
 - 2,440 direct jobs provided on site or 2,170 direct FTE jobs. These positions will be dependent on the final employment uses developed on site but are likely to include a range of occupations (including managerial and professional as well as lower skilled occupations) within a number of sectors (for example business and professional services as well as retail and public sector, such as education).
 - An additional 435 indirect FTE jobs through multiplier effects in the local area. These positions will in part be dependent on the employment uses provided on site as this will inform supply chains.
 - Further jobs supported through spend in local shops and services in the District (estimated to be approximately £19.6 million). Typically these jobs will be those in retail, service industries (such as restaurants and hair dressers) as well as in public sector services (such as health and education).
- Responding to local need. The jobs available on site as a direct consequence of the scheme, as well as those supported indirectly, will provide important employment opportunities for local residents. The construction sector lost a number of jobs in recent years and the development of the scheme will provide opportunities for those in this sector. Health and social work, which also lost jobs recently, will also be supported through resident demand. In July 2013 there were 2,000 residents

¹ A vision may become apparent on the publication of the forthcoming Economic Development Strategy



claiming Job Seekers Allowance in Epping Forest. The most common occupations sought were sales; administrative positions; elementary trades; and corporate managers. Positions such as these will be provided through the scheme as referenced above.

- Diversifying the local economy. Employment opportunities created at Latton Priory
 will be important in reducing reliance on certain sections of the economy,
 particularly those of lower value (such as the public and service sectors), and
 supporting those of higher added value (such as professional and business services
 and high tech businesses). In particular Epping Forest's business base plays an
 important role in responding to the London business market, through provision of
 services and this could be supported to grow.
- Supporting employment growth in key sectors. The exact employment uses intended for the Latton Priory site have not been agreed, providing the opportunity for the site to contribute to those sectors identified as particularly important for the area:

Sector Priorities for Essex and the South East LEP Area					
	SE LEP Vision	Essex Economic Growth Strategy	Comments		
Advanced manufacturing	•	•	Growth in recent years while R&D is forecast to grow by 72% (100 jobs) between 2011-2031. Potential to link to strengths in technology around Harlow EZ and London-Stansted-Cambridge corridor		
Environmental technologies	•	•	Large scale of Latton Priory may make such uses viable, potentially linked to advanced manufacturing.		
Offshore wind and renewable energy	•	•	Large scale of Latton Priory may make such uses viable, potentially linked to advanced manufacturing.		
Agriculture and food processing	•		Forecast job losses in the District (-300 jobs in agriculture though static in food manufacturing) and so there is both a need and an opportunity to support EFDC in delivery of tri-borough aims in food production.		
Transport and Logistics	•	•	Degree of specialisation in the District and projected to grow over next 20 years (700 jobs, +23%). The site offers prime access to M11.		
Financial and business services	•		Professional and business services are in top 3 growth sectors (1,100 and 3,200 jobs respectively). ELR recognises this will create main requirement for employment land (office).		
Tourism and creative industry	•		Arts, entertainment and recreation employment increased by 45% in District since 2008 and is forecast growth of 900 jobs over the Plan period. Potential to provide workshop units though tourism activity will be predominantly town centre focused.		
Health and care		•	Ageing population will create demand in this sector including both office based employment and client-facing care.		

• Reducing out-commuting. Epping Forest is a daily exporter of labour, with London being the primary recipient. The salaries of those commuting out for work are therefore around 20% higher than earnings of those who work in Epping Forest. Providing higher value jobs will help to retain those with higher skills in the District for employment. By providing both jobs and homes, Latton Priory will encourage

limited commuting of its residents.

- **Supporting business expansion**. The ELR (2010) identified that 40% of businesses are looking for premises for expansion. Providing these businesses with suitable premises within the District will present losing them through relocation elsewhere.
- Supporting enterprise. Epping Forest has a high rate of self-employment and business start-up, coupled with a high rate of home working, particularly in the professional and business services sectors, both of which are forecast considerable growth. There could be an opportunity to provide hot-desking and small office space to meet the needs of these businesses, possibly through a live-work or incubation model, linked to business support to respond to the above average business failure rate.

Supporting Housing Growth

- Supporting planning policy and meeting the aspirations of the emerging Local Plan. There is a clear need to deliver more homes within Epping Forest to meet the needs of the growing population. One of the aims for the Local Plan is 'to deliver the right number of houses in the right places'. The Issues and Options paper identifies that between 7,700 and 11,400 new homes will be required between 2011/12 and 2032/33. Based on more recent population projections this requirement may now be closer to 16,000. Latton Priory has the potential to deliver up to 2,500 homes (between 22 and 32% of the target range) which could help to support these aspirations.
- Assisting Epping Forest DC in responding to the 'duty to cooperate' identified in the National Planning Policy Framework (NPPF). The Issues and Options paper and the related evidence base suggests between 3,000 and 6,400 homes may be required to meet this duty. Latton Priory is ideally placed to absorb some of Harlow's demand.
- Meeting the Need of Local Households. An above average proportion of households in the area around Latton Priory are unsuitably housed and there is an identified a need for affordable and intermediate housing in rural areas. The site will provide a mix of affordable, intermediate and market properties of varying sizes to help meet the needs of the current and growing population.
- Attracting and retaining a working age population. Over the next two decades, Epping Forest is projected to experience significant growth amongst older age groups. New homes play an important role in helping to attract and retain residents of working age which are vital in helping to: enhance the labour pool through a greater volume and scope of skills available to attract inward investment which in turn provides additional employment; retain and grow spending in the local area thereby supporting more local shops and services; and providing the threshold needed to sustain local services such as shops and schools.
- Supporting growth of town centres. The NPPF promotes retention of community facilities, shops and services which are of value to the local residents. A number of shops and services in Epping Forest and Harlow have closed due to lack of spend and



demand. The development at Latton Priory will contribute up to an estimated £19.6 million gross expenditure per annum on everyday goods and services in the District. Harlow will likewise benefit from increased expenditure. This will help to support existing shops and services locally and will also contribute to the threshold required to prompt market delivery of better quality shops and independent stores which was identified as a desire within the Town Centres Strategy. This is particularly the case given that new private sector homes attract residents in middle and higher socio-economic groups.

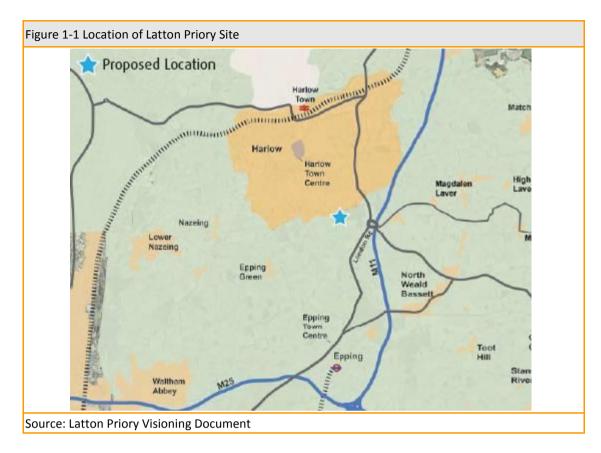
• Supporting delivery of infrastructure. The development of the Latton Priory scheme will directly deliver a new junction (Junction 7a) on the M11, helping to ease congestion in the local area and enhancing the traffic network. The scheme will also indirectly support other infrastructure development via fiscal impacts such as the New Homes Bonus, Section 106 or Community Infrastructure Levy which will increase the funds available to the Council for the implementation of the forthcoming Infrastructure Delivery Plan.

1. Introduction

- 1.1 Regeneris Consulting has been commissioned by Commercial Estates Group (CEG) and Hallam Land Management (HLM) to prepare a report which sets out the economic case for land at Latton Priory..
- 1.1 As part of the process for development a new Local Plan, Epping Forest District Council published an Issues and Options paper (2012) for an 11 week consultation in July 2012. It is anticipated that the council will publish a preferred options paper in January 2014.
- 1.2 This document will inform discussions with Epping Forest District Council about the future role and potential of the Latton Priory site, and inform the direction of planning policy for the district. The specific objectives of this assignment are:
 - 1). Provide a strong understanding of the issues and opportunities locally;
 - 2). Assist CEG and HLM to develop an understanding of how Latton Priory can support economic objectives for the area e.g. supporting growth and developing key sectors; and,
 - 3). Inform discussions with Epping Forest DC about 1. and 2. which can help CEG and HLM to provide a more detailed strategy for the site which is aligned to local needs (additional areas of work are identified at the end of this document).
- 1.3 This paper focuses on those benefits for Epping Forest. Delivery of Latton Priory will also lead to benefits elsewhere, particularly Harlow. A separate paper will be produced focusing on those benefits for the town.

Latton Priory Site

- 1.2 Commercial Estates Group (CEG) and Hallam Land Management Ltd (HLM) are promoting land around Latton Priory Farm to the south of Harlow for a mixed use development. The site is located along the northern boundary of Epping Forest DC and southern edge of Harlow, and would form an extension to Harlow.
- 1.3 The location of the site is illustrated below and this shows that the site is well accessed to the local road network and M11 through junction 7. CEG and HLM are also committed to supporting the implementation of junction 7A which would improve transport links even further.



- 1.4 The 600 acre site which is located in the greenbelt has the potential to deliver up to 2,500 homes and 12-15ha employment land. Development of employment uses will be market led with the potential to also respond directly to Council aspirations for sector growth. It will consist of B class uses, with the exact mix still to be determined.
- 1.5 The site has been identified within an Issues and Options Paper for the Epping Forest District Council Local Plan (July 2012) as having the potential to support the growth of Harlow:
 - HAR C the Latton Priory site is identified as having the potential to provide 400-800 homes on the site (below the actual capacity identified by CEG/HLM).
 - HAR D the Latton Priory site is identified as a Gateway site to Harlow with around
 7ha of employment land.

Report Structure

- 1.6 The remainder of the report is set out according to the following structure:
 - Chapter 2 sets out the local issues and opportunities based on the current characteristics of the area using local indicators and policy. Further policy detail is contained within the Appendix.
 - Chapter 3 explores the potential for future growth in Epping Forest in terms of employment and housing, drawing primarily on Core Strategy documents published by the Council.

- Chapter 4 details the benefits of employment and housing growth at Latton Priory for Epping Forest.
- Chapter 5 summarises our conclusions and sets out next steps in progressing discussions with the council.

2. Local Issues and Opportunities

Summary

- Epping Forest District experienced strong economic growth between 2001 and 2011. In 2011, the
 District contributed £2.1 billion to the UK economy, increasing its output by 67% compared to
 47% regionally, and 48% nationally. The District also performed strongly in terms of economic
 growth (+19%) between 2001 and 2011. Between 2008 and 2011, employment in Epping Forest
 grew by 2% compared to a decline of 3% at the Essex and East of England levels.
- Administrative and support service activities, and wholesale and retail trade are two of the largest employment sectors within the District employing 16% of the workforce respectively. The latter exhibits a concentration that is almost twice that seen nationally.
- Epping Forest is an enterprising District, with an average of 53 businesses per 1,000 residents, compared to 43 businesses per 1,000 residents regionally and 41 businesses per 1,000 residents nationally. Net business growth in Epping Forest is in line with that seen nationally, and is considerably lower than prior to the credit crunch.
- Business survival rates in Epping Forest are lower than those seen elsewhere, especially longterm survival rates for businesses registered in 2006 and 2007.
- Epping Forest's population increased by 3% in the 10 years to 2011. Although this was considerably lower than the growth seen nationally (+8%), growth in the proportion aged 65 and over in the District was in line with that seen nationally. The 2011-based SNPP forecast that by 2021 Epping Forest's population will grow at a faster rate (+12%) than nationally (+9%).
- The District has a high economic activity rate (82%) with a high employment rate (79%) and low unemployment (5%) when compared to regional and national comparators.
- Epping Forest District shows strong labour links to London, supporting high skills and earnings locally. Residents in Epping Forest are generally more skilled than residents elsewhere (52% with NVQ 1-3 in the District compared to 47% nationally.
- Resident earnings for people living in Epping Forest are generally higher than workplace-based earnings, and are considerably higher than the national and regional averages. Higher resident earnings reflect the District's labour ties to the surrounding districts (especially Harlow) and London.
- 2.1 This section provides an analysis of the current socio-economic conditions of Epping Forest, identifying both challenges and opportunities for the District. The analysis is based upon an extensive review of official datasets, including the 2011 Census of Population (and comparison with 2001 Census), and highlights the key points relevant to this study.
- 2.2 In order to fully understand the performance and socio-economic conditions affecting Epping Forest, this section uses comparator geographies as a benchmark analysis. These geographies are at the district (Harlow, Uttlesford, Chelmsford, and East Hertfordshire), the sub-regional (Essex) and regional (East of England) levels, as well the national (England) level to further contextualise the local performance of Epping Forest.



