

Haven Gateway Partnership



Suffolk Haven Gateway Employment Land
Review & Strategic Sites Study

Appendix 3: Strategic Sites Study

October 2009

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1. INTRODUCTION

BACKGROUND TO COMMISSION

- 1.1 The three local authorities of Babergh, Suffolk Coastal and Ipswich comprise the Suffolk Haven Gateway area identified in the Regional Spatial Strategy (RSS). Policy E1 of the RSS guides the overall job targets for the period to 2021, establishing some ambitious expectations both in terms of quantum, but also when read in conjunction with the Regional Economic Strategy (RES), the mix and choice of employment opportunity.
- 1.2 The role and function of the Suffolk Haven Gateway area within the overall regional economy is an important issue. For the East of England to have a successful and growing economy there must be a good choice, quality and mix of employment opportunities (and therefore employment land) if the Sustainable Communities growth agenda (established in Planning Policy Statement 1(PPS1)) is to be delivered. Suffolk Haven Gateway can make a substantial contribution to this agenda, with an economic offer that is reflective of regional growth ambitions, but also accounts for the traditional economic role and function and local distinctiveness of the three local authorities.
- 1.3 The Suffolk Haven Gateway has a growth target of 30,000 new jobs; a significant portion of the 53,000 targeted for the entire County of Suffolk. The employment targets raise a number of issues and challenges for the three local authorities. This is in terms of the provision of a choice and quality of employment space, the breakdown of the overall jobs targets to identify more precisely the role of B Class uses and non-B Class uses in providing employment opportunities, and the relative economic roles and functions to be played by the individual authorities in the urban and rural areas.
- 1.4 Within this context GVA Grimley was commissioned by the Haven Gateway Partnership to undertake an Employment Land Review and Strategic Sites Study for the Haven Gateway Suffolk sub-region.
- 1.5 The commission follows EEDA's Employment Land Review Guidance Manual (March 2008), to provide each local authority with:
 - An assessment of land requirements over their plan period, taking into consideration market conditions and policy objectives (both locally and strategically);
 - An assessment of land supply

- A comparison of supply and demand using both qualitative and quantitative methods;
- Future land allocation requirements and justification;
- Policy recommendations for retention/release of employment land specific to each site and identification of new sites where necessary along with provision of effective timescales

PURPOSE OF REPORT

1.6 Within the Suffolk Haven Gateway sub-region there are seven Strategic Employment Sites to be given specific consideration in this study. Given the requirements of the client group for early recommendations on these Strategic Sites the purpose of this report is to provide our initial assessment and preliminary recommendations for the following Strategic Sites, to be revisited and considered further within the main Employment Land Review.

- Adastral Park, Martlesham (Suffolk Coastal DC)
- Brantham Industrial Site, Brantham (Babergh DC)
- Former British Sugar Site, Sproughton (Babergh DC)
- Wherstead (former E-On HQ), Wherstead (Babergh DC)
- Ransomes Europark, Ipswich (Ipswich BC)
- Cranes Site, Ipswich (Ipswich BC)
- Rendham Road, Saxmundham (Suffolk Coastal DC)

STATUS OF REPORT

1.7 This report forms an appendix to the Haven Gateway Employment Land Review. It makes reference to the Strategic Employment Site Report undertaken by ARUPs, completed in May 2009 on behalf of the East of England Development Agency (EEDA).

STRUCTURE OF REPORT

1.8 The remainder of this document is structured as follows:

- Chapter 2 provides the geographical and policy context of the study area;
- Chapter 3 provides the commercial property market review for the three local authority areas; and

- Chapter 4 provides the initial assessments and emerging conclusions relating to each Strategic Site.

2. STRATEGIC SITES CONTEXT

POLICY ALIGNMENT

A Focus on 'Knowledge' – the Lisbon Agenda

- 2.1 The Lisbon Agenda originated at a summit of European Union's twenty-five political leaders in Lisbon, Portugal, in March 2000. The Lisbon Agenda focused upon economic reforms to encourage the competitiveness of the EU member states, particularly in light of the economic success experienced in the USA at the time.
- 2.2 Development of the 'learning economy' is a central theme to this agenda, referring to the enhanced production of knowledge with associated higher value economic growth, through the development of knowledge-based economic activity.
- 2.3 The original Lisbon Agenda (2000) set a series of targets for developing the 'learning economy' (knowledge driven business and employment activity) to be monitored and reviewed across Member States. These relate broadly to the four themes of *employment, innovation, enterprise, and environment*. The goal was accordingly set for 2010 to make the EU the "...most dynamic and competitive knowledge-based economy in the world". This position was later updated in the 2005 *Lisbon Strategy for Growth – UK National Reform Programme* (NRP).
- 2.4 A more recent policy development nation wide is however provided by the *National Strategic Reference Framework* (NSRF) (2006) which sets out the UK Government's framework for use of Structural Funds available. This document forms the 'bridge' between the EU and regional policy positions.

The East of England Regional Response

Regional Economic Strategy

- 2.5 The Regional Economic Strategy (RES) for the East of England is a 20 year plus strategy (2008 to 2031) charged with directing the future economic growth of the region.
- 2.6 The RES states the successes within the regional economy over the last 20 years, which has contributed to the attractiveness and population growth in the East of England over the period. However, it also notes that continued success is not guaranteed, and specifically references

the slowdown in economic growth over the most recent 5 year period, which saw the regional average lagging behind that of the nation. This position was stated in advance of the current recession which will pose further challenges to the regional economy.

