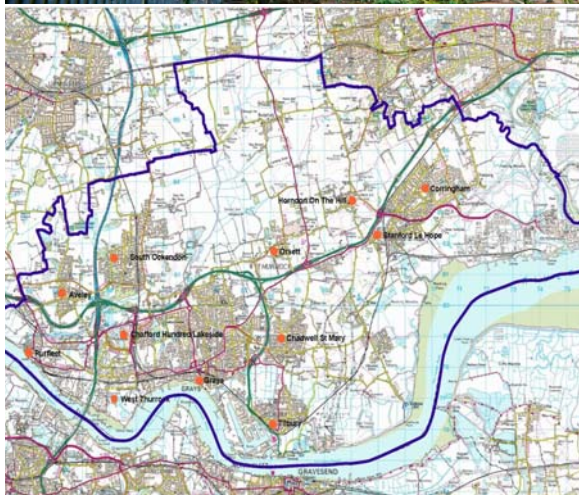


Thurrock Employment Land Review

Final Report



Prepared for:
Thurrock Borough
Council




Prepared by:
URS Corporation
Limited
In Association with:
Knight Frank

Thurrock Employment Land Review

January 2007
Final Report
Issue No 1
44406827

Project Title: Thurrock Employment Land Review
Report Title: Final Draft Report
Project No: 44406827
Report Ref: -
Status: Draft
Client Contact Name: Richard Hatter
Client Company Name: Thurrock Council
Issued By: St. George's House, 2nd Floor
 St. George's Road
 Wimbledon
 London
 SW19 4DR

Document Production / Approval Record

Issue No: 1	Name	Signature	Date	Position
Prepared by	Anthony Batten		08/01/07	Senior Regeneration Consultant
Checked by	Rory Brooke		08/01/07	Principal
Approved by	Rory Brooke		08/01/07	Principal

Document Revision Record

Issue No	Date	Details of Revisions
1	09/11/2005	Clarifications and amendments to the market assessment, the overall recommendations and the forecasting chapters.
2	29/02/2006	Review of some data, re-ordering of text and clarifications
3	26/07/06	Minor updates
4	30/08/06	Minor updates
5	13/12/06	Minor updates
6	08/01/07	

LIMITATION

URS Corporation Limited (URS) has prepared this Report for the sole use of Thurrock Borough Council in accordance with the Agreement under which our services were performed. No other warranty, expressed or implied, is made as to the professional advice included in this Report or any other services provided by us. This Report may not be relied upon by any other party without the prior and express written agreement of URS. Unless otherwise stated in this Report, the assessments made assume that the sites and facilities will continue to be used for their current purpose without significant change. The conclusions and recommendations contained in this Report are based upon information provided by others and upon the assumption that all relevant information has been provided by those parties from whom it has been requested. Information obtained from third parties has not been independently verified by URS, unless otherwise stated in the Report.

Where field investigations have been carried out, these have been restricted to a level of detail required to achieve the stated objectives of the services. The results of any measurements taken may vary spatially or with time and further confirmatory measurements should be made after any significant delay in using this Report.

COPYRIGHT [CHECK WHO HAS COPYRIGHT]

© This Report is the copyright of URS Corporation Limited. Any unauthorised reproduction or usage by any person other than the addressee is strictly prohibited.

CONTENTS

Section	Page No
ABBREVIATIONS	VIII
EXECUTIVE SUMMARY	1
1 INTRODUCTION	6
1.1 Context and Purpose	6
1.2 Study Area.....	6
1.3 Report Structure	7
2 APPROACH	8
2.1 Introduction.....	8
2.2 Employment and Business Profiling.....	8
2.3 Employment Land Survey	8
2.4 Market and Demand Assessment.....	10
2.5 Business Consultation.....	11
3 POLICIES AND PROGRAMMES	12
3.1 Introduction.....	12
3.2 National Policy.....	12
3.3 Regional Policy.....	14
3.4 Local Policy	16
3.5 Thurrock Thames Gateway Development Corporation (2003)	24
4 LITERATURE REVIEW	26
4.1 Introduction.....	26
4.2 ODPM Sustainable Communities Plan (2003)	26
4.3 Thames Gateway South Essex sub-Regional Strategy (2005)	26
4.4 Thames Gateway South Essex “A Vision for the Future”	26
4.5 Thames Gateway and Essex Report 2005-2006	27
4.6 The Transport and Logistics Sector of Thurrock and South Essex	27
4.7 Bone Wells Employment Study (2004)	27
4.8 Transforming and Revitalising Thurrock: A framework for regeneration and sustainable growth (2005)	28
4.9 RSS14 Housing and Employment Alignment Study (2004 and 2005 update)	29
4.10 Thurrock UDC Baseline Study (2004).....	30
4.11 ASPIRE Community Strategy for Thurrock (2003)	31
5 SOCIO-ECONOMIC STRUCTURE	32
5.1 Introduction.....	32
5.2 Population	32
5.3 Workforce	33
5.4 Local Economy and Businesses	35

CONTENTS

Section	Page No
6 CONSULTATION ON BUSINESS NEEDS	38
6.1 Introduction.....	38
6.2 Profile of Business Respondents	38
6.3 Key Consultation Findings	39
7 THE EMPLOYMENT LAND MARKET	40
7.1 Introduction.....	40
7.2 Market Analysis Thurrock Borough.....	41
7.3 Office Availability in Thurrock Borough	42
7.4 Office Take-up in Thurrock Borough.....	45
7.5 Industrial Land Availability in Thurrock by Sub-market.....	50
7.6 Industrial Take-up in Thurrock Borough.....	60
7.7 Implications of the Shell Haven Scheme on Future Demand	66
7.8 Conclusion.....	71
8 QUALITY AND CHARACTERISTICS OF EMPLOYMENT LAND	73
8.1 Introduction.....	73
8.2 Employment Land	73
8.3 Employment Clusters and Condition.....	76
8.4 Vacant and Developable Land	82
8.5 Vacant and Derelict Sites: Local Accessibility	84
9 EMPLOYMENT LAND DEMAND FORECAST	87
9.1 Introduction.....	87
9.2 Land Developed	87
9.3 Employment	90
9.4 Synthesis Forecast.....	96
9.5 Conclusion.....	102
10 CONCLUSION AND RECOMMENDATIONS	104
10.1 Introduction.....	104
10.2 Conclusions.....	105
10.3 Recommendations	106
APPENDICES 1 & 2: SITE SURVEY QUESTIONNAIRES	113
APPENDIX 3: URS CONSULTATION ON BUSINESS NEEDS QUESTIONNAIRE	120
APPENDIX 4: BONE WELLS ASSOCIATES THURROCK BUSINESS SURVEY	122
APPENDIX 5: FULL SURVEY RESULTS	127
APPENDIX 6: EMPLOYMENT CLUSTER PLANNING PERMISSION DATA.....	179