Economy

Strong Economic Growth

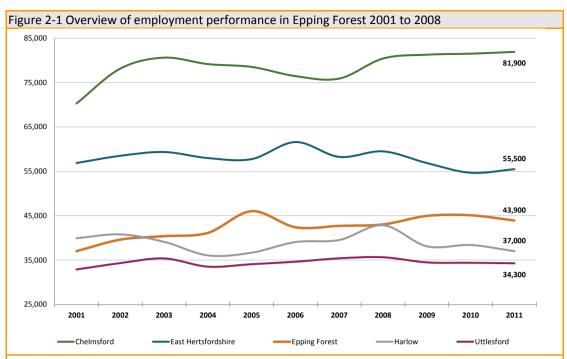
Over recent years, Epping Forest has experienced strong economic growth with both jobs and gross value added (GVA) increasing above the rate experienced by comparator locations. It is estimated that in 2011, Epping Forest contributed £2.1 billion to the UK economy, equating to an average of £48,000 GVA output per employee. This was in line with the average per employee across England (£48,800 GVA per employee) but higher than that seen across the East of England (£47,500 GVA per employee) reflecting the District's proximity to London and the South East. Over the past ten years Epping Forest outperformed all comparator areas increasing its GVA by 67%, compared to an increase of 47% across the East of England and 48% nationally.

Table 2-1 GVA contribution 2011						
	Employees 2011	GVA (£million)	GVA per Employee (2011)	Change in GVA 2001 to 2011		
Epping Forest	43,900	£2,10	£48,000	+67%		
Harlow	37,000	£1,776	£48,000	+31%		
Uttlesford	34,300	£1,645	£48,000	+47%		
Chelmsford	81,900	£3,932	£48,000	+65%		
East Hertfordshire	55,500	£2,856	£51,477	+31%		
Essex	518,600	£24,894	£48,000	+52%		
East of England	2,401,800	£114,117	£47,512	+47%		
England	2,3058,900	£1,124,881	£48,783	+48%		

Note: GVA figures for Epping Forest, Harlow, Uttlesford, Chelmsford and East Hertfordshire (districts) have been estimated using employment density. Employment densities from the Annual Business Inquiry (pre-2008) have been converted and made comparable with those from the Business Register and Employment Survey (post-2008).

Source: ONS, Regional Accounts, 2011; ONS, Business Register and Employment Survey, 2011; ONS, Annual Business Inquiry, 1998.

As of 2011 there were 43,900 people employed in Epping Forest District, around 7,000 more than in neighbouring Harlow, and 10,000 more than in Uttlesford District though fewer than in East Hertfordshire (12,000 fewer) and Chelmsford (38,000 fewer). Employment in Epping Forest District grew by around a fifth (+19%) between 2001 and 2011, compared to 7% across Essex and 2% regionally.



Note: ABI data for the pre-2008 period has been recalibrated according to the BRES post-2008 data. Source: Annual Business Inquiry, 2001-2008; ONS, Business Register and Employment Survey, 2008-2011

2.5 An analysis of employment trends between 2008 and 2011 (latest data available) indicates that Epping Forest was able to buck the trend and create jobs during a period in which there were widespread job losses and reduced growth. Job losses across Essex, the East of England and England were all in the region of 3%. Conversely, employment in Epping Forest grew by 900 new jobs (+2%) between 2008 and 2011.

Table 2-2 Overview of employment performance, 2001 to 2011							
	2011	Change 20	01 – 2011	Change 2008-2011			
	2011	Absolute	Percentage	Absolute	Percentage		
Epping Forest	43,900	+6,900	+19%	+900	+2%		
Harlow	37,000	-2,900	-7%	-5,800	-14%		
Uttlesford	34,300	+1,400	+4%	-1,400	-4%		
Chelmsford	81,900	+11,600	+17%	+1,500	+2%		
East Hertfordshire	55,500	-1,400	-2%	-4,000	-7%		
Essex	518,600	+35,000	+7%	-13,300	-3%		
East of England	2,401,800	+53,100	+2%	-78,100	-3%		
England	23,058,900	+322,700	+1%	-678,100	-3%		

Note: ABI data for the pre-2008 period has been recalibrated according to BRES (post-2008) data.

Source: ONS, Annual Business Inquiry, 1998-2008; ONS, Business Register and Employment Survey, 2008-2011.

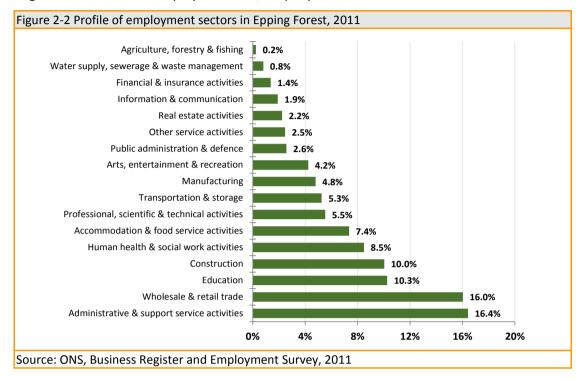
Key Sectors Reflecting Proximity to London and Resident's Needs

2.6 Administrative and support service activities, and wholesale and retail trade are two of the largest employment sectors within Epping Forest District, employing 7,200 (16%) and 7,000 (16%) people respectively. The proportion of people employed in administrative and support service activities in Epping Forest (16%) is considerably higher than that seen across the wider areas, although employment in wholesale and retail is mostly in line with that seen



nationally.

2.7 Education and Construction both employ 10% each of the people working in the District. Together these sectors employ around 9,000 people.



- 2.8 The table below indicates that when compared to the national average, the administrative and support service sector and the construction sector both have a concentration that is almost twice that seen nationally (LQ 1.82). These sectors reflect the role which Epping Forest plays in tapping into the London market in terms of provision of labour and serving the capital's businesses.
- 2.9 Specialisations are also seen in the creative sector (arts, entertainment and recreation) and real estate activities which are both highly concentrated locally with a location quotient of 1.7 and 1.6 respectively. Their concentration (as well as that for the construction and administrative and support service activities) is higher than that seen within the East of England economy. It is also worth noting the food sector; Epping Forest has a history of food production which it is currently seeking to build upon.

Table 2-3 Top ten employment specialisations in Epping Forest, 2011						
Epping Forest LQ vs. East of						
	Number	Percentage	England	LQ vs. England		
Construction	4,400	10%	2.2	1.8		
Administrative & support service activities	7,200	16%	2.0	1.8		
Arts, entertainment & recreation	1,900	4%	1.8	1.7		
Real estate activities	1,000	2%	1.4	1.6		

A location quotient (LQ) is a measure of an area's (e.g. Epping Forest) specialisation in a particular sector (e.g. construction) compared to the regional and national economy. Any LQ greater than 1 suggests specialisation in that particular sector.





Water supply; sewerage, waste management & remediation activities	400	1%	1.3	1.2
Other service activities	1,100	2%	1.2	1.1
Transportation & storage	2,300	5%	1.1	1.1
Accommodation & food service activities	3,200	7%	1.1	1.3
Education	4,500	10%	1.1	1.0
Wholesale & retail trade; repair of motor vehicles and motorcycles	7,000	16%	1.0	0.8

Note: A location quotient (LQ) is a measure of a region's specialisation in a particular sector compared to the regional or national economy. Any LQ greater than 1 suggests specialisation in a particular sector.

Source: Business Register and Employment Survey, 2011.

- 2.10 The table below identifies the sectors in Epping Forest that experienced growth, as well as those that experienced decline, in the period between 2008 and 2011. Administrative and support services (+17%), education (+23%), and the creative sector (i.e. arts, entertainment and recreation) (+45%) experienced considerable growth, together creating around 2,400 additional jobs over this short timeframe.
- 2.11 On the other hand, construction (-23%), professional, scientific and technical activities (-20%) and wholesale and retail trade (-6%) experienced a decline, resulting in the loss of around 2,500 jobs between 2008 and 2011. Construction was the hardest hit sector losing over a thousand jobs and shrinking by around a quarter between 2008 and 2011.

Table 2-4 Change in employment sectors in Epping Forest, 2008 to 2011					
	Change 2008 to 2011				
	Absolute	Percentage			
Administrative & support service activities	+1,000	+17%			
Education	+800	+23%			
Arts, entertainment & recreation	+600	+45%			
Manufacturing	+300	+16%			
Water supply; sewerage, waste management & remediation activities	+200	+134%			
Real estate activities	+200	+20%			
Public administration and defence; compulsory social security	+200	+20%			
Information and communication	+100	+8%			
Other service activities	+100	+12%			
Financial & insurance activities	-100	-11%			
Human health & social work activities	-100	-3%			
Wholesale & retail trade; repair of motor vehicles &					
motorcycles	-500	-6%			
Professional, scientific & technical activities	-600	-20%			
Construction	-1,400	-23%			
Source: Business Register and Employment Survey, 2008-203	11				

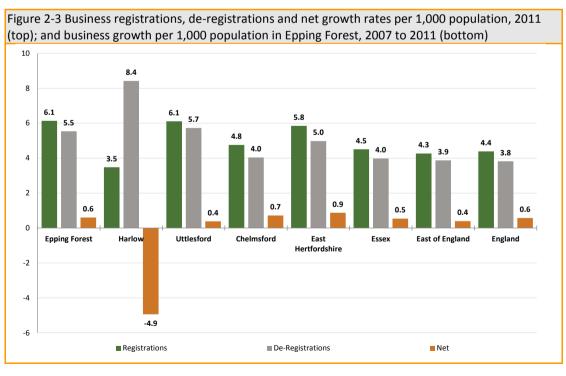
An Enterprising District

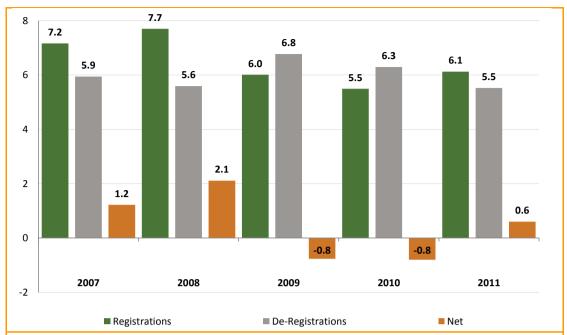
2.12 There are 6,600 businesses trading in Epping Forest. While the number of businesses has fallen in recent years due to the recession, there has been less of a decrease than experienced in comparator areas (typically a 2-3% fall) and the district has an above average business density (53 businesses per 1,000 residents) compared to elsewhere.

2.13 The majority of businesses trading within Epping Forest (89%) are micro-businesses employing less than ten people. This is higher than the proportion of micro-businesses seen in any of the comparator areas in the table below, including Essex (85%), the East of England (84%) and England (83%).