- 2.7 The economy is summarised to be characterised by disparities in economic activity, income levels, contribution to productivity, and investment potential. For example, whilst on aggregate the region is seen to perform well in terms of economic activity, some local areas (including Waveney in Suffolk amongst others) experience high and persistent unemployment and economic inactivity rates.
- 2.8 The RES vision is that by 2031, the East of England will be:
- Internationally competitive with a global reputation for innovation and business growth;
 - A region that harnesses and develops the talents and creativity of all; and
 - At the forefront of the low-carbon and resource-efficient economy.
- 2.9 It also aspires for the region to be known for:
- Exceptional landscapes, vibrant places and quality of life; and
 - Being a confident, outward-looking region with strong leadership and where communities actively shape their future.
- 2.10 Some key overarching ambitions for the region embedded within the RES in the context of this piece of work include achieving: annual growth in real workplace-based GVA over 2008 to 2031 of 2.3% per capita and 2.1% per worker; working-age population employment rate of 80%; proportion of working-age population with NVQ level 2 or equivalent qualification and above at 90%.
- 2.11 The RES recognises that the key challenges across the region over the strategy period are to raise rates of productivity growth, increase entrepreneurship and to better manage the impacts of economic success in terms of economic participation and environmental quality.
- 2.12 Key priorities include:
- Strengthening the regions enterprise culture, and encouraging and nurturing small business growth and performance;
 - Promote innovation including commercialising R&D, strengthening clusters around leading private sector R&D companies and research-intensive universities;

- Investing in skills and capabilities, and infrastructure, to deliver an accelerated use of digital technologies, including sector specific opportunity within ICT businesses;
- Promoting and delivering a low- carbon, low-resource economy, including becoming a leading region in sustainable energy production, and maximising the potential associated with increasing the regions share within the environmental goods and services markets;
- Developing skills for the changing economy including increasing the demand for higher level skills, and creating an appropriate culture where people aspire to learn and facilities that meet needs of individuals and the economy;
- Increasing participation in the 'sustainable economy' including disadvantaged communities, and promotion of flexibility; and
- Ensuring a transport system that fully supports sustainable economic growth including higher levels of economic containment, a resilient transport system, investment in transport infrastructure to maximise economic growth, and increasing economic benefits of major international gateways.

2.13 The Haven Gateway sub-region is recognised within the RES to be an 'Engine for Growth'. It is identified to be one of the key international gateways to the UK. Strategic ambitions for the area are identified to include:

- Development of a next-generation 30-acre science-based business park at Martlesham, with the real potential both to create over 1,100 high-value jobs and provide future stability in the sector;
- Expand the international port functions of Haven Gateway, including expansions at Felixstowe South and Bathside Bay;
- Carry out major reinvention of city and town centres, including Ipswich waterfront, East Colchester, Harwich and regeneration priorities such as Jaywick;
- Develop cultural infrastructure of national and regional significance, such as an International Centre of Excellence for Classical Music at Aldeburgh, firstsite:newsite visual arts facility in Colchester and DanceEast as part of the Cranfield Mill development in Ipswich;
- Strengthen the research excellence and resultant commercialisation at the University of Essex through the development of Colchester Research Park and increased knowledge transfer activity;

- Improve capacity and address constraints on strategic road and rail routes connecting the Haven Gateway to national markets, including the Felixstowe-Nuneaton rail route, Great Eastern main line, A12, A120 and A14;
- Preserve and enhance the sub-regions landscape biodiversity; and
- Continue to develop University Campus Suffolk as a driver of a highly skilled workforce and applied research in the sub-region.

East of England Competitiveness Operational Programme 2007 – 2013

- 2.14 The East of England Competitiveness Operational Programme (EECOP) has been developed by regional partners to direct European funding. It sets out the programme (ERDF) priorities over the period to 2013, and in this context targets Lisbon related development and investment across the region. The total ERDF funding available to the East of England region over this period is 110 million euros (at current prices at the time the document was published), equivalent at the time to £94 million.
- 2.15 The EECOP has two overarching (and inter-related) imperatives for the programme as a whole to 2013:
- Making the knowledge economy work better to create more, higher quality, jobs in the context of unprecedented levels of planned growth; and
 - Delivering the growth agenda in a manner that is cognisant of the region's carbon footprint and the need to stabilise and reduce it.
- 2.16 Responding to the relatively limited resources available to the region under this programme (set in the context of recognised need) the EECOP focuses on those areas where greatest 'value added' (impact) can be generated. The three priority axes are:
- Promoting innovation and knowledge transfer with the intention of improving productivity;
 - Stimulating enterprise and supporting successful business by overcoming business creation and expansion; and
 - Ensuring sustainable development, production and consumption.

East of England Regional Spatial Strategy

- 2.17 The East of England Regional Spatial Strategy (RSS) aligns with the RES through its promotion of dynamic areas and sectors, and growing clusters, that will continue to lead the region's economic progress and competitive advantage, while promoting a step change in

employment growth, development and diversification in underperforming locations, particularly priority areas for regeneration.

- 2.18 RSS requires that Local Development Documents (LDD's) should identify readily-serviceable strategic employment sites of the quality and quantity required to meet the needs of businesses identified through employment land studies. It states that strategic employment sites should be identified within the Haven Gateway to support growth and regeneration at Colchester and Ipswich, including the latter's role in ICT, and development associated with port expansion at Harwich and Felixstowe.
- 2.19 Guidance is also given on clustering potential across the region including the need for LDD's to support the sustainable and dynamic growth of inter-regional and intra-regional sectors and business clusters including specifically the energy cluster on the Norfolk / Suffolk coast, and the ICT / telecommunications cluster around Ipswich.
- 2.20 Further to this, RSS supports the need for LDD's to provide guidance for locally important clusters by:
- Ensuring the availability of a sufficient quantity, quality and choice of sites including provision for incubator units, grow-on space and larger facilities for established business clusters;
 - Addressing accommodation needs close to key institutions, such as universities; and
 - Addressing the need for user restrictions to secure the use of premises for specific activities.
- 2.21 In order to deliver the jobs target set within RSS, the Haven Gateway local authorities are required by the guidance to promote a competitive sub-regional business environment through:
- Supporting the maintenance and appropriate expansion of the ports, maritime and related activities, recognising the role that they play in making the sub-region a major economic growth point and approved proposals for container handling capacity at Bathside Bay and Felixstowe South;
 - Promoting the urban areas of Colchester and Ipswich as major centres of employment;
 - Providing appropriate sites, premises and infrastructure to attract a diverse range of employment to Ipswich, Colchester, Harwich, Felixstowe and Clacton; and

- Regeneration initiatives in Colchester (St Botolphs, North Station, East and North Colchester and the Garrison), Ipswich Waterfront and Village, Felixstowe (including measures to address its failing status as a resort), Harwich, Clacton, Jaywick and smaller scale projects elsewhere, with a focus on employment diversification and other social aims as well as physical renewal.