CONTENTS

Section	Page No
APPENDIX 7: THURROCK EMPLOYMENT AREA MAPS	186
APPENDIX 8: INDUSTRIAL AND COMMERCIAL AREAS IN THURROCK	223

ABBREVIATIONS

LDF	Local Development Framework
NDCs	National Distribution Centres
ODPM	Office of the Deputy Prime Minister
DCLG	Department for Communities and Local Government
ONS	Office of National Statistics
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
RDCs	Regional Distribution Centres
RPG	Regional Planning Guidance
RSS	Regional Spatial Strategy
TTGDC	Thurrock Thames Gateway Development Corporation
UDP	Unitary Development Plan
VOA	Valuation Office Agency

EXECUTIVE SUMMARY

Purpose

URS together with Knight Frank were commissioned by Thurrock Borough Council to undertake an employment land study to assess the quantity, quality and viability of employment land throughout the Borough. The need for such studies has been emphasised in the latest revisions to the DCLG's Planning Policy Statement (PPS) 3 Housing made in November 2006. PPS3 suggests that local planning authorities should review all their non-housing allocations when reviewing their development plans and consider whether some of this land might be better used for housing or mixed-use

Approach

The study area included the whole of the Borough of Thurrock. The main employment areas are located on the River Thames at Pufleet, West Thurrock, Tilbury, Grays (offices) and at Coryton. In addition there are small pockets of employment land in other parts of the Borough including South Ockendon. Existing employment areas studies included mostly large industrial areas, a minority of business parks/storage and distribution centres and a number of small town centre sites as identified in existing development plans.

Thurrock is a Borough in the Thames Gateway of strategic importance, which may be set for significant change in the next fifteen years as there are proposals for a new London Gateway container port and a logistics and business park at Shellhaven. The facility was master planned to accommodate 947,100 m sq of low density B1 (b), B1 (c), B2 and B8 development. However, the Secretary of State in August 2006 indicated the intention to exclude the "Refinery Expansion Land" and "Tongue Land" from the sites area, which would result in a reduction of 20% of the total developable area (from approximately 312 to 245 hectares of land). However at the density proposed this would only result in an estimated decrease of actual commercial floorspace of 10%.

The following elements of work informed this study and our recommendations:

- Employment profiling
- Employment land surveying
- Market and demand assessment
- Employment Land Demand Forecasting
- Business consultation

Employment and Business Profiles

A broader socio-economic analysis was undertaken of Thurrock Borough within the context of the East of England and Great Britain as a whole in order to provide an in depth understanding of the current population and socio-economic make-up of the Borough.

In 2003, 63.2% (91,800) of the population were of working age in Thurrock and 81.1% of those people were economically active. This is in-line with economic activity rate for the Eastern region (81.7%)

and slightly above the rate for Great Britain (78.2%). The unemployment rate in Thurrock is 3.2%, which is less than that of the East of England and Great Britain. Since 1993, Thurrock has experienced a gradual growth in jobs in the Borough. The number of people employed in Thurrock has increased by 23% to the 2003 level of 56,681 people working in the Borough.

In terms of businesses and sectors, between 1993 and 2003 the number of workplaces in Thurrock has almost doubled from 2,410 to 4,330. The largest percentage increase was seen in the construction sector, corresponding with the increase in jobs, the number of construction industry workplaces increased from 141 units to 595 units (422%). The wholesale and retail trade sector also saw an increase in the number of workplaces from 733 to 1,136 units.

Employment Land Survey

Surveyed employment areas included both primary and secondary industrial and commercial areas and land within them that was earmarked for new industrial and commercial development. Other surveyed areas included oil refineries and oil & chemical storage areas

Identified employment areas were grouped into 36 clearly defined clusters, within which approximately 250 individual sites were identified - 32 sites were identified as vacant or derelict. The Thurrock Employment Areas inset map at the rear shows the location of employment clusters and vacant or derelict development sites.

Each employment cluster was visited and appraised against an agreed set of economic, planning and property market criteria to assess fitness for purpose. This criteria was based on ODPM guidance notes (Annex E of the 2004 Employment Land Reviews), the consultants' experience and the Council's requirements. Identified vacant and derelict development sites were also appraised against an additional set of criteria to measure their sustainability, marketability and potential for being brought forward for employment use.

We generally found that employment areas were in good condition in terms of quality of environment and building quality. A majority of sites had good or very good access to the trunk road network, including the A13, A1306, A1090 and A126. In terms of vacant and derelict sites, a majority had good local accessibility in that they had could be accessed easily from the local and trunk road network, with reasonable public transport access.

Market Review

Knight Frank undertook a market review by looking at trends in employment related development and occupancy rates by sector and location.

Traditionally, Thurrock has seen a low demand for offices and a high demand for industry – particularly warehousing, distribution and other B8 uses. The majority of developed employment land since 1995 has been in the sub-markets of Grays and West Thurrock and has been for B8 related uses. Although the market has demonstrated a capacity to attract larger occupiers seeking Regional and National Distribution Centres accommodation in recent years, the number of larger premises, currently available in the market is limited. Should the proposed Shellhaven scheme not be approved this situation will continue and the industrial market within Thurrock may be increasingly focused on smaller industrial units leading to a decline in the average annual take-up levels.

Although the impact of the Shellhaven scheme potentially gaining approval will have a significant bearing on Thurrock, it is also important to note the role that the Thurrock Thames Gateway Development Corporation (TTGDC) will play in affecting development in the Borough with its powers to acquire, hold, manage, reclaim and dispose of land and property. The aspiration is that the TTGDC will act as a catalyst for considerable regeneration within the Borough regardless of whether Shellhaven is approved.

Demand Forecast

Our synthesis approach to employment land demand forecasting takes account of the following factors:

- Land developed and historical data relating to growth in floor space; and
- Employment forecasts based on historical data

Table 1 below provides the estimated total additional employment land demanded by 2021 using a low, best and high estimate. Our forecast has also considered the impact of the proposed Shellhaven development, using data provided by King Sturge.