Table 2-5 Business sizes, 2011						
	2011	Micro Businesse	es (< 10 people)	10 people	or more	
	2011	Number	Percentage	Number	Percentage	
Epping Forest	6,600	5,900	89%	800	11%	
Harlow	2,700	2,200	79%	600	21%	
Uttlesford	5,000	4,400	88%	600	12%	
Chelmsford	7,700	6,400	83%	1,300	17%	
East Hertfordshire	7,500	6,600	87%	900	13%	
Essex	60,300	51,400	85%	8,900	15%	
East of England	250,000	211,100	84%	38,900	16%	
England	2,161,200	1,802,200	83%	359,000	17%	
Source: ONS, Local Un	its by Employmen	t Size Band, 2011.				

- 2.14 Data for Epping Forest indicates that in 2011 there were 800 new businesses registered within the District a rate of 6.1 new enterprises per 1,000 residents. This rate is the same as that seen in Uttlesford District (6.1 new enterprises per 1,000 population), but higher than that in Essex (4.5 new enterprises per 1,000 residents), the East of England (4.3 new businesses per 1,000 population), and nationally (4.4 new enterprises per 1,000 population).
- 2.15 The diagram below identifies business registration and de-registration rates per 1,000 residents in Epping Forest District between 2007 and 2011. It suggests that the current business formation rate (of 0.6 businesses per 1,000 residents) is not yet back to pre-recession levels of 1.2 and 2.1 new businesses per 1,000 residents seen in 2007 and 2008 respectively.





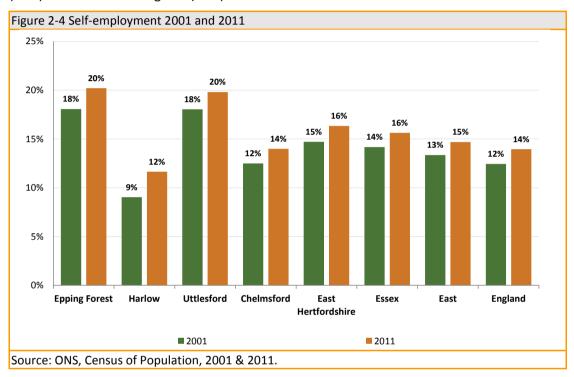
Source: ONS, Business Demography 2007-2011; ONS, Census of Population 2011; ONS, Mid-Year Population Estimates (2007-2011).

- 2.16 Epping Forest is especially enterprising when compared with the local, regional and national comparators. Despite this, only 86% of the businesses registered in Epping Forest in 2010 survived their first year of trading compared to 89% in Essex and 88% in the East of England. As experienced throughout England, business survival rates for new enterprises have declined considerably since the start of the recession.
- 2.17 Longer-term data for businesses registered in 2006 and 2007 indicates that businesses in Epping Forest have a lower survival rate than others registered across Essex and the East of England. This suggests that although the District is very enterprising, new businesses (especially micro-businesses) may need business support to assist them during their formative years.

Table 2-6 Business survival rates for businesses registered in each respective year							
		Business Registrations	1 Year Survival	2 Years Survival	3 Years Survival	4 Years Survival	5 Years Survival
	2006	800	90%	76%	61%	49%	41%
	2007	900	88%	76%	62%	50%	-
Epping Forest	2008	1,000	86%	68%	56%	-	-
	2009	700	91%	72%	-	-	-
	2010	700	86%	-	-	-	-
	2006	6,300	96%	81%	66%	53%	45%
	2007	6,900	95%	81%	63%	52%	-
Essex	2008	6,700	92%	74%	59%	-	-
	2009	5,900	93%	77%	-	-	-
	2010	5,900	89%	-	-	-	-
	2006	25,100	96%	81%	67%	54%	46%
	2007	27,600	96%	82%	64%	53%	-
East of England	2008	26,000	93%	75%	60%	-	-
	2009	23,500	93%	77%	-	-	-
	2010	22,600	88%	-	-	-	-

	2006	225,100	96%	81%	66%	53%	45%
	2007	246,700	95%	81%	63%	52%	-
England	2008	236,300	92%	74%	58%	-	-
	2009	209,000	91%	74%	-	-	-
	2010	207,500	87%	-	-	-	-
Source: ONS, Business Demography, 2011.							

2.18 Self-employment is another measure of how enterprising a location is. In 2011, around one-in-five (20%) people in employment in Epping Forest were self-employed. This was in line with the proportion seen in Uttlesford (20%), and over 4% higher than that seen in Essex (16%) and the East of England (15%).



2.19 The majority of self-employed people are usually home-based. A look at data from the 2011 Census of Population3 indicates that the proportion of individuals working mainly at or from home in Epping Forest (4%) is amongst the highest in Essex County, second only to that of Uttlesford (6%). The table below also shows that people in Epping Forest have a higher propensity to work mainly at or from home than people in both the East of England (4%) and nationally (4%). The business and professional services sectors tend to demonstrate a high percent of self-employment and home workers nationally. Discussion with Epping Forest District Council indicates that this is also true for the District.

Table 2-7 Proportion of resident population working mainly at or from home						
Work mainly at or from home Percentage of Total Population						
Epping Forest	3,700	4.1%				
Harlow	1,100	1.9%				
Uttlesford	3,700	6.4%				

³ A direct comparison of the number of people working mainly at or from home is not possible as the definition for this was changed in the 2011 Census of Population.

Chelmsford	4,700	3.8%			
East Hertfordshire	5,000	5.0%			
Essex	36,300	3.6%			
East of England	161,400	3.8%			
England 1,349,600 3.5%					
Source: Census of Population, 2011.					

Demography

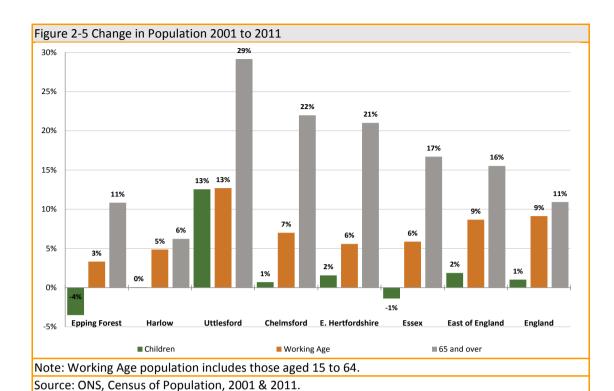
Population Growth

2.20 Over the past ten years Epping Forest's population grew by around 3% (+3,800 people). This growth rate was the lowest amongst all comparator areas and half that of Essex County (+6%). As the table below indicates population growth in Essex, (and Epping Forest) was considerably lower than that of both the East of England (+9%) and England (+8%).

Table 2-8 Overall population change 2001 to 2011				
	2001	2011	Change 2001 - 2011	
	2001		Absolute	Percentage
Epping Forest	120,900	124,700	+3,800	+3%
Harlow	78,800	81,900	+3,100	+4%
Uttlesford	68,900	79,400	+10,500	+15%
Chelmsford	155,800	168,300	+12,500	+8%
East Hertfordshire	128,900	137,700	+8,800	+7%
Essex	1,310,800	1,393,600	+82,800	+6%
East of England	5,388,100	5,847,000	+458,900	+9%
England	49,138,800	53,012,500	+3,873,700	+8%
Source: Census of Population 2001 & 2011.				

An Ageing Population

- 2.21 Population growth in Epping Forest was not experienced evenly across the different age groups within the District. An analysis of the 2011 Census of Population alongside that of the 2001 Census indicates that Epping Forest District is experiencing an ageing population. In the ten years between 2001 and 2011, the number of children under 16 decreased by four percent, whereas the proportion aged 65 and over increased by 11%.
- 2.22 Although this increase was in line with that seen nationally (+11%), a lower than average increase in Epping Forest's working age population has resulted in the District's population ageing at a faster rate than that in the East of England and nationally.



2.23 The 2011 Census-based sub-national population projections indicate (SNPP) indicates that by 2021 Epping Forest's population will increase by around 12% to 139,900 people (+14,600 over 2011 figures). This is greater than the overall increase projected in Essex (+11%), the East of England (+10%) and England (+9%).

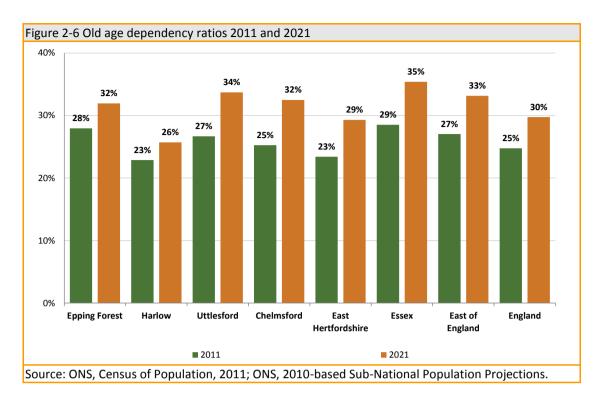
Table 2-9 Population projections 2011 to 2021				
	Children	Working Age	65 & Over	Total Change
Epping Forest	+18%	+7%	+22%	+12%
Harlow	+19%	+5%	+18%	+10%
Uttlesford	+26%	+7%	+35%	+15%
Chelmsford	+13%	0%	+29%	+7%
East Hertfordshire	+10%	+6%	+32%	+11%
Essex	+16%	+4%	+29%	+11%
East of England	+16%	+4%	+28%	+10%
England	+14%	+4%	+25%	+9%

Note: Working Age population includes those aged 15 to 64.

Source: ONS, Census of Population, 2011; ONS, 2011-based Sub-National Population Projections.

2.24 Epping Forest's population is projected to continue ageing, and the problem of an ageing population will become further exacerbated as the District's old age dependency ratio4 becomes higher. The 2011-based SNPP indicates that by 2021 Epping Forest's old age dependency ratio (32%) will be amongst the highest in Essex, and two percent higher than that seen nationally.

⁴ The old age dependency ratio is a measure of the number of people aged 65 and over as a percentage of the working age population (aged 16-64).



High Rates of Economic Activity and Employment

- 2.25 Data from the 2013 Annual Population Survey indicates that 82% of Epping Forest's population is economically active, compared to 80% in the East of England, and 77% nationally.
- 2.26 Around four-in-five of the economically active people in Epping Forest are employed. This ranks amongst the highest in Essex, and is higher than the County's overall employment rate (73%), as well as that seen regionally (75%) and nationally (71%).

Table 2-10 Economic Activity, Employment Rate, Unemployment Rate and Inactivity Rate				
	Economically Active			Economic
	Economic Activity Rate	Employment Rate	Unemployment Rate	Inactivity Rate
Epping Forest	82%	79%	5%	18%
Harlow	74%	64%	13%	26%
Uttlesford	84%	84%	n/a	16%
Chelmsford	85%	78%	8%	15%
East Hertfordshire	87%	83%	5%	14%
Essex	79%	73%	8%	21%
East of England	80%	75%	7%	20%
England	77%	71%	8%	23%
Source: ONS, Annual Population Survey, 2013				

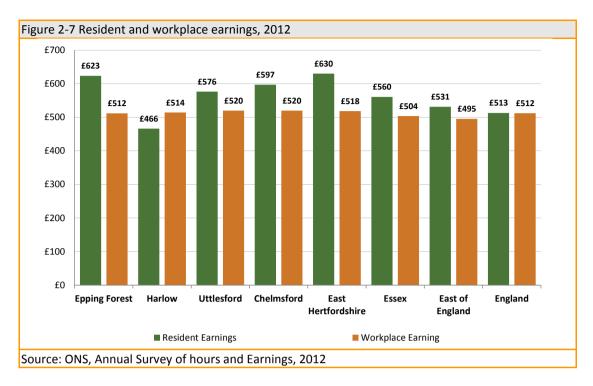
2.27 The economic inactivity rate includes those who are outside of the labour market voluntarily (e.g. because of family responsibilities or early retirement) as well as those who have withdrawn from the labour market due other reasons (e.g. discouragement, long-term illness, and retirement). Economic inactivity in Epping Forest (18%) is lower than that seen in any of the larger comparator areas (21% in Essex, 20% in the East of England and 23% nationally).