2.22 RSS recognises that the economic structure of the area is diverse, principally based on:

- A concentration of transport and logistics industries related to the internationally important Haven Ports;
- Expanding cultural, tourism and marine leisure industries;
- The diverse economies of Ipswich and Colchester with a substantial service sector based on administration, insurance, financial and professional services;
- Academic institutions, including Essex University, the proposed Essex University Science Park, and the new University Campus Suffolk on Ipswich Waterfront.

ECONOMIC AND INVESTMENT OUTLOOK

2.23 The nature of the economy in Haven Gateway Suffolk is an important factor in understanding the future role and potential of Strategic Employment Sites within the sub-region. While the overall objective of an Employment Land Review (ELR) is to forecast future demand by broad sector it is important to assess at this stage individual existing sector strengths related to the Strategic Sites to set the context of potential future employment within them.

2.24 To do this each local authority's current sector strength is assessed by using Location Quotients (LQs) compared to the East of England.

2.25 LQs compare the relative size of a sector in one area against relevant comparator areas (in this case the East of England). A location quotient above 1 indicates that the sector contributes more to the total employment in the local authority area than to the East of England. This is an indicator that the local authority area might provide a locational advantage for this specific sector. A quotient of below 1 indicates a relatively lower contribution to the total employment of a sector in the local authority area compared to the East of England.

Sector Strength

Suffolk Coastal

- 2.26 Using this approach outlined above we have analysed those sectors which have a strong location quotient and have experienced growth since 1998 in each local authority to give an indication of those sectors that are most likely to prosper in the future. This is shown in **Error! Reference source not found.** below.

Table 1 Sectors with future growth potential in Suffolk Coastal

Sector	LQ	Growth 98 -07	Current Number of Employees
Electricity, gas, steam and hot water supply	27.1	625%	5,687
Water transport	8.1	1%	278
Supporting and auxiliary transport activities; activities of travel agencies	4.7	3%	4,728
Land transport; transport via pipelines	2.2	6%	2,269
Hotels and restaurants	1.1	16%	3,499
Sewage and refuse disposal, sanitation and similar activities	1.1	70%	223
Real estate activities	1.1	135%	925

Source: ABI 2007

- 2.27 Table 1 shows the influence of the Port of Felixstowe in Suffolk Coastal particularly around the transport sectors indicating the opportunity for these sectors in the future. This type of activity is a clear opportunity for the Strategic Sites within the District as well as the wider Suffolk Haven Gateway.

Ipswich

- 2.28 A similar analysis for Ipswich Borough is shown in Table 2 overleaf.

Table 2 Sectors with future growth potential in Ipswich

Sector	LQ	Growth 98-07	Current Number of Employees
Water transport	4.4	31.8%	195
Activities auxiliary to financial intermediation	4.4	35.6%	2,705
Insurance and pension funding, except compulsory social security	3.7	4.6%	2,259
Electricity, gas, steam and hot water supply	3.3	11.9%	893
Public administration and defence; compulsory social security	1.9	32.7%	5,857
Supporting and auxiliary transport activities; activities of travel agencies	1.5	86.1%	1,898
Health and social work	1.4	27.2%	10,403
Financial intermediation, except insurance and pension funding	1.3	7.6%	1,062

Source: ABI / GVA Grimley

- 2.29 Table 2 shows that Ipswich also has a strong representation in the transport sector indicating the influence of the Port of Felixstowe. Additionally, the strong presence of the insurance sectors and associated financial services indicates influence on the nature of the Borough's employment. Reflecting the position of Ipswich as an administrative centre with its associated services, public administration and health and social work have a high LQ within the Borough.

Babergh

- 2.30 An sector analysis in Babergh District is shown in Table 3 overleaf.

Table 3 Sectors with future growth potential in Ipswich

Sector	LQ	Growth 98 -07	Current Number of Employees
Water transport	4.70	1483%	95
Manufacture of wood and products	2.69	24%	255
Agriculture, hunting and related service activities	2.24	4%	935
Manufacture of other non-metallic mineral products	1.75	11%	168
Hotels and restaurants	1.19	8%	2,140
Wholesale trade and commission trade, except of motor vehicles and motorcycles	1.19	36%	1,742
Other business activities	1.14	126%	4,373
Manufacture of electrical machinery and apparatus not elsewhere classified	1.13	130%	147
Other service activities	1.10	27%	434
Manufacture of pulp, paper and paper products	1.09	31%	76
Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	1.04	10%	3,626
Construction	1.01	26%	1,702

Source: ABI / GVA Grimley 2007

- 2.31 Babergh has a stronger industrial focus than the other local authorities in Suffolk Haven Gateway illustrated by the LQ analysis. There are a number of particular manufacturing activities which perform strongly in the District. Water transport is also strong within the District confirming the Port of Felixstowe's influence throughout Suffolk Haven Gateway.
- 2.32 There is also a strong presence of the business activities sector and an initial investigation indicates that the presence of Philips Avent in Glemsford is a major factor behind this strong presence.

3. STRATEGIC SITES CRITERIA

CONTEXT

- 3.1 In response to the need to test the appropriate and deliverability of identified strategic sites across the Suffolk Haven Gateway a strategic sites criteria has been developed. This criteria has been developed to initially test the seven sites identified by partners across the sub-region previously but also tests the wider supply of employment land in terms of its alignment with strategic priorities.
- 3.2 The development of the criteria reflects a new approach to identifying regionally, and sub-regionally significant employment land across the Suffolk Haven Gateway including each sites potential contribution to sectoral and regeneration priorities over the next plan period. The criteria respond directly to strategic policy aspirations as set out in the previous section, including sectoral but also geographical areas that should be considered priorities for investment (and employment development) in the future.
- 3.3 The seven sites considered initially within this analysis are identified to include the following:
- [Aadal Park, Martlesham \(Suffolk Coastal District Council\)](#);
 - [Brantham Industrial Park, Brantham \(Babergh District Council\)](#);
 - [Former British Sugar site, Sproughton \(Babergh District Council\)](#);
 - [Wherstead \(former E-On HQ\), Wherstead \(Babergh District Council\)](#);
 - [Ransomes Europark, Ipswich \(Ipswich Borough Council, Suffolk Coastal District Council\)](#);
 - [Cranes Site, Ipswich \(Ipswich Borough Council\)](#); and
 - [Rendham Road, Saxmundham \(Suffolk Coastal District Council\)](#).
- 3.4 The brief recognises the need to specifically consider the deliverability of these seven sites in addition to their alignment with regional aspirations. A study has been undertaken by ARUPs into the Strategic Sites across the region. The findings of this study have been factored into the consideration of strategic sites within this ELR, and recommendations emerging.