Table 1: Net Employment Land Demand in Thurrock 2005 – 2021

Type of Property	Low Estimate (ha)	Best Estimate	High Estimate (ha)	Shellhaven Estimate
Office	7.0	8.3	9.5	12.5
Factories	0.9	9.0	16.6	61.1
Warehouses	37.3	47.8	57.8	169.4
Total	45.2	65.0	83.8	242.9

Source: URS Analysis

By 2021 additional forecasted demand of employment land is expected to range from 45.2 ha to 83.8 ha with a best estimate 65 ha (excluding the impact of Shellhaven).

In the event the Shellhaven development goes ahead, it is expected that impact will be significant. The annual forecasted change in employment land is expected to be 15.18 ha per annum with warehouse again being the key driver of demand. In regard to the total demand up to 2021, 243 hectares is expected. Shellhaven will largely create its own demand although we consider that their will be a displacement of approximately 10-15 hectares of industry from other parts of the Borough if or when the scheme does get underway – this is line with figures proposed by Bone Wells in their 2004 Employment Study.

Business Consultation

We were asked to summarise the key findings from Bone Wells Associates 2004 Thurrock business survey. The results have shown that a majority of business respondents identified their current premises as good or very good. In addition, most surveyed business did not foresee that they would need to expend their current floor space over the next few years.

Meanwhile, a relatively small proportion of business planned to move location in the next few years - of those who identified that they would move; a vast majority said that they would remain in Thurrock. Particular obstacles to employment expansion included specific skills availability as well as general labour availability. This is part of a wider regional and national trend of skills shortages however, and not specific to Thurrock. Overall Thurrock based business respondents were mostly happy with their existing premises, sites and location.

Conclusions and Recommendations

Table 2 below summarises the key findings of the Employment Land Review by setting out the overall Demand and Supply up to 2021:

Demand 2005-2021			Supply ¹	Target Re-designation (ha)	Shell Haven Estimate	
High	Best	Low			Supply	Demand
83.8	65	45.2	160	69.8 to 88.6 ²	200 - 312 ³	243

Source: URS

We have recommended that all of Thurrock’s designated employment land remains protected for employment use other than the sites listed below. In our conclusions the suggested area for de-designation from employment actually covers 95.2 hectares which is actually slightly higher than the target designation of employment land of 69.8 to 88.6 hectares as noted above. As explained in our conclusions however, it is not always possible to find an “exact fit” and the sites suggested for release include those that are largely unsuitable for continued employment purposes. The following sites are proposed for de-designation from employment and possible re-designation for other uses for the LDF plan period:

- Bluelands Quarry, West Thurrock
- Former Coal yard site, Purfleet
- Former Thames Board Mill site, Purfleet
- Globe Works, Little Thurrock
- Averley Industrial Estate, South Ockendon
- Bata / Thames Industrial Park
- Sandy Lane Pitt & Linford Road site, East Tilbury

¹ Supply identifies current vacant and developable land

² Allows for a buffer of employment land of approximately 6.4 hectares and includes a level of land release that is compliant with our best estimate and high employment floor space demand scenarios.

³ See Section 7.5 for explanation of the supply of vacant land at Shell Haven.

- Land South of London Road, West Thurrock
- Askew Farm/ Murco Oil Depot
- Titan Pit

Full justifications for release of individual site can be viewed in Chapter 10 of the report.

1 INTRODUCTION

1.1 Context and Purpose

URS together with Knight Frank were commissioned by Thurrock Borough Council to undertake an employment land study to assess the quantity, quality and viability of employment land throughout the Borough.

The need for such studies has been emphasised in the DCLG's Planning Policy Statement (PPS) 3 Housing made in November 2005 - PPS3 replaced Planning Policy Guidance (PPG) 3. PPS3 suggests that local planning authorities should review all their non-housing allocations when reviewing their development plans and consider whether some of this land might be better used for housing or mixed-use development.

Paragraph 41 of Planning Policy Statement 3 (PPS3), with regard to employment land and employment land review, states that:

'When considering planning applications for housing which are received in advance of the relevant development plan document being reviewed (particularly first development plan document), local planning authorities should take into account the policies in this statement as material considerations, as they may carry greater weight than the relevant policies in the development plan. In these circumstances or for sites not allocated in the development plan, local planning authorities should consider favourably planning applications for housing development:

- *where there is evidence of an imbalance between housing demand and supply, having regard to affordability issues and housing market conditions;*
- *if the site is suitable for housing development (including land allocated or previously used for industrial or commercial use, which is no longer needed for that use – as demonstrated by an up-to-date review of employment land); and*
- *the planning proposal makes efficient use of land, offers a good housing mix, is of high quality design and does not have an unacceptable impact on the environment.'*

Thurrock Council is in the early phases of researching and preparing their Local Development Framework (LDF) and this study forms an element of this work.

The study brief states that *'the Council requires a robust and defensible portfolio of both strategic and locally important employment sites and plan allocations in its Local Development Documents'* and that *'the initial study will assist in Development Control Decisions in defending the loss of sites regarded as key employment land'*.

1.2 Study Area

The study area included the whole of the Borough of Thurrock. The main employment areas are located on the River Thames at Pufleet, West Thurrock, Tilbury, Grays (offices) and at Coryton. In addition there are small pockets of employment land in other parts of the Borough including South Ockendon. Employment areas studies included mostly large industrial areas,

a minority of business parks/storage and distribution centres and a number of small town centre sites as identified in existing development plans.

1.3 Report Structure

This report sets out our draft final findings and policy recommendations for employment land in Thurrock Borough based on a comprehensive desk review and socio-economic analysis; individual employment area/cluster and site appraisals; review of historical trends in the commercial and industrial property sectors; and a forecasting exercise.

The remainder of this report is structured as follows:

- Section 2 gives details of our approach to the various research elements of the assignment;
- Section 3 describes the national, regional and local policy context of particular relevance to employment land and related issues in Thurrock Borough;
- Section 4 gives a brief review of key research reports including those supporting national and regional policy development;
- Section 5 provides a comprehensive analysis of socio-economic baseline conditions in Thurrock Borough relative to the East of England and Great Britain;
- Section 6 summarises the consultation responses from Bone Wells' 2004 business survey;
- Section 7 describes the employment land market in Thurrock Borough outlining the historical trends in the commercial and industrial property sectors;
- Section 8 sets out the key findings of our employment area appraisals and summarises the key qualitative and quantitative results;
- Section 9 sets out our employment land demand forecasts. Our synthesis forecast approach takes historic completion rates as a base for forecasting future employment floorspace demand; and
- Section 10 presents conclusions and recommendations on retention and release of employment land sites.