Strong Labour Market Links to London Supporting High Skills and Earnings

2.28 The table below illustrates that in 2013, a third (33%) of Epping Forest's population was qualified to level four or above (equivalent to a university degree), compared to 28% in Essex County. This was, in line with the averages seen across the East of England (34%) and England (33%). The proportion of people with no qualifications in Epping Forest District (9%) is broadly in line with that seen across Essex and regionally (both 8%) and nationally (9%).

Table 2-11 Overview of Resident Qualifications, 2012					
	No Qualifications	Trade Apprenticeships	NVQ 1-3 Only	NVQ4+	Other Qualifications
Epping Forest	9%	2%	52%	33%	4%
Harlow	16%	3%	43%	35%	3%
Uttlesford	9%	0%	57%	28%	5%
Colchester	6%	2%	47%	37%	7%
East Hertfordshire	4%	1%	48%	42%	5%
Essex	8%	3%	55%	28%	6%
East of England	8%	4%	49%	33%	6%
England	9%	3%	47%	34%	6%
Source: ONS, Annual Population Survey, 2013					

- 2.29 Over half of the residents (34,100 people) in Epping Forest are employed in higher managerial positions (i.e. managers, directors and senior officials, as well as professional occupations and associate professionals). This is around seven percent higher than the average seen across Essex and the East of England (both at 45%) and is a likely consequence of the proximity to London and the District's role in providing labour to the Capital.
- 2.30 There is however, a disparity in occupations and earnings between those living and those working in the District. People employed in higher managerial positions within Epping Forest is considerably lower (18,700 people), indicating that Epping Forest is a net exporter of skilled labour to the rest of Essex and the surrounding areas.
- 2.31 Resident earnings for people living in Epping Forest are over 20% higher than the earnings for people working within the District. Earnings for people working in Epping Forest are in line with the average seen across districts in Essex and nationally. These are however, 2% higher than the overall average for the County, and 3% higher than the average workplace earnings in the East of England.



2.32 Data on commuting flows from the 2011 Census of Population is not yet available. Nevertheless, the analysis above and data from the 2001 UK Travel Flows (2001 Census of Population), indicate that Epping Forest District experiences a net daily outflow of people to the surrounding districts and regions, in particular London which accounts for almost all of the net outflow of 19,000 residents. We anticipate that the forthcoming 2011 update will show that London remains the main commuter destination for Epping Forest residents.

Table 2-12 Overview of commuting flows for Epping Forest, 2001				
	People working in Epping Forest and living in	People living in Epping Forest and working in	Net Flow	
Harlow	2,110	2,230	-120	
Uttlesford	630	510	+120	
Chelmsford	730	480	+250	
East Hertfordshire	1,090	1,080	+10	
Rest of Essex (excluding Epping Forest)	5,030	4,330	+700	
East of England	30,550	30,800	-250	
London	7,120	26,150	-19,030	
England	38,490	57,730	-19,240	
Source: Census of Population, UK Travel Flows, 2001				

Disparities in Housing Affordability

2.33 The London Commuter Belt (East) / M11 Sub-Region Strategic Housing Market Assessment (SHMA) (2008) shows that there is virtually a complete absence of market housing options affordable to households with incomes less than £30,0005 within the region. An analysis of

⁵ 2008 incomes

long term affordability trends suggest that there will be a long term shift away from home ownership to private renting within the whole sub-region.

- 2.34 In addition, the SHMA estimates that assuming the relationship between housing costs and household income remains constant, the proportion of households who are homeowners is likely to fall from 74% in 2001 to 64% by 2026. In reality, this relationship will not remain constant, as the credit crunch has resulted in banks being more prudent in lending money. This suggests that there will be an even smaller proportion of home owner by 2026 (fewer than 64%).
- 2.35 The Assessment also draws attention to a gap in housing provision for households that can afford more than a social rent but not afford market housing (i.e. intermediate affordable housing). The widening ratio of house prices to incomes makes it increasingly difficult for those on low incomes to obtain decent accommodation near their workplace.
- 2.36 Evidence from the SHMA indicates that house prices in Epping Forest are well above the national average, with the Green Belt and other restrictive planning policies exacerbating market pressures. Land in Epping Forest is therefore particularly scarce and expensive. This is making it increasingly difficult for the next generation of residents to afford a house in the area.

Policy

2.37 The following section discusses in brief the national, regional and local policy context influencing development in Epping Forest District. A fuller analysis on the national, regional and local policy is attached in A.1Appendix A.

National Policy

- 2.38 On the national context it is acknowledge that the prolonged economic downturn has had a profound effect on the UK and local economies. The Coalition Government's Plan for Growth (2010) aims of achieving a strong, sustainable and balanced economic growth across Britain, and aspires to create a competitive tax system, making the UK a better place to start, finance and grow a business, encourage investment and create a more educated workforce.
- 2.39 To achieve this, the **National Planning Policy Framework (NPPF)** published in 2012 makes a presumption in favour of sustainable development based on the three dimensions the planning system can play:
 - Economic: the planning system is able to perform an economic role through supporting growth and innovation.
 - Social: the planning system is able to perform a social role through supporting strong, vibrant and healthy communities.
 - Environmental the planning system is able to perform an environmental role through protecting and enhancing the natural, built and historic environment.
- 2.40 The Government is also advocating a greater shift towards localism, through the **Localism Act 2011** (2011) which aims to provide a substantial and lasting shift in power away from



Central Government towards local people.

Regional and Sub-Regional Policy

- 2.41 At the sub-national level, the most significant strategic development in recent years has been the abolition of the Regional Development Agencies (RDAs) and the creation of Local Enterprise Partnerships (LEPs) as part of the localism agenda. The South East LEP (SE LEP) covering Essex, Kent and East Sussex, under which Epping Forest falls, aspires for the subregion to become "the most enterprising economy in England".
- 2.42 The Greater Essex Integrated County Strategy (2010) and the Essex Economic Growth Strategy (2012) set out a number of overarching economic objectives for the whole County. The Integrated County Strategy aims to make a significant contribution to UK economic growth and recovery through the creation of a highly performing and competitive economy. Similarly the Economic Growth Strategy's vision is to make Essex an economically vibrant and successful entrepreneurial County where businesses and residents can grow and fulfil their full potential.

Local Policy

- 2.43 Following guidance set out in the NPPF, Epping Forest District Council is in the process of producing its Local Plan, and is currently finalising its response to the Issues and Options for the Local Plan Consultation Document published in 2012. Despite not making any policy recommendations this paper puts forward a vision to "protect and enhance green spaces whilst encouraging appropriate levels of growth to provide for the housing, employment and social needs of the District."
- 2.44 Evidence gathered for the **Issues and Options Paper** suggests that development opportunities within the District's existing urban boundaries are rapidly running out, and that there is insufficient land within the current policy designations to meet the District's needs for housing and employment land, even if the lowest targets where to be chosen.
- 2.45 The **Epping Forest District and Brentwood Borough Employment Land Review** (2010) identified that employment in Epping Forest is dominated by three sectors distribution, hotels and restaurants; banking and finance; and public services. The study forecasts a net growth of 1,000 jobs in Epping Forest, requiring 5.8 ha of additional employment land by 2031.
- 2.46 The **Epping Forest Town Centres Study** (2010) proposes a revision of the District's hierarch of town centres and identifies a quantitative need for 62,300 sq. metres of A1-A5 uses between 2009 and 2031. This study also identified a high amount of expenditure leakage in both comparison and convenience goods shopping to areas outside of Epping Forest. It suggests that this is due to a lack in the "critical mass" and diversity of retail failing to attract consumers on a regular basis.



3. Potential for Future Growth

Summary

- According to the latest EEFM forecasts, the number of jobs in the district is projected to increase by c.8,400 between 2011 and 2031, compared to a target of 4,000 suggested by the Council in the Issues and Options paper. This level of employment growth would require in the region of 14,000 homes.
- Growth is expected within sectors requiring office space while there is projected to be a decline
 in industrial and warehouse operations and associated employment land. Epping Forest has seen
 an increase in professional and business services including self-employed consultants and
 companies serving the London market across a range of sectors. Construction is a key employer,
 while the Council is also pursuing a strategy to build on the food production historic to the area.
- Key sectors for the wider LEP area are advanced manufacturing, environmental technologies, offshore wind and renewable energy, agriculture and food processing, logistics, financial and business services, tourism and creative industries. Epping Forest will have a role to play in achieving the LEPs vision for growth.
- The Council's Issues and Options paper suggests delivery of between 7,700 and 11,400 homes across the District between 2011 and 2033. It should be noted that this target is based on out of date projections and is too low to meet the needs of the growing population and the 'duty to cooperate' with Harlow, as well as to achieve the District's economic potential.
- The population of Epping Forest is forecast to increase significantly over the next twenty years, requiring in the region of 16,000 new homes. In addition, more than 3,000 new homes would be required to meet some of Harlow's need through the 'duty to cooperate'.
- If the housing and employment targets remain low and are not exceeded, the Local Authority may be limiting the area's economic potential by failing to provide sufficient homes to meet the jobs and residential growth of the borough, both of which would help to deliver economic benefits for the area (explored in Chapter 4).
- 3.1 In this chapter we explore the potential for housing and employment growth in Epping Forest and compare this with the targets proposed by the District Council through the Local Plan process. In doing so we draw on existing evidence. In particular:
 - The Issues and Options paper produced by the council to consult on the detail of the forthcoming Local Plan. This is the most recent document setting out the proposals for the scale of growth of the area
 - Various supporting evidence documents for the Local Plan such as housing scenarios produced by Edge Analytics
 - The Representation Statement produced by Boyer Planning on behalf of CEG and Hallam Land Management together with background documents such as JG Consulting's analysis of housing requirements.

Employment Growth

3.2 Employment growth is a clear priority for Epping Forest residents and is likely to be a key consideration of the emerging Local Plan; 'encouraging local jobs and businesses is one of the highest priority issues for residents'11. The District Council is consulting on a potential target of 3,917 to 3,960 jobs.

Table 3-1 Jobs Growth Targets – Consultation Options (2011/12-2032/33)		
1 – East of England Plan	3,960	
2 – Need Identified by Employment Land Review	3,917	
and Town Centres Study		
Source: Planning our Future: Community Choices – Issues and Options for the Local Plan,		
Consultation Document (July 2012) Epping Forest District Council		
Note: Figures are rounded to nearest 100		

Considerations

- 3.3 We consider these proposed targets to be below requirements to support growth. There are a number of reasons for this:
 - The higher target is not based on an up to date evidence base which sets out the potential for employment growth. The National Planning Policy Framework (NPPF) states that 'to help achieve economic growth, local planning authorities should plan proactively to meet the development needs of businesses and support an economy fit for the 21st century' (para.21). The higher target is based on rolling forward the assumed allocation made for Epping Forest within the East of England Plan. As noted previously, we consider that the RSS is now considerably out of date, does not reflect the local context and on inspection will be found to be an unsound basis for setting an employment target for the area.
 - The lower target combines the jobs growth identified through the ELR (based on the 2009 East of England Forecasting Model modified by Atkins) and that identified for town centre uses as per the Town Centres Study represents constrained jobs growth. The EEFM scenario which was used (scenario 3b) was a modified version of the EEFM reflecting local government aspirations regarding employment growth and as such presents a much constrained scenario. For example, the 3,500 jobs growth indicated within scenario 3b compared to a much higher jobs growth of 9,100 jobs as projected in the EEFM 2009 baseline forecast.
 - The jobs target identified for Epping Forest is not conducive to supporting a growing economy as required by the NPPF. The target is equivalent to less than half of the projected rate of jobs growth according to the latest EEFM (0.3% per annum compared to 0.7% per annum) which would suggest a stagnating economy unless the targets are exceeded. The ELR corroborates that this level of growth is not sufficient, stating that the RSS policies, which provide the upper end jobs target, 'are preventing the economy growing to its full potential'. If the level of jobs growth



⁶ Cited in Epping Forest Issues and Options for the Local Plan Consultation, Representation Statement (October 2012) Boyer Planning on behalf of Commercial Estates Group and Hallam Land Management

projected by the 2013 EEFM were to be achieved (8,400 jobs or 0.7% per annum) this would still be much smaller than the historic 2.8% per annum from 1995 to 2008, suggesting that an increase of 8,400 over the 22 year period is ambitious but not over-optimistic.