DEVELOPING THE CRITERIA

3.5 A criteria for testing the potential strategic contribution of the seven identified sites has been developed in the context of policy and economic aspirations for the sub-region. The core components of the criteria are:

- Broad location;
- Sectoral clustering potential (including scale);
- Amenity and skills alignment; and
- Site constraints and development feasibility.

BROAD LOCATION

3.6 The criteria assumes that strategic sites (of either regional or sub-regional scale) should be located within broad locations aligned with those identified in strategic policy documents. This includes those within regional, sub-regional, and local policy (current and emerging), including specific locations but also proximity to key drivers (ports, transport hubs, catalysts for activity).

3.7 This criteria is considered to be the initial filter for sites. It is relatively prescriptive and therefore open to only limited interpretation. The broad locations are summarised in the table below, and in Plan 1 in Appendix 1.

Figure 1: Broad Locations

Major Economic Drivers	Regeneration Priority Areas	Growth Areas (linkages / proximity to)
Ipswich Policy Area	Coastal settlements	Key Education Facilities
A14 Corridor	Rural areas	Ports (Felixstowe, Harwich)
Felixstowe		Science and R&D catalysts
		Existing Sectoral Clusters
		Major Planned Investment
		Strategic Transport Hubs

3.8 Strategic policy including the RES and RSS include specific reference to economic drivers (or opportunities) and regeneration priority areas across the Haven Gateway including the Ipswich Policy Area, the A14 Corridor, Felixstowe (including its significance as a failing coastal resort – as identified in strategic policy), and rural areas / towns / market towns which should be reflected in identification of strategic employment sites in this context.

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- 3.9 There are a number of identified growth assets across the region, both specific assets (geographical) and thematic. These are identified to include: priority sectors, Higher and Further Education facilities, the Ports of Felixstowe and Harwich, relationship with the rural economy (i.e. relationship to e.g. market towns), and science and Research & Development catalysts (including key occupiers).
- 3.10 These should be treated as 'triggers' for growth (employment development) across the Suffolk Haven Gateway that should be recognised and maximised through the development of strategic sites. This includes the opportunity to build on existing public sector funding across the sub-region.
- 3.11 In the context of aspirations to promote growth within the knowledge economy, and port-related activity, it is recognised that existing clustering (primarily within priority sectors), key education facilities (including those undergoing investment programmes), ports, strategic transport hubs, science and Research & Development catalysts (major occupiers), major planned investment (notwithstanding previous 'triggers' that may be receiving investment under existing programmes), and strategic transport hubs (in this context road and rail given the aspiration to promote port related activities), are all drivers of potentially strategically significant employment activity.
- 3.12 Plans 2 to 5 in Appendix 1 illustrate sector clustering within the local economy relating to logistics / freight / port-related activities (transport, port and telecommunications), and knowledge-economy activities including business services and finance and insurance.
- 3.13 Key education facilities / specific cluster opportunities are identified to include those listed below and illustrated on Plan 1 in Appendix 1:
- UCS Otley and Otley College, Otley, Ipswich;
 - UCS Ipswich Waterfront, Ipswich Waterfront Building;
 - UCS St Edmund House Offices, St Edmund House Offices;
 - University of Essex, Wivenhoe Park, Colchester;
 - Harwich Adult Community Learning Centre, Dovercourt, Harwich;
 - Essex Biomedical Sciences Institute (Colchester Hospital), Turner Road, Colchester;
 - Essex Biomedical Sciences Institute (Ipswich Hospital), Heath Road, Ipswich;
 - Proposed Colchester Research Park, Wivenhoe Park, Colchester;
 - Suffolk New College, Ipswich, Suffolk; and
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- [Adastral Park, Martlesham Heath, Ipswich.](#)
- 3.14 The RES identifies both the Felixstow-Ipswich-Cambridge-Huntingdon-Kettering/Nuneaton (the A14 and Felixstowe-Nuneaton rail corridor) and the London-Chelmsford-Colchester-Ipswich-Norwich (A12, Great Eastern main line) as being key strategic economic corridors within the East of England. Plan 6 within Appendix 1 illustrates railway hubs, including a 20 minute walk-time buffer around stations.
- 3.15 Plan 7 within Appendix 1 illustrates deprivation as measured by the Index of Multiple Deprivation (2007), with the assumption that employment sites can make a strategic contribution in areas of regeneration need.

SECTORAL CLUSTERING POTENTIAL

- 3.16 Of all the criteria considered this is considered to be the most difficult to define in any strategic planning policy sense, and therefore to predict and provide for. Review of empirical evidence and literature suggests that knowledge-based businesses are not homogenous in their activity or decision making / locational preferences. Indeed, location and property specific decisions are more likely to be based on the business sector and preferences of individual employers and employees rather than following any market trends.
- 3.17 However, there are examples of clustering and agglomeration of activity within the wider 'knowledge economy' umbrella, with a number of well known examples from around the world, most notably Silicon Valley in North Carolina, and Cambridge in the UK.
- 3.18 The logic here suggests that knowledge driven business activities are attracted to locations where they can share practice and knowledge and/or benefit from research and development specialisms. Financial, Business and Professional Services have increasingly been linked to quality urban centre locations; essentially the new generation clustering raises the importance of amenity and environment property considerations.
- 3.19 Further to this, there is evidence to suggest the mutually beneficial co-locating of knowledge drivers and relevant 'growth assets' including key educational facilities, existing science and Research & Development locations (including major local employers), but also Ports. There is also evidence to suggest that there is a prevalence of high value businesses operating from home (indeed it is suggested that this trend is growing), therefore placing them outside of the direct remit of studies like this whilst still recognised as making a valuable contribution to productivity across the region.