2 APPROACH

2.1 Introduction

There are a number of research elements informing this study, which are outlined in more detail below. These included:

- Employment profiling
- Employment land surveying
- Market and demand assessment
- Business consultation

2.2 Employment and Business Profiling

A broader socio-economic analysis was undertaken of Thurrock Borough within the context of the East Of England and the country as a whole in order to provide an in depth understanding of the current population and socio-economic make-up of the Borough. A number of information sources were reviewed including:

- Annual Business Inquiry
- Census Data
- Local Labour Force Survey
- New Earnings Survey
- VAT Registrations

An employment profile of the Borough was developed. This profile included:

- An overall socio-economic profile of the Borough
- Review of historical employment information for the Borough, compared with the region
- Review of unemployment and workforce information
- Review of local economy and business trends within the Borough

2.3 Employment Land Survey

This work began with a desk-based review of all the existing employment land within the Borough of Thurrock in order to identify the areas to be targeted for survey along with the broad employment area opportunities and constraints. Identified employment areas included both primary⁴ and secondary⁵ industrial and commercial areas and land within them that was earmarked for new industrial and commercial development. The latter comprised vacant and derelict sites, the majority of which had already been identified by the Council in their annual

⁴ Sites listed under Policy E1 in the Local Plan and under EMP1 in the UDP.

⁵ Sites listed under Policy E2 in the Local Plan and under EMP2 in the UDP.

monitoring reports of employment land⁶. Other employment areas that were surveyed included oil refineries, oil & chemical storage areas⁷ - including existing sites and their expansion areas. Identified employment areas were grouped into 33 clearly defined employment clusters. Within these 33 clusters we identified approximately 250 individual sites of which 32 sites were identified as vacant / derelict. An additional three employment clusters were subsequently identified by the Council from the Thurrock Borough Local Plan, which had either been redesignated from employment uses within the Thurrock Borough UDP or were “Major Developed Sites in the Green Belt” but identified as Employment land in the Plan. These three sites were not surveyed. The Thurrock Employment Areas inset map attached at the rear of this document shows the location of employment clusters and vacant / derelict development sites.

Each employment cluster was then visited and appraised against an agreed set of economic, planning and property market criteria to assess fitness for purpose. The criteria recorded at the employment cluster level were generally common to all individual sites within them. The main attributes reviewed and recorded were:

- Size of employment cluster
- Number of jobs in cluster (using commercially purchased business data)
- Existing use/s
- Existing local plan and UDP policies
- Developable area / vacant land
- Linkage to trunk road network
- Linkage of sites to wharves
- Quality of environment
- Topography issues
- Bad neighbourhood uses
- Proximity to other uses
- Servicing of businesses in the cluster
- Parking facilities
- Condition of buildings

Furthermore, the identified vacant / derelict development sites were appraised against the following additional criteria, to measure their sustainability, marketability and potential for being brought forward for employment use before the end of the LDF period or re-designation for a different use:

- Site area
- Existing local plan and UDP policies
- Developable area
- Access to public transport

⁶ In addition, policies E3 and E4 in the Local Plan; and EMP3 and EMP4 in the UDP were used to identify land for industrial and commercial development in primary and secondary areas.

⁷ Identified as policies E8 and E9 in the Local Plan; and as policies EMP8 and EMP9 in the UDP.

- Access to facilities and amenities
- Local road access
- Contamination
- Potential ecological value
- Any signs of development in the last five years
- Any visible signs of marketing of the site
- Issues / description

The surveyors used a pro-forma questionnaire along with a map of each employment cluster to undertake the survey. The questionnaire included a series of tick-box style and open-ended questions. This approach allowed for a qualitative and quantitative analysis to be undertaken.

Prior to going on site surveyors attended a briefing and were given a survey pack which included guidance on how each of the different questions should be completed to ensure that they answered consistently throughout the survey. Copies of the site survey questionnaire are included as Appendices 1 and 2.

Once the visual inspections were complete and the collected data entered into the database the survey sites were digitally mapped using GIS to provide a geographical picture of employment land distribution throughout the Borough. The site surveys were completed in August and September 2005.

URS also held a one-day discussion workshop with members of Thurrock Council's Sustainable Communities Directorate. The purpose of this was to discuss the main findings of the survey work and the consultants' initial impressions on the sustainability of sites for continued employment use. In addition, officers at the Council were able to clarify strategic factors affecting particular employment sites and notify us of any current planning applications and development proposals for employment sites.

2.4 Market and Demand Assessment

URS together with Knight Frank undertook a review of trends in employment related development and occupancy rates by sector and location. Historic data was gathered from Thurrock Council's annual monitoring information, plotting sheets, planning files and market information. Data was gathered, where possible, over a full business cycle in order to inform development of a fuller picture of potential demand over the next plan period.

The analysis was structured around a three stage approach focusing on:

- Present market conditions
- Linear forecast change in demand
- New factors affecting future demand (for example the proposed development at Shell Haven)

An assessment of net gains and losses was undertaken to identify the proportion of development taking place on currently vacant and unoccupied land, plus development taking place on land or in premises previously in other uses.

Based on the information collected an assessment was undertaken of the current and future allocation of employment land within Thurrock, which included:

- An assessment of the ability of the current employment areas and sites to meet demand
- Review of the current employment allocations in light of PPS3
- Assess the impact that loss of major employment sites could have on the local economy.

2.5 Business Consultation

URS attempted to consult with Thurrock based businesses through circulation of a tailored questionnaire requesting qualitative feedback, to business forums and groups in the Borough. The Council's Economic Development department sent the questionnaires to business forums/groups and requested responses over a three-week period in November and early December 2005. This consultation sought feedback from businesses on:

- Perceptions of economy and businesses in the Borough;
- The existing property market situation;
- Their current and future needs;
- Possible expansion plans; and
- Location and workforce issues

Unfortunately no businesses or business forum representatives responded to this questionnaire so there was a nil response rate. The questionnaire is included as Appendix 3. Instead, the consultants were asked by the Council to analyse and summarise the results of Bone Wells' 2004 Thurrock Business Survey. The outcome of this analysis has helped inform future forecast demand of employment land and premises.