- The Epping Forest District and Brentwood Borough Employment Land Review (ELR) (September 2010) sets out a number of jobs growth scenarios of which the RSS and EEFM (2009) scenarios are the lowest. It notes that the district needs to be 'proactive and positive in planning for economic growth' and 'minimise commuting and promote more sustainable communities by achieving a closer relationship between jobs and homes' Error! Bookmark not defined.
- The Issues and Options paper identifies insufficient land to meet the needs of the job targets it identifies, highlighting the need to change some existing designations both within and outside settlements. Higher jobs targets will therefore require further additional land provision. This suggests that the jobs targets may have been restricted to better align to land availability and are therefore not based on identified potential for economic growth.

Employment Growth Sectors

- 3.4 The South East Local Enterprise Partnership (LEP) of which Essex (and therefore Epping Forest) is part, has set out a vision for the LEP are. The Vision identifies the following sectors as key to driving economic growth in the area: advanced manufacturing, environmental technologies, offshore wind and renewable energy, agriculture and food processing, logistics, financial and business services, tourism and creative industry companies⁷.
- 3.5 Epping Forest will have a role to play within this Vision. The latest EEFM (Spring 2013) provides employment projections by sector for the district. The largest employment sectors by 2031 are anticipated to be: business services (9,700 employees), construction (9,700), education (5,000), retail (4,600), professional services (4,300), hotels and restaurants (4,200), health and care (4,200), arts and entertainment (3,700), land transport (3,600) and wholesale (3,200).
- 3.6 Jobs growth is expected to be led by increases in business services (+3,200 employees), construction (+1,300) and professional services (+1,100). These sectors are important to the local economy and reflect the Districts' proximity to the London market.
- 3.7 Other sectors projected to increase in employment primarily relate to the residential base of the District and include leisure and creative industries such as arts & entertainment and hotels & restaurants, land transport and real estate. There are anticipated losses in manufacturing, transport, wholesale and the public sector. In the absence of an up to date ELR we anticipate that these sectoral changes will lead to a loss of B1c/B2 (industrial) and B8 (warehouse) uses and an increase in B1a/b (offices). This corresponds to the current, though



⁷ South East Local Enterprise Partnership Vision and Mission Statement

slightly out of date, ELR8 which indicates a loss of industrial and warehouse land in the region of 9 and 2 hectares respectively and a gain of 6 hectares in employment land for office use.

EEFM	ELR -based on RSS	ELR –based on EEFM 2009	
Top 10 Employment Sectors in 2031			
 Business services (9,700) Construction (9,700) Education (5,000) Retail (4,600) Professional services (4,300) Hotels and restaurants (4,200) Health and care (4,200) Arts and entertainment (3,700) Land transport (3,600) Wholesale (3,200) 	 Construction (8,300) Health and social security (8,100) Business services, labour recruitment, security and cleaning (7,100) Retail (4,700) Other personal services: miscellaneous (4,600) Education (4,400) Hotels and restaurants (3,700) Distribution (3,100) Business services: other tradable (2,400) Land and other transport (1,800) n.b all Business services combined = 12,900 	 Construction (8,600) Health and social security (8,400) Business services, labour recruitment, security and cleaning (7,300) Retail (4,900) Other personal services: miscellaneous (4,700) Education (4,600) Hotels and restaurants (3,800) Distribution (3,200) Business services, other tradable (2,500) Land and other transport (1,900) n.b all Business services combined = 13,300 	
Total employment = 66,300	Total employment = 55,600	Total employment = 57,500	
Top 3 Growth Sectors (2011-2031) Business services (+3,200) Construction (+1,300) Professional services(+1,100)	 Health and social security (+3,200) Business services: Labour recruitment, security and cleaning (+2,000) Hotels and restaurants (+200) and Business services: other including call centres (+200) 	 Health and social security (+3,500) Business services: Labour recruitment, security and cleaning (+2,200) Hotels and restaurants (+400) 	
Total employment growth = 8,400 Source: East of England Forecasting N	Total employment growth = 3,500	Total employment growth = 5,500	

3.8 Growth for the district is projected to be led by business services and is a reflection of Epping Forest's proximity to London, making it an ideal location from which to serve the London market in both business and professional services. However, Epping Forest has a lower forecast percent change for professional (35%) and business services (50%) than Essex as a whole (50% and 53% respectively) indicating it is being out-performed in these key sectors by other locations in the county. Similarly, neighbouring Hertfordshire is projected to experience growth at a much higher level: 58% in professional services and 60% in business services. The Council may need to take a 'policy on' approach to ensuring it retains its competitive strengths in these sectors.

Note: The sectors used by the EEFM and within the ELR vary slightly, with the later sub-dividing some sectors and

Employment Land Review, Final Report (September 2010) Atkins

combining others, so a direct comparison is not always possible.



⁸ Epping Forest District and Brentwood Borough Employment Land Review, Final Report (September 2010) Atkins

3.9 The jobs growth potential of the district is being limited by the Council's proposed job targets and land allocations. There is considerable potential to achieve more which should be a key consideration if Epping Forest wishes to retain or indeed expand upon its current sector strengths.

Employment Land Requirements

- 3.10 An Employment Land Review (ELR) was carried out in 2010 to assess the scale of B use class employment land required in Epping Forest over the plan period⁹. B class employment uses refer to offices (B1a and B1b), industrial uses (B1c and B2) and warehouses (B8). They are typically occupied by those business sectors which provide value added for the local economy by exporting goods and services to other markets, for example professional and business services, manufacturing and distribution, as opposed to public services and retail which meet the needs of the local population for example.
- 3.11 The ELR uses government economic projections alongside Atkin's own analysis, to estimate a net gain of 1,000 new B use class jobs to 2033. This is comprised of a loss in some sectors which are exceeded by gain in others. Overall a requirement for an additional 6 ha of office space (B1a and B1b) is forecast and a loss of land for factories (B1c, B2 and sui generis) and warehousing (B8) of 9 ha and 2 ha respectively. Given that the latest EEFM demonstrates a higher rate of growth than the previous iterations, this may under state the employment land requirements.

Table 3-3 Land Requirements of Forecast Job Growth				
Broad Planning Use Class	Sector	Total Jobs Growth to 2033	Total Floorspace Required (ha)	Total Land Required (ha)
Offices (B1a and B1b)	Banking and Finance	+2,300	4.37	+5.83
Factories (B1c, B2 and sui generis)	Construction	-1,100	-3.52	-8.80
Warehousing (B8)	Distribution and Wholesale	-200	-1.00	-2.00
Total B Uses	N/A	+1,000	-0.15	-4.97

Source: Epping Forest District and Brentwood Borough Employment Land Review, Final Report (September 2010) Atkins

3.12 To allow for choice and indigenous and inward investment need the ELR recommends that at least 50% more employment land should be provided than identified as needed. A total of 66,000sqm of floorspace or 8.7 ha of employment land is therefore required. In addition, there are expansion requirements arising from medium and larger businesses, in particular B2 occupiers.

Table 3-4 Overall Employment Provision Required		
Floorspace (sqm)	66,000	
Employment Land (ha)	8.7	
Source: Epping Forest District and Brentwood	Borough Employment Land Review, Final Report	



(September 2010) Atkins

Availability of Employment Land

- 3.13 A review of the medium/long term development opportunities in the borough indicated that there are 13 relevant sites, providing 10.3ha in total with the largest individual site provision being 4.7ha. It does not appear that Latton Priory was included in these considerations. The Latton Priory site can deliver employment land over twice the size of the largest site identified.
- 3.14 Delivery of B1 sites is recommended for town centres as well as greenfield locations that are close to the strategic road network and adjacent to urban areas. Such locations will be ideal for high quality business and industrial park premises.
- 3.15 The ELR notes that in order to achieve the level of additional B1 employment land required, it will be necessary for the council to consider allocation of **potential new employment sites given the tightness in identified future supply relative to demand**. The ELR identifies the consequences of undersupply of employment land:
 - The dormitory role of Epping Forest will be exacerbated, with high and growing levels of net out-commuting
 - There will be a reduction in available local job opportunities for local residents which
 is particularly important for those who are less well qualified to travel outside of the
 area for employment
 - Indigenous businesses are forced to relocate outside of the area and new start-ups have to find premises elsewhere due to lack of choice and availability.
- 3.16 The more recent Strategic Land Availability Assessment (2012)10 explores the provision of sites across the District and concludes that there are sufficient sites to provide the employment floorspace required. Latton Priory is included within this analysis.
- 3.17 The potential development of up to 15 ha of employment land at Latton Priory would more than meet the land requirements as set out in the ELR.

Housing Growth

- 3.18 The NPPF is the key government document for planning. It sets out the requirements for sustainable development (economic, social and environmental). Importantly, it requires every local authority to 'use their evidence base to ensure that their Local Plan meets the full, objectively assessed needs for market and affordable housing in the housing market area' (para 47). Epping Forest DC recognises this requirement in their Issues and Options paper, stating 'the Council must therefore make reasonable provision for such requirements, even in a district within is over 92% Green Belt'' (p.22).
- 3.19 The Community Visioning exercise carried out with residents as part of the development of



¹⁰ Epping Forest District Council (May 2012) Strategic Land Availability Assessment, Main Report, Atkins

the Issues and Options for the Local Plan identified the following in relation to housing 11:

- A need for more housing, including a mix of types and sizes to meet the varying needs of the community
- A need for affordable housing throughout the district
- A pattern of growth which focuses development close to public transport links and around or within existing towns.

Proposed Housing Targets

3.20 The Issues and Options Paper produced by Epping Forest District Council consults on the potential to deliver between 6,400 and 10,200 new homes in Epping Forest through strategic developments over the plan period. When homes with extant planning permission, windfall sites and plans to bring empty homes back into use are included, the number of additional homes proposed ranges from 7,700 to 11,400.

Table 3-5 Housing Targets – Consultation Options (2011/12-2032/33)				
	Housing Need	Housing Target (excluding extant permissions, windfall and bringing empty homes back into use)		
A – Official population projections	11,400	10,200		
B – Combined East of England Plan/Update of official population projections	10,100	8,900		
C – Original Adopted East of England Plan target updated to 2033	7,700	6,400		

Source: Planning our Future: Community Choices – Issues and Options for the Local Plan, Consultation Document (July 2012) Epping Forest District Council

Note: Figures are rounded to nearest 100

3.21 These three options have been identified through consideration of nine scenarios developed by Edge Analytics, which also included zero overall migration (4,000 additional homes); an update of official population projections (10,300); and various iterations of the East of England Plan (3,500-10,000).