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- 3.20 There is arguably more of a correlation between market towns and the rural areas of the sub-region and the knowledge economy (linked to SME and working from home). This raises the potential to consider move away from 'Strategic Sites' towards 'Strategic Locations' or 'Locally Significant Employment Sites' (as a concept, for example linked to key rural locations in proximity to growing market towns / locations to receive investment in the built environment).
- 3.21 It is important when considering sector specific growth potential that the application of the previously identified criteria does not constrain specific growth opportunity around existing clusters of activity. In many cases this links rather than contradicts previously identified criteria including specific 'growth assets'. However it is also recognised that, for example, the stringent application of sustainability considerations (specifically relating to the proximity of sites to sustainable modes of transport).
- 3.22 For example, it is specifically recognised that port-related employment activities often intrinsically demand proximity to road transport hubs (albeit they also benefit from rail freight connectivity), and that rural sites or sites outside of main urban areas often do not benefit from sustainable transport connectivity whilst they may have a significant contribution to make to the promotion of a higher value economy across the sub-region.
- 3.23 The criteria is developed in such a way to ensure that the complexity of the economy (current and future potential) is noted and facilitated / encouraged through appropriate and realistically developable land allocations. The recognition of the rural economy (including sites that provide a 'strategic' local employment function) represents a divergence from traditionally identified strategic sites.

AMENITY AND SKILLS ALIGNMENT

- 3.24 For the purposes of this criteria, 'amenity' is defined as including labour force (specifically proximity and accessibility to an appropriately skilled labour force), local retail and leisure provision, and a quality and diverse built environment. There is various literature to support the concept of the need to include high-quality architecture and accommodation to support both workers and businesses, alongside diverse cultural and leisure facilities to encourage people to invest, work, and live in a location, and the supply of a highly-skilled workforce to attract businesses relying on productivity.
- 3.25 This criteria tends to favour urban (town or city) centres as prime locations for strategic employment investment. This is especially evident in locations which provide quality public realm, a good mix of retail, food and drink provision alongside leisure and cultural amenities. It also however allows consideration of the potential to prioritise investment in the public

realm, and opportunities to promote suitable mix of uses on strategic sites to support employment development (and quality of employment by sector) in the future.

- 3.26 Amenity provision has been tested through both site visits, the consideration of workforce skills (including areas of high qualifications but also low as areas of regeneration priority) (illustrated on Plans 8 and 9 within Appendix 1), and employment by sector as indicator of vocational skills levels. Sites and their locations should be considered in this context to determine the character of their local workforce catchment.

SITE CONSTRAINTS AND DEVELOPMENT FEASIBILITY

- 3.27 Using the criteria as previously identified as a spatial-driven tool for testing existing and potentially identifying future strategic sites, it is important to also consider the deliverability of sites. This reflects current and emerging planning policy requirements to ensure that allocations are deliverable within the plan period timeframe. It is recognised that some of the existing strategic sites are long-standing allocations that have been carried over from previous plan periods – their appropriateness as strategic employment sites should be considered in this context.
- 3.28 Through this assessment it will also be possible the potential need for funding or enabling development to ensure employment opportunities are maximised in the most appropriate way on strategic sites.
- 3.29 Specific consideration should be given in this context to potential constraints that may affect the deliverability of the strategic sites over the plan period. These potential constraints could include the likely need for Compulsory Purchase Orders (in response, for example, to multiple or complicated patterns of ownership), any identified need for remediation or specific issues associated with contamination of land or remaining on-site structures, and the absence of or need for additional utilities and services provision (both of which are considered to be major unknown costs and therefore key deterrents for developers to invest speculatively).
- 3.30 The consideration of deliverability also includes the testing of strategic sites against the ‘standard’ criteria as identified within the (former) Office of the Deputy Prime Minister (ODPM) Employment Land Review Guidance Note (2004) including consideration of the following. It is however important to note that the purpose of this initial analysis is not to test whether the sites should be retained for employment use into the next plan period (as is the purpose of the ODPM Guidance Note criteria, to be picked up in the main component of the Suffolk Haven Gateway Employment Land Review) but rather the potential strategic contribution of the site.

Quality of Existing Portfolio and Internal Environment

- Age and quality of buildings;
- Noise and other obvious pollutants;
- State of the external areas and public realm; and
- Parking, internal circulation and servicing.

Quality of the Wider Environment

- Adjacent land uses constraining operations or quality of uses on site;
- Perception of the wider environmental quality; and
- Local facilities for workforce.

Strategic Access

- Ease of access to main road network; and
- Proximity to rail, sea and air freight.

Market Conditions / Perception and Demand

- Strength of local demand in segment;
- Recent market activity on site; and
- Likely market demand and viability of development without intervention.

Ownership and User Constraints on Development / Redevelopment

- Identify and number freehold owners;
- Identify leasehold or other occupiers, length of lease etc; and
- Ransom strips or other known ownership constraints on development.

Site Access

- Topography, size and shape;
- Utilities;
- On-site environmental (nature conservation, trees, cultural heritage, landscape);
- Contamination / land stability / on-site structures; and
- Amenity of adjacent occupiers.

Accessibility

- Workforce catchment; and
- Access by public transport.

Sequential Test and Brownfield / Greenfield

- Urban, urban edge or outside urban; and
- Previously developed in whole or in part.

Social and Regeneration Policy

- Availability of other jobs locally;
- Deprivation in local communities;
- Priority regeneration designation;
- Potential availability of 'gap' funding to develop; and
- Ability of site to support particular economic development priority.

Other Policy Considerations

- Alternative uses if no longer allocated for employment; and
- Other material policy considerations.

EEDA STRATEGIC EMPLOYMENT SITE CRITERIA

- 3.31 The ARUP Study (May 2009) defines a criteria for regional strategic employment sites based on: analysis of approaches taken elsewhere to define strategic employment sites; the policy framework; and comments provided by the steering group, strategic planning authorities and attendees at the market workshop held as part of the commission.
- 3.32 Five key themes, each with individual criteria frame the definition of strategic employment sites in this context:

Provision of future capacity

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

Meeting regional objectives

- Contribution to wider regional objectives of jobs growth, providing a choice of quality sites and supporting the growth of clusters.