3 POLICIES AND PROGRAMMES

3.1 Introduction

This section gives a brief overview of the strategy and policy context relevant to employment and employment land in the Borough of Thurrock.

In terms of statutory development plans, the Planning and Compulsory Purchase Act 2004 sets out a series of changes to the planning system. The current system of unitary, local and structure plans is to be repealed and replaced by a new system of regional spatial strategies and local development documents prepared by Local Planning Authorities (LPAs).

The regional spatial strategy will set out policies for the development and use of land in the region, which in the case of Thurrock relates to the East of England region. For the time being, existing regional planning policy guidance is the strategy for the Thames Gateway Sub-region. Going forward, the regional spatial strategy is being prepared by regional planning bodies, to be made up of at least 60 per cent of members from county councils and LPAs within its jurisdiction. Modifications to the draft RSS and final version will be issued by the Secretary of State.

Local Development Frameworks, will set out the LPA's policies for the development and use of land in its area and will include a portfolio of Development Plan Documents and Supplementary Planning Documents. Transitional arrangements enable existing local, structure and unitary development plans to continue for three years from commencement of the relevant part of the Act.

This policy review identifies emerging development plans such as the draft East of England Plan as well as adopted development plans including the adopted Thurrock Borough Local Plan.

3.2 National Policy

Planning Policy Guidance Notes (PPGs) and the emerging Planning Policy Statements (PPSs) provide a national guidance framework setting out a range of planning principles and objectives on specific topics.

PPG3 (Housing)⁸ has three key objectives: widening housing opportunities and choice; maintaining the supply of housing; and creating sustainable residential environments. The guidance promotes the efficient use of land for housing development through re-use of previously developed land and empty properties and the conversion of non-residential buildings for housing to meet housing demand and minimising the amount of greenfield land being taken for development. It provides advice on the provision of affordable housing as a means of creating mixed and balanced communities.

The update to PPG3 in January 2005 has increased the pressure on employment land by putting the onus on local authorities to prove the demand for such land. The new paragraph 42 (a) states:

⁸ This version is published in 2000 and updated in January 2005

'Local planning authorities should consider favourably planning applications for housing or mixed use developments which concern land allocated for industrial or commercial use in saved policies and development plan documents or redundant land or buildings in industrial or commercial use, but which is no longer needed for such use, unless any of the following apply:

- the proposal fails to reflect the policies in this PPG (including paragraph 31), particularly those relating to a site's suitability for development and the presumption that previously-developed sites (or buildings for re-use or conversion) should be developed before greenfield sites;*
- the housing development would undermine the planning for housing strategy set out in the regional spatial strategy or the development plan document where this is up-to-date, in particular if it would lead to over-provision of new housing and this would exacerbate the problems of, or lead to, low demand;*
- it can be demonstrated, preferably through an up-to-date review of employment land (refer to Annex D for practice guidance), that there is a realistic prospect of the allocation being taken up for its stated use in the plan period or that its development for housing would undermine regional and local strategies for economic development and regeneration.'*

The DCLG⁹ is in the process of replacing many of their PPGs with PPSs and the DCLG recently adopted PPS3 will replace PPG3 as the planning strategy for housing in England.

With regard to employment land and employment land review paragraph 41 states:

'When considering planning applications for housing which are received in advance of the relevant development plan document being reviewed (particularly first development plan document), local planning authorities should take into account the policies in this statement as material considerations, as they may carry greater weight than the relevant policies in the development plan. In these circumstances or for sites not allocated in the development plan, local planning authorities should consider favourably planning applications for housing development:

- where there is evidence of an imbalance between housing demand and supply, having regard to affordability issues and housing market conditions;*
- if the site is suitable for housing development (including land allocated or previously used for industrial or commercial use, which is no longer needed for that use – as demonstrated by an up-to-date review of employment land); and*
- the planning proposal makes efficient use of land, offers a good housing mix, is of high quality design and does not have an unacceptable impact on the environment.'*

PPG4 (Industrial, Commercial Development and Small Firms) notes that policies within the development plans should provide for choice, flexibility and competition in allocating land for industry and commerce. The guidance recommends that planning authorities should be realistic in their assessment of the needs of business.

⁹ Evolved from the ODPM in 2006.

3.3 Regional Policy

3.3.1 *Regional Planning Guidance for the South East (RPG9)*

RPG9 (adopted March 2001) covers the period up to 2016 and is intended to provide guidance to local authorities in the preparation of their local plans. It is worth noting that although Essex is covered in RPG9 for the South East, as part of the new planning framework, the regional boundaries have been changed and it is being covered in the East of England Plan (RSS14), which is also reviewed in this section. Relevant employment and economic development policies are listed below:

- Policy RE5 - better use should be made of existing employment land resources. Furthermore, it is advised that sites for industry and commerce should be developed particularly in urban areas and in places that are accessible by environmentally friendly modes of transport. Policy RE5 also states that precedence should be given to the re-use of developed land over the release of new land and wherever possible the intensification of use on existing sites should be encouraged.
- Policy RE6 - priority should be given to securing economic development in the Thames Gateway in accordance with the guidance and principles set out in RPG9a (reviewed in full below) or in any review of RPG9a.
- Policy RE9 - high-added value activities should be actively encouraged, including the grouped location of such activities in business clusters where this is economically beneficial and environmentally acceptable. To this end, local authorities are advised to form development plans, which include policies that serve to encourage existing and emerging clusters in the Thames Gateway and other regeneration areas.
- Policy RE10 indicates that economic diversity should be encouraged, facilitating small and medium enterprises, and supporting the growth of a variety of economic sectors including manufacturing.

In relation to housing provision on previously developed land, policy H5 states that local authorities in the South East should adopt a sequential approach to the allocation of land for housing and seek to achieve at least 60% of all new housing development on previously developed sites and through conversions of existing buildings.

3.3.2 *The Thames Gateway Planning Framework (RPG9a)*

In setting out its aspirations for helping the market to respond, RPG9a describes how future economic success of the sub-region will depend on the business community responding to the opportunities and having the confidence to lead. The strategy envisages that in the short term it will be those previously used sites without major preparation costs which will tend to be brought forward first. However, over time it is perceived that the more difficult sites will be brought forward, as public investment will be used to support the private sector. In addition, it perceives that increases in land values will also attract businesses to invest in brownfield sites with higher remediation costs.