Considerations

- 3.22 Epping Forest DC has selected the three development options does not suggest the housing target will meet the needs of the current or future population of the area:
 - The District Council notes that the Sub National Population Projections (SNPP) (A)



Planning our Future: Community Choices – Issues and Options for the Local Plan, Consultation Document (July 2012) Epping Forest District Council, p.22

should be updated following release of the 2010 SNPP¹². Applying the updated projections, JG Consulting estimated that there will be a requirement for 15,900 dwellings over the same period using 2010 SNPP applied to Census 2011 base data¹³. Delivering homes according to the upper end of the range suggested by the local authority (11,400) will only meet approximately 70% of housing need in the district (15,900) based on these updated projections.

- This does not take into account housing need arising within the wider housing market area and Harlow in particular. The Issues and Options paper considers the 'duty to cooperate' within a number of scenarios, implying a range of 4,500 and 6,400 additional homes on top of the local housing need to accommodate Harlow's housing requirements¹⁴. This would suggest some 20,400 additional homes would be required as a minimum (15,900+4,500).
- The latest data released indicates that the population may increase at a greater level than previously projected, requiring a greater number of homes. The 2011 SNPP projects an increase of 14,400 residents (12%) in Epping Forest between 2011 and 2021 (this data set does not project for any further years). This compares to the 2010 SNPP projection of a 13,000 increase in residents, equivalent to a 10% increase, over this time period¹⁵. The requirement for 15,900 new homes identified by JG Consulting should therefore be treated as a minimum given that the government projections have since increased.
- In using the RSS target both within a combined scenario (B) and as a stand-alone option (C) the options provided are skewed towards lower figures. The Representation Statement produced by Boyer Planning notes that 'the original three options already included an RSS based figure and it is not clear what distinction is to be made between the two RSS based options or why they produce different figures'.
- Unless proven to still be appropriate, the RSS is now a revoked target and is no longer up to date nor considered a robust and credible mechanism on which to base a local housing target. If, when tested, the RSS based target is found to not be based on an updated, objectively assessed need this would render the plan unsound¹⁶.
- The Council's five year housing land supply is in place as required by the NPPF. However its deliverability is of concern. A total of 800 net new dwelling units are



¹² Planning our Future: Community Choices – Issues and Options for the Local Plan, Consultation Document (July 2012) Epping Forest District Council, p.24

¹³ Epping Forest Issues and Options for the Local Plan Consultation, Representation Statement (October 2012) Boyer Planning on behalf of Commercial Estates Group and Hallam Land Management, citing Estimating Housing Requirement's Epping Forest (Update) (September 2012) JG Consulting

¹⁴ A previous study jointly commissioned by EFDC, Harlow and East Herts Council's (Generating and Appraising Spatial Options for the Harlow Area, Scott Wilson, January 2010) suggested that between 3,000 and 4,000 new homes could be accommodated within Epping Forest on land surrounding Harlow (see page 42 of Issues and Options paper).

¹⁵ Similarly, CLG's most recent household projections (2011 based) indicate that over the next decade (2011-2021) there will be growth of 7,000 homes in the district, compared to 5,000 projected in the 2008 release.

Epping Forest Issues and Options for the Local Plan Consultation, Representation Statement (October 2012) Boyer Planning on behalf of Commercial Estates Group and Hallam Land Management, p.11

predicted to be built between 2012/13 to 2016/17 compared to a requirement for 580 based on the East of England Plan. Notwithstanding our earlier consideration that the RSS is a no longer sound basis on which to plan for housing need and is grossly underestimating requirements, over half of the supply (440 dwellings) for the next five years is for sites which have planning permission but which have not commenced and a further 100 dwellings do not yet have planning permission, leading to uncertainty over these sites (associated with 70% of the five year supply) coming forward within the timeframe. The Local Government Association recently announced that 400,000 homes across England have planning permission but have not been built, over two-thirds of which are not yet on site. In addition, it now takes an average of 27 months (over two years) from receiving planning permission to completion of the new homes¹⁷, giving greater uncertainty over the deliverability of the identified supply within the five year timeframe.

- The housing target is insufficient to enable the district to achieve its economic potential. Based on the 2010 government projection for employment growth, Epping Forest DC estimates that 14,256 homes will be required. This is some 2,900 more homes that the upper end housing target proposed by the Council. A housing target of up to 11,400 new homes will therefore be insufficient to support the projected level of employment growth according to the EEFM, meaning that Epping Forest will not be able to achieve its full economic potential.
- 3.23 There is considerable need for housing growth in the district based on demographic change. However, the proposed Local Plan housing targets and the five year land supply are likely to act as significant constraints in achieving this. This will consequently affect the extent to which economic benefits associated with additional residents in the area can be achieved. These benefits are explored in more detail in Chapter 4.

The Relationship between Housing and Employment Growth

- 3.24 Provision of new homes will also support employment growth. There is a mutually exclusive relationship between jobs and homes, with the two reinforcing one another:
 - Homes help to attract residents to, or retain them within, an area which strengthens the labour force through provision of labour across a range of skills
 - Supporting population growth through the provision of homes creates demand for local shops and services which in turn support jobs
 - In providing a greater range of skills and contributing to local expenditure, new homes support existing businesses and also attract new inward investment which subsequently helps to support and create further jobs.



http://www.local.gov.uk/web/guest/media-releases/-/journal_content/56/10171/4107631/NEWS-TEMPLATE accessed 23.08.13

4. Benefits of Growth

- 4.1 Delivery of housing and employment is a key government objective in relation to economic recovery and growth and will help the District to achieve its economic potential as well as a number of other objectives.
- 4.2 Latton Priory has considerable potential to deliver a range of economic benefits. The Issues and Options paper recognises this potential:
 - South of Harlow (corresponding to the Latton Priory site) has been identified as a potential development option (HAR C) within the Issues and Options paper. Its particular benefits relate to its proximity to Harlow, its ability to assist in the regeneration of neighbourhood renewal areas within Harlow and the potential to upgrade Junction 7 of the M11.
 - Land between the M11 and A414, to the east of Latton Priory has been identified as
 having potential to deliver 7ha of employment land (HAR D). The site will act as a
 gateway development to Harlow and provide employment close to motorway
 access. It will also help to deliver upgrade works to Junction 7 of the M11.
- 4.3 The *scale* of development possible at Latton Priory as well as the *location* of the site mean that it is able to generate specific benefits which would not be realised by other sites.

Benefits of Employment Growth at Latton Priory

Creating jobs to ensure Epping Forest is an important player in the sub-regional economy

4.4 Epping Forest performs well against a number of key economic indicators (see Chapter 3) though also demonstrates some areas in which comparator locations have a competitive edge. For example, growth in the District's key sectors of business and professional services is projected to be lower than in neighbouring East Hertfordshire over the next two decades. Where growth is projected, delivery of employment sites to meet these needs will support this growth and help the District to achieve its potential.

Helping the District to achieve its economic potential

- 4.5 The Issues and Options paper identifies a target of between 3,900 and 4,000 jobs over the Plan Period. Latest government projections indicate that this growth could be higher still (c.8,400 jobs).
- 4.6 The development of Latton Priory will generate a number of specific economic benefits. The 15ha of employment land available for development through the site is more than enough to provide the 6ha office employment land required (or total of 8.7ha to allow for flexibility) and the 2,300 jobs as identified in the ELR.
- 4.7 CEG and HLM previously undertook an assessment of the potential scale of economic benefits as a result of Latton Priory. The technical assessment considered five scales of



development in 500 residential unit intervals, up to a maximum of 2,500 units. We set out the key impacts below. These relate specifically to the district of Epping Forest:

- 70 temporary construction jobs per year on average or 142 permanent direct Full Time Equivalent (FTE) jobs over a 20 year build period.
- 2,440 direct jobs provided on site or 2,170 direct FTE jobs. These positions will be dependent on the final employment uses developed on site but are likely to include a range of occupations (including managerial and professional as well as lower skilled occupations) within a number of sectors (for example business and professional services as well as retail and public sector, such as education).
- An additional 435 indirect FTE jobs in the local area through multiplier effects. These
 positions will in part be dependent on the employment uses provided on site as this
 will inform supply chains.
- An additional £133.9 million in GVA per annum for the local economy as a result of the direct on site employment, representing a 6% increase in Epping Forests GVA in 2012.
- A total of £19.6 million gross expenditure per annum on everyday goods and services in Epping Forest District will support further jobs in local shops and services.
 Typically these will be in retail, service industries (such as restaurants and hair dressers) as well as in public sector services (such as health and education).

Providing the necessary scale for employment development

- 4.8 Latton Priory offers a significant scale of employment use development opportunity. The ELR recognises that this a minimum size requirement is important to ensure commercial viability and to generate the critical mass of B-class uses required when new locations are being developed. The size requirement varies with B1a clusters typically requiring smaller sites to be viable than those required for B1c development.
- 4.9 Given the scale of the Latton Priory site it has the potential to respond to requirements across the broadest range of sectors and uses as well as to provide for ongoing expansion requirements typical of B1c/B2 and B8 firms. The potential development of up to 15 ha of employment land at Latton Priory would more than meet the land requirements as set out in the ELR and also provides a suitable site for the development of high quality business and industrial park premises adjacent to both a strategic road network and an urban area as recommended in the ELR.

Responding to local need

4.10 The jobs available on site as a direct consequence of the Latton Priory scheme as well as those supported indirectly will provide important employment opportunities for local residents. The construction sector lost a number of jobs in recent years and the development of the scheme will provide approximately 142 permanent FTE opportunities in this sector. Health and social work, which has also lost jobs recently, will be supported through resident demand.



4.11 In July 2013 there were 2,000 residents claiming Job Seekers Allowance in Epping Forest. The most common occupations sought were sales; administrative positions; elementary trades; and corporate managers. Positions such as these will be provided through the scheme as referenced above.

Diversifying the local economy

4.12 Employment in Epping Forest is driven by its population, with significant concentrations of jobs in sectors serving the local residents such as public administration (including health and education), retail, food services and entertainment/recreation. Growth has been experienced in some of these areas in recent years (in particular education and entertainment/recreation) suggesting a reliance on these sectors. This has been coupled with a decline in higher value sectors such as professional, scientific and technical activities and construction. Employment opportunities created at Latton Priory will be important in reducing reliance on certain sections of the economy and supporting those of higher added value.

Supporting employment growth in key sectors

- 4.13 The potential employment uses within Latton Priory have not yet been established and there is potential for these to respond to market forces and local/sub-regional aspirations.
 - Agriculture and food processing this is a key sector identified by the South East LEP (SE LEP) as an important driver for the area's economy. Our discussion with Epping Forest DC highlighted the historic importance of this sector and the Council's aim to promote its development, for example through the delivery of glasshouses. While the District has a history of food growing, agriculture (-300 jobs) and food manufacturing (static jobs) employment are not projected to grow between 2011 and 2031. There will therefore be a need to proactively support the development of these activities if it is to be a priority sector. Latton Priory could potentially provide a suitable location for such activity.
 - Advanced manufacturing and technology identified in the Essex Economic Growth Strategy as a key sector as well as the SE LEP strategy as a driver for growth. Epping Forest has experienced growth in manufacturing employment in recent years while the research and development sector is forecast to grow by 72% (100 jobs) in the District over the next twenty years. Our discussion with the Council indicated a potential to focus on higher value manufacturing activities, particularly through linkages to strengths in technology around Harlow's MedTech Enterprise Zone and the London-Stansted-Cambridge tech corridor. Latton Priory is ideally located to link into these aspirations as well as providing access to the M11 (the ELR considers that B1c businesses may have a strong business need for good access to the road network).
 - Transport (and port related) activities identified in Essex Economic Growth Strategy
 while logistics is also a driver for growth identified in the SE LEP. This is an important
 sector within the District's economy, with a degree of specialisation, and land
 transport is projected to grow over the next twenty years (700 jobs or 23% growth).
 The site will have prime access to the M11 so could be an ideal location for sectors



requiring land transport.