Scope, scale and influence

- Sites should be of regional / inter-regional / or national significance;
- Sites should be capable of providing sufficient employment to support sub-regional scale labour catchments; and or
- Sites should accommodate uses that serve regional or national markets.

Vision and focus

- Sites should have a clear identity / brand and a clear vision of their future role;
- Sites should have a clear office, manufacturing, research or distribution / logistics employment focus; and or
- Sites should accommodate single large scale users or multiple users, which fit with the overall strategy.

Economic drivers

- Sites should accommodate leading edge sectors; and / or
- Sites should accommodate uses that add to the 'economic base' of the region and are clear economic drivers.

Transport and planning policy compliance

- Sites should offer high levels of accessibility by public and private transport and be consistent with transport policy; and / or
- A strategic employment site use should be consistent with current and emerging planning policy.

3.33 Regionally strategic employment sites have characteristics to include:

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- High quality sites, which are attractive to national and international investors;
 - Have a good road and public transport accessibility;
 - A clear identity / brand and future vision for the site;
 - Should accommodate development, which could not equally be accommodate elsewhere; and
 - Support specific sectoral needs, such as knowledge based services clustered close to universities, major hospitals or other research establishments.
- 3.34 Regional gateway and logistics employment sites are considered within the ARUP's report to include airports, ports and logistics sites. These sites must contain inter-modal freight facilities and terminals to encourage sustainable passenger and freight distribution; and serve more than a local market.
- 3.35 Key characteristics of regional gateway and logistics sites are:
- Served by rail and operate as an inter-modal terminals;
 - Have good road and rail access;
 - Meet a strategic demand for passenger travel or distribution; and
 - Provide an opportunity to accommodate uses associated with the terminal, which require physical proximity.
- 3.36 The identified key characteristics of sub-regional strategic sites are:
- Good quality sites, which are attractive to businesses with sub-regional focus;
 - More likely to offer general employment space rather than be sector specific;
 - Have good road and public transport accessibility; and
 - Supporting wider RSS / RES objectives, such as regeneration or creation of sustainable communities.

4. STRATEGIC SITE ASSESSMENT

- 4.1 This section is a summary of the alignment of the seven strategic sites with the identified strategic sites criteria. This assessment will be revisited in the final Employment Land Review (ELR) however it is recognised that the emerging conclusions relating to each site shapes the understanding of overall employment land requirements over the plan period in each of the relevant / respective authority areas.
- 4.2 The appropriate scale of employment development at the sites will be tested in more detail within the ELR, relating back to headline demand and economic aspirations where appropriate.

ADASTRAL PARK, MARTLESHAM

BROAD LOCATION

- Located adjacent to / within the strategic A14 / A12 corridor;
- Regular bus services observed along A14 and A12 linking to Felixstowe, Ipswich, and smaller settlements; and
- BT recognised to be key occupier.

SECTORAL CLUSTERING POTENTIAL

- Post and telecommunications cluster observed in local area;
- Observed Research & Development specialism clustering at employment site.

AMENITY AND SKILLS ALIGNMENT

- Local amenity provision observed within walking distance (reasonable quality pedestrian environment) including retail, crèche, bank, and other supporting services; and
- No specific alignment with skills within local area (relatively slow skills in area proximate to site).

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- No major development constraints identified, including environmental constraints on or adjacent to the site;

- Potential road capacity constraints along A12 in coming years, linked to capacity of Orwell Bridge;
- Site recognised by commercial agents to be quality Grade A office development opportunity as an alternative to Ipswich town centre; and
- Site is within single ownership (BT).

EMERGING RECOMMENDATIONS

- 4.3 Adastral Park is considered to have strong alignment with the strategic site criteria identified linked specifically with the sector potential of post and telecommunications including R&D functions.
- 4.4 There are no factors identified on the site that would constrain development within the short to medium term, although the current economic climate constrains immediate development on the site (in addition to the need for any proposals to go through the planning process which will constrain development in the immediate term).
- 4.5 Given the local amenity provision and lack of identified constraints there is no need identified for enabling or supporting development specific to the site. As a result B1 employment development (including Grade A office uses) should be sought to be maximised on the development land.
- 4.6 Adastral Park is identified to have regional strategic significance within the EEDA Regional Strategic Employment Sites study (May 2009), linked specifically to its alignment with the Computer Services and ICT sectors. The study concludes that it is likely that growth within these sectors will demand sites close to existing research institutions which are concentrated in and around: Ipswich, Cambridge, and Colchester.
- 4.7 The EEDA study recognises that the Adastral Park site has clear research function and the vision for the future development of the site focuses on consolidating this. The site is seen to contribute to the economic base of the wider sub-region. The site offers high levels of accessibility by public and private transport.
- 4.8 The text box overleaf summarises the key market considerations, recommendations / key actions, and risks associated with the site as stated within the EEDA study.

Adastral Park: Market Considerations

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

Adastral Park: Recommendations / Key Actions for Delivery

The key delivery issue for the future growth of the site relate to infrastructure, in particular power and transport. The planning application includes proposals to improve A12 junctions, as well as identifying a site for a renewable energy plant. Power is a critical issue for the site and capacity constraints have already previously nearly constrained development on site. The Haven Gateway Integrated Development Programme (IDP, December 2008) notes that the electricity supply to Martlesham, including Adastral Park, is 'simply insufficient in relation to the scale of planned growth. Discussions are ongoing with EDF but timing of major new investment has still to be resolved.'

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

Adastral Park: Risks

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

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

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

BRANTHAM INDUSTRIAL SITE, BRANTHAM

BROAD LOCATION

- Within 20 minute walking distance of Manningtree train station (London – Ipswich line) (albeit quality of pedestrian route is questionable);
- Low skills observed in local area so local regeneration need; and
- On the edge of small town settlement.

SECTORAL CLUSTERING POTENTIAL

- No clustering potential identified within Babergh District area (NB: analysis to be undertaken of Colchester and Tendring on the basis of cross-boundary considerations); and
- ICI noted to be key occupier on site but limited scope for clustering potential / spin-off / supply chain linkages; and
- Predominantly 'dirty' uses (heavy users) observed on the site.