The framework also comments on the potential for economic growth in the sub-region. It considers that much of the future growth will come from economic sectors already well established in the region, such as manufacturing (which presently accounts for 20% of all employment). Therefore it advises that development plans should provide a secure land use

context for existing industry and sufficient space for growth, as well as opportunities for new industry. The framework advises that in order to avoid the potential loss of employment, industrial areas that are not in conflict with this guidance should not be favoured for other forms of development.

3.3.3 The Draft East of England Plan (RSS14)

The draft East of England Plan (released in December 2004) is a new Regional Spatial Strategy for the East of England. It aims to guide development in the East of England for the next 20 years and covers housing, economic development, the environment, transport, sport and recreation, waste development, mineral extraction and more. The draft plan is also very much a jobs led strategy. The East of England Plan has been subject to an Examination in Public that ended in March 2006. The Secretary of State proposed changes that were published in December 2006.

Policy TG/SE1 (zones of change and influence) identifies as a world leading logistics hub and exemplar for community development, learning and enterprise, with a focus on:

Thurrock Riverside – developing a new urban focus between Purfleet and Tilbury to provide 7,600 additional homes and 2,400 additional jobs through regeneration of previously used sites, associated with revitalisation of existing town centres, a new ring road and railway station in West Thurrock, a strategic transport interchange at Grays and improved local transport networks.

The relevant policies for economic development are EM2 and EM3. Policy E2 sets out the projected job growth for the Thames Gateway South Essex sub-region, which is targeted at 55,000 of the plan period (2001-2021). This constitutes almost half of the total job creation for the County of Essex (116,000). Policy TG/SE2 indicates that Thurrock will need to accommodate 26,000 jobs over the plan period.

Policy EM3 sets out the recommended approach to employment land allocation that local authorities should take. It states that Local development documents will allocate employment land to provide a range of sites and premises to meet the quantitative and qualitative needs of business within the sequential approach of the core spatial strategy, and job growth targets of policy EM2, enabling urban renaissance, economic regeneration, social inclusion and rural diversification.

Policy EM3 also advises that efficient use will be made of existing employment land resources. Sites for industry and commerce should therefore be provided in:

- *Urban areas and key market towns*
- *Locations that minimise commuting, and promote more sustainable communities, and a closer relationship between jobs and existing or proposed labour supply*
- *Locations where the maximum use of sustainable (public) transport can be made*
- *Locations and ways that minimise loss or damage to environmental and social capital, and so far as possible substitute for losses and secure positive enhancements. This will often mean giving precedence to the re-use of previously developed land and, wherever possible, the intensification of use on existing sites over the release of greenfield land*

- *Locations that meet the needs of the region's significant clusters as set out in the Regional Economic Strategy.*

Significantly for the context of this study, policy EM3 states that land in employment use will be considered for alternative uses only where a completed employment land assessment demonstrates that sufficient land is available, of an appropriate type, range, quality and quantity, to ensure that the Regional Economic Strategy's objectives are achievable.

In relation to housing, policy H1 states that a total of 478,000 dwellings¹⁰ will be built in the East of England region over the plan period, of which 18,500 will be built in the Thurrock Unitary Authority area (which equates to an annual average of 925).

3.3.4 The Regional Economic Strategy for the East of England

The fourth goal of the Economic Strategy for the East of England is to create high quality places to live, work and visit. Part of this goal revolves around ensuring that the region has a high quality supply of business land and premises. The policy states that a key element in achieving a balance of housing and jobs is developing employment sites that support business growth and ensure the economic viability of local communities. The strategy recognises that urban brownfield employment sites are increasingly under pressure to be developed for housing. While it acknowledged that the long-term vacancy of derelict employment sites can harm a town's image and undermine confidence, the strategy also recognises the importance of retaining existing employment sites where possible and appropriate. Only sites that no longer meet regeneration and growth objectives should be made available for alternative uses.

In relation to employment it states that:

"The scale of employment site provision and job growth should meet the needs specified in the draft regional spatial strategy. This provision must recognise the needs of different sectors and clusters such as knowledge-based activities adjacent to the region's higher education and other research centres. Employment site provision in the Growth Areas (such as the Thames Gateway) and within the London Arc is necessary to enable balanced job and housing growth, provide choices for business and reduce dependency on London. Support for innovation by new and growing businesses through enterprise hubs and innovation centres will be important in this respect".

3.4 Local Policy

3.4.1 Thurrock Borough Local Plan (1997)

The Thurrock Borough Local Plan was adopted by the Council in September 1997 and as the saved plan still provides the Council with its policies and proposals for land use in Thurrock and provides the basis for decisions on land use planning.

Two of the Council's objectives relate directly to employment. These are:

¹⁰ The Secretary of State proposed changes increases this to 508,000 dwellings.

- *To allocate land able to accommodate a diversity of jobs suitable for local people (Objective 5).*
- *To distribute employment more widely across Thurrock by identifying significant development opportunities in a variety of locations (Objective 6).*

Policy E1 lists the Borough's primary land for industrial and commercial development. In relation to this, it states that development for purposes which neither generate employment nor are related to employment uses will only be permitted where this would neither take land otherwise available for industrial and commercial development nor have an adverse effect on existing employment generating uses.

Primary industrial and commercial areas are described as *having good existing access to the strategic/principal road network, without vehicles having to travel through residential areas, or are the subject of road improvement proposals in this Plan.* These are listed below:

- Purfleet Industrial Park, Aveley
- Botany Quarry/Tank Lane, Purfleet
- London Road, Purfleet
- Dolphin Estate/Lafarge, West Thurrock
- Lakeside/Waterglade Estates, West Thurrock
- West Thurrock Marshes
- Chafford Hundred North West Zone
- Thurrock Park, Little Thurrock
- Tilbury South
- Tilbury Power Station, North

The Council considers that the retention of employment-generating uses in these areas, together with the major new development set out in Policy E2, is essential to ensure a significant net increase in jobs in Thurrock over the Plan period. It suggests that use of land for non employment generating uses would not only reduce the land available for industrial and commercial use, but could also have an adverse impact on existing industry. The Plan considers that residential development in the vicinity of industrial use may result in pressure from new residents to curtail existing industrial uses.