- Financial and Business Services a key sector for growth across the SE LEP area. Professional and business services are two of the top three growth sectors for the District over the Plan Period (growth of 1,100 and 3,200 jobs respectively) and business services is projected to be the main sector of employment by 2031, employing 9,700 people. The ELR recognises that this will lead to the requirement for additional office space. The scale of delivery possibly at Latton Priory has the potential to deliver all of the B1 employment land (and employment) identified within the ELR.
- Tourism and creative industries identified by SE LEP as a key sector while arts, entertainment and recreation employment in Epping Forest has increased by 45% since 2008. It is also projected to be a growth sector over the Plan Period by 900 jobs. There may be some potential to provide office and workshop based units on site for creative sector functions, though in the main, tourism related activity will be focused within town centres.
- Other sectors other sectors may also be increasingly important for the sustained economic performance of the District. For example, the information and communication sector has recently experienced employment growth in Epping Forest and is projected to grow by 36% (200 jobs) over the next twenty years. Sectors serving the needs of an ageing population, such as health and care, are likely to be in demand in coming years as the population ages and is recognised as a growth sector in the Essex Economic Growth Strategy. This will include office based functions as well as delivery of client-facing care.

Reducing Out-Commuting

- 4.14 The District experiences a high volume of daily out-commuting for employment in London (c.19,000 net out-commuting). The Epping Forest District and Brentwood Borough Employment Land Review (ELR) (September 2010) notes the need to 'minimise commuting and promote more sustainable communities by achieving a closer relationship between jobs and homes'. Due to the reliance on London for employment opportunities for residents, the salaries of those commuting out for work are around 20% higher than earnings of those who work in Epping Forest. Providing higher value jobs will help to retain those with higher skills in the District for employment. The scale of development possible at Latton Priory will also enable a settlement to be developed comprising both jobs and homes thereby encouraging a greater relationship between the two, as aspired to by the Council.
- 4.15 There are also a large number of Harlow residents (2,110) who commute into Epping Forest for work. Additional jobs in the District will help to provide jobs for the growing population of Harlow.

Supporting Business Expansion

4.16 Vacancy levels in Epping Forest are very low (4% of premises and 3% of floorspace)¹⁸ and

¹⁸ Epping Forest District and Brentwood Borough Employment Land Review, Final Report (September 2010) Atkins



there is latent demand for move-on premises in the District. The ELR (2010) identified that 40% of businesses are looking for premises for expansion, particularly medium and large enterprises and those in manufacturing (B1c/B2). Providing these businesses with suitable premises within the District will prevent losing them through relocation elsewhere.

4.17 Based on those sectors projected to increase in employment over the next twenty years, those businesses looking to expand may also include those in business services, construction, professional services, arts/entertainment, land transport and wholesale.

Supporting Enterprise

4.18 Epping Forest has a high rate of self-employment and business start-up, coupled with a high rate of home working. The ELR recommends provision of sites to enable the development of new enterprises, particularly small businesses, so as to meet the need of indigenously generated demand. There could be an opportunity to provide hot-desking and small office space at Latton Priory to meet the needs of these businesses, possibly via an incubator or live-work provision, linked to business support to respond to the above average business failure rate. A number of such facilities have been developed across the country including the Aylesbury Innovation and Enterprise Centre (see text box below) which could be replicated in Epping Forest.

Aylesbury Enterprise + Innovation Centre Case Study

The Aylesbury Enterprise + Innovation (AEI) Centre demonstrates a successfully designed and implemented business support/space model. The Centre provides:

- Office premises with a full range of back-office support services (including meeting room hire) available for lease ranging from a hot-desk arrangement (through their 'campus office space' such as a 1 hour touch-down workstation) or small office space for up to 7 people
- Business start-up guidance
- Assistance with Business Plans/financials and budgeting/marketing and sales approaches
- Access to a variety of training courses and seminars
- Access to themed networking groups, bringing businesses together to share experiences and ideas

The support can be accessed by start-up organisations or those looking to grow. The AEI Centre has helped over 150 businesses in the Aylesbury area.

Benefits of Housing Growth at Latton Priory

Supporting Planning Policy and Meeting Local Plan Aspirations

- 4.19 The SE LEP provides a clear focus on prioritising economic growth, reflecting national priorities. Similarly, the Greater Essex Integrated County Strategy (2010) aims to create a highly performing and competitive economy that makes a significant contribution to UK economic growth and recovery. The Essex Economic Growth Strategy (2012) also aspires to make Essex an economically vibrant and entrepreneurial county where businesses and residents can grow and fulfil their full potential.
- 4.20 Reflecting these aspirations, Epping Forest District Council identifies five aims for the Local Plan, three of which are directly linked to housing and jobs.



Table 4-1 The Benefits of Housing and Employment Growth in Relation to the Local Plan Vision and Aims		
Vision and Aims for Local Plan	Benefits of Housing and Employment Growth	
To manage sustainable growth in the district	Sustainable development is at the heart of the NPPF which identifies three components to achieving this, two of which relate to housing and employment:	
	 Economic – ensuring the right land is available in the right locations and at the right time to support growth and innovation Social – supporting a strong, vibrant, healthy community by providing the supply of homes required and creating a high quality built environment with accessible local services 	
To deliver the right number of houses in the right places	There is a need for a minimum of 15,900 new homes in the district over the next twenty years to meet forecast population growth (more if Harlow's housing needs are considered).	
To support and enhance the economy of the district	Latest projections indicate employment growth of around 8,600 over the plan period. To enable this potential to be achieved, approximately 14,300 homes would be required in the District.	
_	ommunity Choices – Issues and Options for the Local Plan, 012) Epping Forest District Council, p.13; NPPF, 2012; Regeneris	

4.21 There is a clear need for additional homes in the District over the next twenty years and beyond, with the Council identifying between 7,700 and 11,400 homes required and latest government projections suggesting closer to 16,000. Latton Priory provides a substantial site, capable of delivering a large number of homes to meet these needs (between 22 and 32% of target range). The benefit of this is considerable given that deliverability of approximately 70% of the properties referenced in the five-year housing land supply either do not have planning applications or have not yet been started on site.

Assisting Epping Forest DC in responding to the 'duty to cooperate' identified in the National Planning Policy Framework

4.22 The NPPF places a 'duty to cooperate' on Local Authorities to ensure that, where an area is unable to accommodate its housing growth needs within its own boundaries, these needs will not go unmet. Harlow is projected significant growth in coming years but is constrained due to its boundaries. There has been a history of acknowledging this growth following the RSS and the Issues and Options paper and related evidence base suggests that between 3,000 and 4,600 homes may be required to meet Harlow's needs. Being located immediately to the South of Harlow, Latton Priory is ideally positioned to absorb some of this demand.

Meeting the Need of Local Households

4.23 The ELR identifies that between 13 and 17% of households in the Latton Priory area are unsuitably housed, compared to the average of 13% across Epping Forest. A higher still percentage is evident in Harlow. The Community Visioning consultation, which informed the Issues and Options paper, identified a need for affordable housing in rural areas and the Strategic Housing Market Assessment for the London Commuter Belt (East)/M11 Sub Region (2008) identifies a gap in current provision of intermediate housing in the area.

4.24 The site will provide a mix of affordable, intermediate and market properties of varying sizes to help meet the needs of the current and growing population.

Attracting and Retaining a Working Age Population

- 4.25 Over the next decade Epping Forest is projected to experience significant growth amongst older age groups within the population (22% growth amongst those aged 65+) which will not be counterbalanced by growth of those of working age (7%). New homes play an important role in helping to attract and retain residents of working age which are vital in helping to:
 - Provide a labour force for the areas businesses, including those in key service sectors required to meet the needs of an ageing population, such as health and social care which is forecast to grow by 4,200 jobs over the next 20 years in response to the ageing population
 - Enhance the labour pool through a greater volume and scope of skills available which can act to attract inward investment which in turn provides additional employment opportunities
 - Retain and grow spending in the local area. For households where the head is over 75, spend is typically only 50% of that of a household in which the head is aged 30-49¹⁹. A greater number of working age residents will therefore support more local shops and services and in turn jobs.
 - Provide the critical mass needed to sustain local services such as shops (related to point on spend above) and schools.

Supporting Growth of Town Centres

- 4.26 The NPPF places emphasis on the need to sustain the vitality and viability of town centres and recognises the role which housing plays in this. 'Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity' (para 23). The Framework promotes retention of community facilities, shops and services which are of value to the local residents.
- 4.27 There has been some decline in local town centres in Epping Forest as well as Harlow in recent years as a result of leakage of expenditure (including to national retail centres such as Stratford Westfield) and a lack of critical mass to support shops and services locally. The Issues and Options paper acknowledges that Waltham Abbey in particular has struggled to maintain its vitality and viability while Loughton, Debden and Epping have all fallen in the national ranking since 2000. Development potential in Epping and Debden has been identified though there will need to be a critical mass to ensure a threshold of visitors to prompt development.
- 4.28 The development at Latton Priory will contribute up to an estimated £19.6 million gross expenditure per annum on everyday goods and services in the District which will help to

¹⁹ Living Costs and Food Survey (2011) ONS





support existing shops and services locally. Expenditure benefits will likewise be experienced by Harlow. It will also contribute to the critical mass required to prompt market delivery of better quality shops and independent stores which was identified as a desire within the Town Centres Strategy. This is particularly the case given that new private sector homes tend to be occupied by those in middle and higher socio-economic groups²⁰.

Supporting Infrastructure

- 4.29 There are a number of ways in which the development may support infrastructure within Epping Forest and Harlow:
 - The scheme includes the creation of Junction 7a of the M11. This will improve the traffic network and is identified as key infrastructure provision within the Issues and Options paper.
 - There are plans to include social and community facilities within the scheme such as
 facilities for primary education. This will help to meet the needs of the Latton Priory
 residents and may also form an important element of supply of services for the local
 rural community in the vicinity.
 - The scheme will be subject to **development obligations**, for example through the New Homes Bonus, Section 106 or Community Infrastructure Levy which can be used by the Epping Forest District Council to invest as appropriate to meet the infrastructure needs of the local and wider population. For example, the Issues and Options paper recognises the need for an improved broadband network and community services within rural areas which it suggests will be implemented via use of the Community Infrastructure Levy. The forthcoming Infrastructure Delivery Plan for the District will guide how these funds will be spent. Previous analysis within the CEG/HLM economic impact paper estimated the following:
 - New Homes Bonus (NHB) payments of £4.4 million per annum or £26.5 million over the six-year payment period²¹
 - Additional annual Council Tax payments of £4.1 million per annum in perpetuity
 - Generation of approximately £4.1 million in business rate revenue per annum of which an estimated £2.0 million will be available for the local authority.