AMENITY AND SKILLS ALIGNMENT

- No amenity provision of any scale or quality observed within proximity to the site, local retail provision to the north of Brantham, and within Manningtree centre but both considered insufficiently proximate to the site; and
- No strategic links with areas of high skills identified.

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- Poor quality of remaining structures on site including lack of attractiveness to market in current form / condition;
- High flood risk;
- Comprehensive development of site constrained by railway dissecting land, including poor quality (low height tunnel) linking two sides;
- Site understood to suffer from significant contamination (NB: it is understood that this is concentrated within the lower portion of the site, where development is constrained specifically by poor access under railway line);

- Significant environmental constraints including proximity to SSSI / SPA / RAMSAR designations;
- Site is within multiple ownership; and
- Limited commercial market appetite for employment development within area (low rental opportunity perceived for any development for this use in the foreseeable future).

EMERGING RECOMMENDATIONS

- 4.9 It is recognised on the basis of the site assessment that the Brantham Industrial site has limited alignment with the strategic criteria. However it is seen to have a potentially significant role in delivering employment opportunities for the local area, on an appropriate scale.
- 4.10 Given the lack of strategic drivers, and as a result of the understood constraints on the site (including a specific focus of contamination and access issues) development for employment use is not considered to be appropriate on the southern portion of the site.
- 4.11 It is unlikely given the constraints on the northern portion of the site, and current commercial market appetite for employment development within the area, that this land would be brought forwards comprehensively for B1, B2 or B8 employment use in the short to medium term. The ELR will test the extent to which the whole site is required to meet employment growth aspirations in this context.
- 4.12 The Brantham Industrial Site is identified to be a local employment site within the EEDA Regional Strategic Employment Sites study (May 2009). The study concludes that the site is substantially developed for general employment use, providing important local employment opportunities.
- 4.13 The study recognises that there is scope for redevelopment of vacant units but concludes that there is no clear economic vision in place. As a result it is stated that the site does not meet the strategic criteria.

FORMER BRITISH SUGAR SITE, SPROUGHTON

BROAD LOCATION

- Site located adjacent to A14 corridor;
- Site has adjacency to railway line linking to Felixstowe, although it is understood that enabling a rail freight link between the two is not feasible;

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- Site lies nearby Ipswich town centre, which has observed above average proportions of working age people without qualifications; and
 - Site lies just beyond 20 minutes walking distance to Ipswich train station, with questionable pedestrian environment.

SECTORAL CLUSTERING POTENTIAL

- Site located adjacent to existing cluster of employment within transport related activities; and
- Site also proximate to clustering of business and financial activity within Ipswich centre, however, any future development would be considered in commercial market terms to be an out-of-centre offer rather than continuation of this cluster.

AMENITY AND SKILLS ALIGNMENT

- Site within walking distance of a supermarket, albeit this is observed to be the only real amenity provision (offering limited choice to any future workforce), and the pedestrian environment is of a poor quality (through an existing industrial area); and
- Relatively high proportion of working age residents within Ipswich town centre have high (Levels 4 or 5 or above) qualifications.

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- Significant contamination remaining on the site (partial remediation has been undertaken) associated with the former uses, contamination understood to include arsenic and ammonia;
- Historic landfill activities on the site have resulted in potential subsidence issues;
- Site located within proximity to recognised employment location (general business and light industrial activities); and
- Scale of site recognised to offer significant commercial potential.

EMERGING RECOMMENDATIONS

- 4.14 Given its strategic location on a junction of the A14 the site is seen to have strategic alignment with the criteria, specifically related to the opportunity to promote port-related employment activity in the future.

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- 4.15 The site also has alignment with employment opportunity and need within the Ipswich Fringe policy area, and is viewed by commercial market agents as a viable and strong employment development location in the short to medium term.
- 4.16 The Former British Sugar Site is identified to have sub-regional strategic significance within the EEDA Regional Strategic Employment Sites study (May 2009), without any clear sector focus identified.

WHERSTEAD (FORMER E-ON HQ)

BROAD LOCATION

- Site located proximate to the A14 corridor;
- Site not within 20 minute walking distance of train station; and
- No specific public transport links noted (including connectivity to Ipswich centre and smaller residential settlements).

SECTORAL CLUSTERING POTENTIAL

- No clustering potential identified, including no key occupiers;

AMENITY AND SKILLS ALIGNMENT

- No amenity provision supporting the site;
- No noted alignment with above average skills levels.

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- Whilst site is located in proximity to the A14 corridor, it has poor access from this strategic route including a single lane road, indeed it is noted that new access to the site will be required across the allocated land reducing development potential;
- Limited area considered suitable for development (due to landscaping around existing employment function);
- Listed boundary wall (Grade II) potentially restricting / constraining development on 'available' land at the site;
- Site is located within Suffolk Coast and Heaths Area of Outstanding Natural Beauty;

- Commercial market appetite identified for future development at the site however in its current form it is only considered suitable for office uses; and
- Site is considered by agents to be an out-of-centre B1 office location alternative to Ipswich.

EMERGING RECOMMENDATIONS

- 4.17 Whilst commercial market agents suggest this site is a good employment development opportunity the actual availability of land is questioned in terms of its scale when the need for a new access route and retention of listed wall are taken into account against the 'available' land.
- 4.18 No specific sector clustering potential has been identified. However, the development brought forwards at the site to date is noted to be of a high quality, and well occupied including some alignment with growth at Felixstowe including office functions associated with port businesses (P&O Ferries, and McNamara Shipping both observed to be occupiers at the site at the current time).
- 4.19 The strategic development potential at this site is questioned on the basis of scale and the constraints to land available limiting floorspace opportunity, compared to the availability at other strategic sites considered. It is however noted that the existing activity at the site is of strategic importance to the economy (currently occupied by Co-Op HQ).
- 4.20 Wherstead is not identified within the EEDA Regional Strategic Employment Sites study (May 2009).