Policy E2 lists all land for new industrial and commercial development in primary areas:

Figure 3.1

E2 LAND FOR NEW INDUSTRIAL AND COMMERCIAL DEVELOPMENT IN PRIMARY AREAS		
Land is identified within primary industrial and commercial areas for new industrial and commercial development and the expansion of existing firms as listed below and shown on the Proposals Map.		
		Hectares
(a)	Purfleet Industrial Park	2.8
(b)	Tank Lane/ Arterial Road, Purfleet	3.1
(c)	Botany Quarry, Purfleet	3.6
(d)	Former Coalyard Site, Purfleet	2.8
(e)	Former Thames Board Mill South Site, Purfleet	3.5
(f)	Esso North Site, Purfleet	16.0
(g)(Esso Middle Site, Purfleet (now developed)	2.3
h)	BP North Site, Purfleet (now developed)	6.8
(i)	Van Den Bergh and Jurgens, Purfleet	13.6
(j)	Greenlands Quarry, Purfleet	23.5
(k)	Former Stork Club Site, Purfleet (now developed)	5.7
(l)	Stonehouse Lane/Arterial Road, Purfleet	1.6
(m)	Bluelands East Quarry, West Thurrock	11.4
(n)	The Red House Site, West Thurrock (now developed)	1.4
(o)	885-901 London Road, West Thurrock	0.2
(p)	Lafarge Jetty Site, West Thurrock	1.2
(q)	Tunnel Estate, West Thurrock	3.6
(r)	South of London Road, West Thurrock	1.0
(s)	Tunnel Jetty, West Thurrock	3.6
(t)	Motherwell Way, West Thurrock	0.5
(u)	Lakeside Trading Estate, West Thurrock	24.0
(v)	North of Oliver Road, West Thurrock	1.6
(w)	Riverside Estate, West Thurrock	0.7
(x)	St. Clements Road, West Thurrock	2.3
(y)	Wouldham Works, South Stifford	9.6
(z)	Chafford Hundred North West Zone	5.2
(aa)	Thurrock Park, Little Thurrock	16.1
(bb)	Tilbury South	26.8
(cc)	Tilbury Power Station, North	14.3
(dd)	Bluelands West Quarry, West Thurrock	7.0
	TOTAL	215.8

Source: Thurrock Borough Local Plan (1997)

Policy E3 lists development within secondary industrial and commercial areas. These are described as areas that do not have direct access to the strategic/principal road network without going through residential areas and/or are close to housing. The areas listed are:

- Aveley Industrial Estate, South Ockendon
- Marley Works, Stifford Road, South Ockendon

- Milehams Industrial Estate, Purfleet
- London Road/Schoolfield Road, West Thurrock
- 434-436 London Road, West Thurrock
- Gumley Road, South Stifford
- Chafford Hundred North East Zone
- Titan Pit, Grays
- Grays West
- Grays South - Argent Street
- Grays South - Thames Road
- Grays South - Manorway
- Globe Works, Little Thurrock
- Coward Bros./Star Groundwork, Linford Road, Chadwell St. Mary
- Sandy Lane Pit/Martintrux, Linford Road, Chadwell St. Mary
- Bata/Thames Industrial Park, East Tilbury
- Baryta Close/Victoria Road, Stanford-le-Hope
- Stanhope Industrial Estate, Wharf Road, Stanford-le-Hope

Policy E4 identifies land for new industrial and commercial development in secondary areas and expansion of existing firms. These are listed below:

Figure 3.2

E4 LAND FOR NEW INDUSTRIAL AND COMMERCIAL DEVELOPMENT IN SECONDARY AREAS		
Land is identified within secondary industrial and commercial areas for new industrial and commercial development and expansion of existing firms as listed below and shown on the Proposals Map. Any development of these sites will be expected to conform to Policy E3.		
		Hectares
(a)	Chafford Hundred North East Zone	4.4
(b)	Titan Pit (North), Grays	4.5
(c)	Stanhope Industrial Park, Stanford-le-Hope	4.6
(d)	Bata/Thames Industrial Park, East Tilbury	3.4

Source: Thurrock Borough Local Plan (1997)

Other relevant employment policies are E5, E6, E8, E9, E11, E12, E13, E14, E15 and E16. In summary these state that:

- E5: Industrial and commercial development and redevelopment will only be permitted outside the industrial and commercial area identified in policies E1 and E3, where the development will neither cause material harm to the environment, nor generate unacceptable levels of traffic, and where the development proposed conforms to other policies in the Plan.

- E6: Where an existing industrial or commercial use outside the areas designated under policies E1 and E3 causes a particular environmental or traffic problem, the Council will consider its redevelopment for alternative uses of a type which would solve the problem.
- E8: New oil refining activities will only be permitted within the existing refinery complexes at Shellhaven and Coryton, or on adjacent land specified for their expansion. The existing sites and specified expansion areas include areas of 48.2 hectares at Shellhaven and 45.3 hectares at Coryton.
- E9: New oil and chemical storage activities will only be permitted within the sites set out in Policy E8 and also in existing oil and chemical storage sites at Purfleet, West Thurrock and South Stifford, or on specified expansion sites
- E11: The major location for office development will be Grays Town Centre and provision is made for up to 50,000m² of office floorspace.
- E12: Small office developments of up to 1,000m² will be permitted in the town centres of Stanford-le-Hope, Corringham, Tilbury, South Ockendon, Aveley and at the Armada Centre and Station site at Chafford Hundred.
- E13: Office development will not normally be permitted outside town centres, except where it is clearly ancillary to an industrial or commercial development on the site. 'Business Park' type developments will, however, be permitted in industrial and commercial areas, provided they meet environmental and other policies in the Plan.
- E14: Hotel development on land identified for industrial and commercial purposes, or on sites in Grays Town Centre, will be permitted subject to meeting other policies in the Plan
- E15: In the Bluelands Quarries, west of the M25, the Council will only permit higher quality employment generating development
- E16: The redevelopment of the West Thurrock Power Station site should incorporate employment generation, nature conservation and environmental improvements, replacement for the open space, contribution to the financing of road improvements and other infrastructure improvements in the area.

Other Council objectives relevant to employment relate to the Riverside. Objective 11 proposes "to safeguard and enhance the riverside in its various roles as a unique feature in the Borough". In particular the most relevant element of this approach is:

To seek to retain the existing wharfage operations and encourage the creation of new river frontage industrial and commercial uses related to water transport, within the immediate riverside areas

Relevant riverside policies that affect employment include RIV1, RIV1A and RIV2.