²¹ Note that the government has proposed pooling 35% of NHB for use by LEPs





²⁰ Leishman et al (2004) Preference, Quality and Choice in New-Build Housing, Joseph Rowntree Foundation

5. Conclusions and Next Steps

5.1 This document clearly sets out the benefits of developing the Latton Priory site. It is evident that there is significant potential for development at this site to make a significant contribution towards the planning and economic development priorities for Epping Forest District and these are summarised below:

Realising the Benefits of Housing and Employment Growth within Epping Forest through Delivery of Latton Priory

Specifically, Latton Priory can:

Employment

- Deliver all of the employment land required in the District to meet employment growth as identified in the Issues and Options paper (up to 15ha can be provided compared to 8.7ha required)
- Fulfil approximately 55% of the jobs growth target identified in the Issues and Options paper through direct on site jobs (approximately 2,170 Full Time Equivalent positions in B class uses as well as jobs in retail and services within local service centre)
- Provide local employment opportunities which may mitigate the high level of out-commuting and diversify the employment offer of the District (with the potential to increase higher value activities in the area)
- Provide a sufficient scale of employment land to:
 - deliver the necessary hectares required for a range of business types from office to food production
 - enable business clusters (in any sector) as recommended in the ELR
 - meet business expansion needs, both of the 40% of medium and larger businesses in the District requiring move on space as well as to meet the needs as those located at Latton Priory grow
- Have direct access to the M11, ideal for B1c, B2 and B8 businesses

Housing

- Deliver between 22 and 32% of the District's housing target as identified in the Issues and Options paper
- Help the Council deliver against its 'duty to cooperate', especially with Harlow
- Provide affordable, intermediate and market housing in an area of identified need
- Provide a development of a sufficient scale to ensure sustainability through provision of jobs, homes, shops and services
- Support viability of local shops and services in the surrounding area through injection of additional resident spend and the necessary critical mass
- Strengthen the local labour force through a new population, which in turn can support local businesses as well as attract inward investment

Infrastructure

- Deliver a new junction (Junction 7a) on the M11 thereby improving the local traffic network
- Provide new shops and services to meet the needs of the local population, including new primary schools
- Provide £26.5 million in New Homes Bonus Payments and £4.1 million per annum in Council Tax payments
- Generate approximately £2.0 million in business rate revenue per annum for the local authority.



Next Steps

- 5.2 This paper is informing initial discussions with the council regarding the potential of development at Latton Priory. However, it is recognised that further work is required to agree the exact role and potential which exists on site. Further work may be required and this could include the following:
 - More detailed research into specific uses which could be developed on the site. This could include:
 - Identifying future employment land needs for the district and understanding how Latton Priory can meet these needs; and,
 - Understanding the key sectors and uses which could be developed on site and how this fits with the council's strategy for the area. This could identify the potential for part of the site to accommodate key priority sectors or enterprise uses.
 - More detailed research to understand the benefits for Harlow DC:
 - This will develop an understanding of the key issues for the area and opportunities for Harlow DC.

Appendix AEconomic Policy Assessment

National Policy

The prolonged economic downturn has had a profound effect on the UK and local economies. Aside from the overarching impact on the national and local economic performance, the economic downturn has contributed towards significant changes in the political and strategic landscapes, with significant implications for the local economy.

Following the 2010 election, the Coalition Government's Plan for Growth (2010) was published with the stated aims of achieving a strong, sustainable and balanced economic growth across Britain. This was based upon an assessment that the national economy has become too focused on a small number of sectors, and concentrated around a few regions of the country. The Plan for Growth's main ambitions were to (1) create a more competitive tax system; (2) making the UK a better place to start, finance and grow a business; (3) encourage investment; and (4) create a more educated workforce.

To achieve these ambitions and create new jobs, the Government has introduced several changes in the planning system by including a presumption in favour of any development considered sustainable. This is nowhere more evident than in the National Planning Policy Framework (NPPF) (2012) which states that planning has an economic role of contributing to building a strong, responsive and competitive economy by ensuring that sufficient land of the right type is available, in the right places and at the right time to support local growth.

The NPPF's (2012) stance in favour of sustainable development is based on the three dimensions of sustainable development the planning system can play. These are:

- **Economic role:** the planning system is able to perform an economic role by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation.
- **Social role:** the planning system is able perform a social role through supporting a strong, vibrant and healthy community by providing the supply of housing required and creating a high quality built environment with accessible local services that reflect the community's needs as well as social and cultural well-being.
- Environmental role: the planning system can contribute to protecting and enhancing our natural, built and historic environment whilst helping to improve biodiversity, use natural resources prudently, and minimise waste and pollution.

The Government is also advocating a greater shift towards localism. The **Localism Act 2011** (2011) aims to provide a substantial and lasting shift in power away from Central Government towards local people. The **Localism Act 2011** identifies *Local Plans* as the key to delivering development that reflects local communities' visions and aspirations. The **Localism Act 2011** seeks to give Local Authorities everywhere a greater confidence to respond to local people's needs by making it easier for them to take over the amenities they love and keep them part of their local life.

Regional and Sub-regional Policy

At a sub-national level, the most significant strategic development in recent years has been the abolition of the Regional Development Agencies (RDAs) and the creation of Local Enterprise Partnerships (LEPs) as part of the localism agenda. Of particular relevance to Epping Forest is the South East LEP (SE LEP) covering Essex, Kent and parts of East Sussex. The SE LEP's vision is for the sub-region to be "the most enterprising economy in England", and to achieve this has set two core priorities of "exploring and creating opportunities for enterprise" and "addressing the barriers to growth".

Additionally, the **Greater Essex Integrated County Strategy** (2010) and the **Essex Economic Growth Strategy** (2012) set out a number of overarching economic objectives for the County. The **Integrated County Strategy** aims to create a highly performing and competitive economy that makes a significant contribution to UK economic growth and recovery, whilst providing for the successful regeneration of Essex communities and a high quality of life for its residents and employees. Similarly, the **Economic Growth Strategy** aspires to make Essex an economically vibrant and entrepreneurial County where businesses and residents can grow and fulfil their full potential.

The **Integrated County Strategy** also aspires to create a balanced pattern of, and sustainable, growth by ensuring that the provision of housing is matched with jobs and services, particularly in high-growth areas. It presents key towns in Essex as an opportunity to build on their role as key economic centres, promoting their self-containment, and cementing their economic vitality by supporting growth with a focus on investment around stimulating the economy and improving infrastructure.

The **Essex Economic Growth Strategy** indicates that with the County's excellent air, sea, road and rail transport links, and its proximity to London, the Greater South East and the rest of Europe, Essex is very well placed to share in the overall growth of Europe's economy. Some of the sectors identified as having significant potential for growth across Essex include advanced manufacturing and technology, transport and port-related activities, renewable energy and low carbon technology, as well as health and care.

Local Policy

Following guidance set out in the **National Planning Policy Framework** (2012), Epping Forest District Council is in the process of producing its Local Plan, and is currently finalising its response to the **Issues and Options for the Local Plan Consultation Document** (2012).

The District's most recent planning-related policies can be found in the **Combined Policies of Epping Forest District Local Plan (1998) and Alterations (2006)** published in 2008. One of its aims was to meet the employment needs of the unemployed whilst achieving a mix of local employment and commercial activities that both meet local needs and reduce the need to travel using the private car. This plan argues that development and economic growth in Epping Forest is to be accommodated in a sustainable manner, seeking to achieve a better balance between housing and employment provision within different local areas.

The **Combined Local Plan (1998) and Alterations (2006)** however, ceased to be operational in April 2013, and will in due course be superseded by a new *Local Plan*. In its **Business Plan** for 2013 and 2014 Epping Forest District Council reports that the new business plan will aim to support the provision of homes and employment within the District in addition to monitoring the green and rural character of the District.

As part of the process for developing a new *Local Plan*, Epping Forest District Council published and **Issues and Options Paper** (2012) for an 11 week consultation in July 2012. Although this paper does not make any policy recommendations, it puts forward a vision to "protect and enhance green spaces whilst encouraging appropriate levels of growth to provide for the housing, employment and social needs of the District". Its aims are to manage sustainable growth within the district as well as enhancing the local economy.

The Issues and Options Paper (2012) acknowledges that no allocations for large-scale development have been made since the adoption of the Combined Local Plan (1998) and Alterations (2006) was published, and that the development opportunities within the District's existing urban boundaries are rapidly running out. Consultations with local residents have identified that encouraging local jobs and businesses is one of the highest priorities for Epping Forest.

In addition, the **Issues and Options Paper** (2012) recognises that there is a need for more housing within Epping Forest, and that there is insufficient land within the current policy designations to meet the District's needs, even if the lowest housing and employment land targets were to be chosen. This means that some changes to existing designations will be necessary.

Evidence Base

Key documents from the Council's Core Strategy evidence base which are of relevance to this study are detailed below. It should be noted that Epping Forest District Council is intending to publish a number of updated reports in Autumn 2013 including an updated ELR, economic and population forecast analysis and an economic development strategy. These were not available at the time of writing but will be important in influencing the economic direction of the Local Authority.

Employment Land Review

The Epping Forest District and Brentwood Borough Employment Land Review (2010) looked at analysing the future demand for employment land within Epping Forest and Brentwood to 2031. It identified that employment in Epping Forest is dominated by three sections – distribution, hotels and restaurants; banking and finance; and public services. This study forecast a net growth of 1,000 jobs in Epping Forest requiring 5.83 ha of employment land by 2031. It also identifies that around two-in-five businesses within Epping Forest are looking to expand, requiring additional floorspace which was unavailable at their existing premises.

Strategic Housing Market Assessment

The District and Borough Councils of Brentwood, Broxbourne, East Hertfordshire, Epping Forest, Harlow and Uttlesford commissioned a **Strategic Housing Market Assessment** for the **London Commuter Belt (East) / M11 Sub-Region** in 2008. This study identifies that across the whole strategic housing market area, a total of 2,430 dwellings per annum are to be delivered until 2021 in order to meet housing requirements in the area. The total annual requirement for Epping Forest is set at 175 dwellings per annum. However, due to the District's ability to successfully deliver upon its housing requirements between 2001 and 2006, the SHMA suggests that Epping Forest needs only deliver 150 dwellings per annum until 2021.

Some of the drivers of change affecting the housing market identified in the **London Commuter Belt (East) / M11 Sub-Region SHMA** (2008) include demographic change, especially an increase in the number of people aged 65 and over, commuting patterns – especially in and out of London and different economic factors. This report is fairly dated (it was published in 2008 before the negative impacts of the economic downturn were felt), however it identifies an absence of market housing options that are affordable to households with incomes of less than £30,000.

In addition, the SHMA reports that there will be a long-term shift to private renting, with the proportion of households who are home owners likely to fall. It is very likely that this proportion has fallen more as a result of tighter lending controls following the recession. Finally, this study identifies a gap in housing provision for households that can afford more than social rent, but cannot afford market housing, commonly referred to as intermediate affordable housing tenure.

Town Centres Study

The **Epping Forest Town Centres Study** (2010) looked at six town centres²² within Epping Forest District, and analysed their vitality and overall viability while examining their role and function vis-à-vis higher order centres outside the District.

This study proposed a revision of the District's hierarchy of centres (identifying Epping and Loughton High Road as town centres, and the others as small district centres), and identifies a quantitative need of 62,300 sq. metres of A1-A5 uses between 2009 and 2031²³.

The report included a visitor satisfaction survey, the results of which are a reflection of the accessibility of the centres and their general retail offer. Introducing better quality and independent shops was suggested by a number of respondents.

In addition the **Town Centres Study** (2010) included a retail needs assessment. This assessment identified a high amount of expenditure leakage in both the comparison and convenience sectors. It suggests that this is due to a lack in the "critical mass" and diversity of retail development in the different local areas, failing to attract consumers on a regular basis throughout the year. It is appreciated that larger centres usually attract more trade, however it is also suggested that smaller centres (such as those in Epping Forest) have a sufficient range of shops and services to meet the needs of their local population on a regular basis.

²³ Need between 2009 and 2016 = 23,400 sq. metres; need 2016 to 2021 = 12,600 sq. metres; and need 2021 to 2031 = 26,300 sq. metres.





²² The six town centres reviewed in this study were Epping, Loughton High Road, Waltham Abbey, Loughton Broadway, Chipping Ongar and Buckhurst Hill.



APPENDIX 4 – GREEN BELT BOUNDARY PROPOSAL PLAN (BROADWAY MALYAN)



Contractors are not to scale dimensions from this drawing

Site Boundary area - 154.99 ha

SP 5.1 allocation - 100.68

Green belt boundary Proposal

EFDC Green belt boundary

Green belt area within SP5.1 - 30.10 ha

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CEG/Hallam Land

Latton Priory

Harlow

Green Belt boundary proposal

30422

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