RANSOMES EUROPARK

BROAD LOCATION

- Located adjacent to A14 corridor;
- Site has adjacency to railway line linking to Felixstowe, although it is understood that enabling a rail freight link between the two is not feasible;
- Site is not within walking distance (20 minutes) of Ipswich town centre;
- Regular bus services observed along A14 and Nacton Road linking to Felixstowe, Ipswich, and smaller settlements; and
- Site is located within area of regeneration need (as identified by the Index of Multiple Deprivation).

SECTORAL CLUSTERING POTENTIAL

- Clear clustering opportunity associated with transport (distribution and logistics) in the area; and
- Potential to cluster activity around MSC Shipping, an observed key occupier within the existing Ransomes Europark development.

AMENITY AND SKILLS ALIGNMENT

- Amenity provision observed to be good, with retail and leisure, and general amenity, noted within walking distance of site; and
- Site in proximity to above average skills levels, and is proximate to new housing development including luxury family housing.

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- No apparent constraints restricting development on remaining land at Ransomes Europark;
- No environmental designations impacting development potential at the site;
- Anecdotal evidence to suggest access to the eastern portion of the site is a development constraint, however, this was not identified by market consultations undertaken;
- There are capacity issues on Nacton Road which may act as a constraint to future development in the area; and

- There is considered to be sufficient market appetite for future employment development including predominantly B1 and B2 uses at Ransomes.

EMERGING RECOMMENDATIONS

- 4.21 Ransomes Europark is considered to be a high quality and market desirable employment location. Limited future capacity for development (on available land rather than through infill opportunity) is considered to be relatively low, excluding the eastern portion of the site.
- 4.22 In undertaking consultation with agents regarding the site it is apparent that the market would support (and therefore bring forwards) employment development on the eastern portion of the site as the next phase of Ransomes. However, it is imperative that the consideration of phasing of future employment development in this location also includes the potential impact of the Cranes site to the north.
- 4.23 This point is revisited in the emerging recommendations following analysis of the Cranes site in the following sub-section.
- 4.24 The Ransomes Europark site is identified within the EEDA Regional Strategic Employment Sites study (May 2009) as potentially having an important local employment role but is noted to not have a clear future economic vision, therefore failing the ARUP identified strategic site criteria.

CRANES SITE, IPSWICH

BROAD LOCATION

- Located adjacent to A14 corridor;
- Site has adjacency to railway line linking to Felixstowe, although it is understood that enabling a rail freight link between the two is not feasible;
- Site buffered on both sides by employment activity (including Ransomes to the south);
- Site is on the border of being within walking distance (20 minutes) of Ipswich town centre;
- Regular bus services observed along A14 and Nacton Road linking to Felixstowe, Ipswich, and smaller settlements; and
- Site is located within area of regeneration need (as identified by the Index of Multiple Deprivation).

SECTORAL CLUSTERING POTENTIAL

- Clear clustering opportunity associated with transport (distribution and logistics) in the area; and
- Potential to cluster activity building on activity within Ransomes Europark.

AMENITY AND SKILLS ALIGNMENT

- Amenity provision observed to be good, with retail and leisure, and general amenity, noted within walking distance of site; and
- Site in proximity to above average skills levels, and is proximate to new housing development including luxury family housing.

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- There are significant on-site structures acting as constraints to development in the future, including potential (perceived) contamination issues;
- There are no environmental constraints identified restricting development at the Cranes site;
- It is understood that the landowners (single ownership) bought the site for a value above that that could be realistically achieved for employment development within the current market climate; and
- Market perceptions of the employment potential at Cranes are linked to that at Ransomes, where demand has been identified for future phases, albeit Cranes is perceived to be a more difficult site to develop.

EMERGING RECOMMENDATIONS

- 4.25 There are significant constraints affecting the employment development potential of the Cranes site. However, with market appetite for future development at Ransomes Europark it is possible to view this site as a continuation of this strategic employment location. In this context, Cranes is seen to benefit from the same strategic opportunity, both sectorally and locationally, as Ransomes.
- 4.26 The market perceives this area of Nacton Road to be an employment corridor, and indeed if Cranes is lost in its entirety to other non-employment uses (including Non-B employment) it may jeopardise the future function of employment allocations to the north of Cranes.

- 4.27 A further indirect constraint to development at Cranes is the availability of more readily developable land to the east of Ransomes. In order to promote development of the PDL at Cranes in advance of the eastern Greenfield land it is suggested that Cranes be considered as Phase 2 of Ransomes, with the eastern portion phased later in the plan period, or beyond. By restricting land supply to the east in this way Cranes the opportunity for employment development is more feasible at the site therefore maximising market potential associated with Ransomes.
- 4.28 The Cranes site is identified within the EEDA Regional Strategic Employment Sites study (May 2009) as a local employment site, without clear future economic vision, failing to meet the strategic criteria.

RENDHAM ROAD, SAXMUNDHAM

BROAD LOCATION

- Site located directly on the A12 with junction access;
- Site located on western periphery of medium sized rural settlement;
- Site located within 20 minutes of railway station; and
- Site located within area of regeneration need (high proportion of residents with no qualifications)

SECTORAL CLUSTERING POTENTIAL

- Business Services clustering potential within the immediate area; and
- No major occupiers within observed within Saxmundham.

AMENITY AND SKILLS ALIGNMENT

- Amenity provision within the main town of Saxmundham but relatively long distance from the identified site; and
- Relatively high concentration of working age residents within the catchment area with qualifications above Level 4.

SITE CONSTRAINTS / DEVELOPMENT FEASIBILITY

- No environmental designations known to restrict development on the site;

-
- Potential surface water issues (it is understood that if the site is developed it will require a lagoon);
 - Observed capacity issues on the A12 with single carriage on the approach to the site; and
 - Site is noted to be longstanding employment designation with limited market interest to date

EMERGING RECOMMENDATIONS

- 4.29 While there are no specific development constraints affecting the Saxmundham site there has been little market interest for high value employment uses on it to date..
- 4.30 However, its strategic access and proximity to high skilled population and clusters of financial and business services employees indicate its potential as a sustainable employment location in the future. In this context it is viewed as a locally significant employment location with the likelihood that a major occupier would be required to act as a catalyst to develop a site of a strategic nature.
- 4.31 Rendham Road is not identified within the EEDA Regional Strategic Employment Sites study (May 2009).