In relation to housing, Policy H1 states that the Council will ensure that sufficient land supply is identified for 9,900 dwellings between 1986 and 2001 (in line with Structure Plan requirements). The Council calculates its total net supply for the period to be 13,127.

Other relevant housing policies are H2, H3, H4, H8, H10, and H11.

3.4.2 Draft Thurrock Unitary Development Plan (2003)

The Thurrock Unitary Development Plan was placed on deposit on 28th March 2003. This is a single plan document that was intended to replace the Local Plan, detailing the Council's planning policies up to 2016. Following the Thurrock Council Cabinet decision of 15th

September 2004, the Council has suspended any further work on the Unitary Development Plan. The Thurrock Deposit UDP has not however been formally withdrawn at this stage.

Policy EMP2 below identifies land within primary industrial and commercial areas for new industrial and commercial development and the expansion of existing firms. These are listed below:

Figure 3.3

EMP2 LAND FOR NEW INDUSTRIAL AND COMMERCIAL DEVELOPMENT IN PRIMARY AREAS		
Land is identified within primary industrial and commercial areas for new industrial and commercial development and the expansion of existing firms as listed below and shown on the Proposals Map.		
		Hectares
(a)	Purfleet Industrial Park, Purfleet	2.8
(b)	Tank Lane/ Arterial Road, Purfleet	3.1
(c)	Botany Quarry, Purfleet	5.2
(d)	Former Coalyard Site, Purfleet (part Mixed-use)	0.7
(e)	Former Thames Board Mill South Site, Purfleet	3.5
(f)	Van Den Bergh and Jurgens, Purfleet	13.6
(g)	Greenlands Quarry, Purfleet	23.5
(h)	Stonehouse Lane/Arterial Road, Purfleet	1.6
(i)	Bluelands East Quarry, West Thurrock	11.4
(j)	Bluelands West Quarry, West Thurrock	7.0
(k)	885-901 London Road, West Thurrock	0.2
(l)	Lafarge Jetty Site, West Thurrock	1.2
(m)	Tunnel Estate, West Thurrock	2.0
(n)	South of London Road, West Thurrock	1.0
(o)	Tunnel Jetty site, West Thurrock	3.6
(p)	Motherwell Way, West Thurrock	0.5
(q)	Lakeside Trading Estate, West Thurrock	6.9
(r)	North of Oliver Road, West Thurrock	1.6
(s)	St. Clements Road, West Thurrock	2.3
(t)	Wouldham Works, South Stifford	9.6
(u)	Thurrock Park, Little Thurrock	6.8
(v)	Tilbury South	26.8
(w)	Tilbury Power Station	28.8
(x)	Shell Haven	200.0
(y)	Former West Thurrock Power Station	<u>36.0</u>
TOTAL		396.7

Source: Thurrock UDP deposit (2003)

The most significant change to the supply of primary industrial land, between Policy E2 of the Thurrock Local Plan and Policy EMP2 of the Thurrock UDP is the inclusion of the Shell Haven site in the latter, which totals 200 hectares. In addition, approximately six other smaller sites have been excluded from Policy EMP2 of the UDP as they have been developed over 1997-2003 period.

In addition, Policy EMP4 identifies 10.3 hectares of land for new industrial and commercial development in secondary areas, as oppose to the 16.9 hectares that is identified within Policy E4 of the Thurrock Local Plan.

The Riverside objectives set out in the Local Plan are expanded upon in the UDP. Elements of objective 9 propose:

- (a) To support the continued functioning of Tilbury Docks and other riverside activity, while minimising environmental impact; and*
- (b) To make provision for growth in port traffic by the limited expansion of existing port facilities and the development of new facilities in an appropriate location*

Relevant riverside policies that affect employment include RIV1, RIV2 and RIV3.

Policy HOU1 lists outstanding planning permissions for housing on 31st March 1998 (in total 4,294 net dwellings are identified). In addition Policy HOU2 identifies non-residential land for housing for the period 1998-2016 (with an estimated capacity of 4,615 housing units). In total the net supply meets the strategic provision (1998-2011) of 9,674.

Other relevant housing policies in the UDP Deposit Draft include HOU3, HOU7, HOU9 and HOU10.

3.4.3 Thurrock Local Development Framework

The Local Development Framework (LDF) is also part of the new development plan system introduced by the Planning and Compulsory Purchase Act 2004. Under this new legislation the Essex Structure Plan, the Essex Minerals Plan and the Thurrock Local Plans (including the suspended UDP Deposit Draft), will be replaced by new types of development plans. At the regional level there will be a Regional Spatial Strategy for the East of England (as set out above). At local level there will be a portfolio of statutory and non-statutory Local Development Documents known collectively as a Local Development Framework (LDF). The LDF will set out the policies and proposals to guide the development and use of land in the Borough up to 2021. Thurrock Borough Council is in the pre-production phases of their LDF. In accordance with Section 15 of the Planning and Compulsory Purchase Act, the Council has prepared a Local Development Scheme (LDS) that sets out the Council's project plan for the production of documents, plans and policies that are to be included in the LDF by 2008. The Council has entered into a Service Level Agreement with the Planning Inspectorate to agree the timetable set out in the LDS, which is currently being revised.

The LDF will be a portfolio of Development Plan documents and Supplementary Planning Documents (SPDs). Development Plan documents will include a Statement of Community Involvement and a Core Strategy setting out the vision, spatial strategy and core policies for the spatial development of Thurrock Council. The Core Strategy is the main overarching document within the LDF process.

The Development Plan documents will also set out site-specific allocations of land, Area Action Plans (AAPs) and include a proposals map. Thurrock is proposing a Core Strategy Development Plan Document (DPD) and separate Site Allocations and a Policies DPD. Site Allocations and Policies DPD will set out various site-specific proposals and policies. DPDs will shortly be subject to issues and options consultation and are at an early stage in the plan preparation process.

3.4.4 Thurrock Council Development Briefs

The Council has also produced a series of development briefs for key employment sites in the Borough.

Grays Town Centre North (2000)

The development brief identifies two interrelated sites within the Town Centre boundary – George Street and Hogg Lane. The key elements of the Local Plan Objective 12 are *to maintain Grays Town Centre as the principal commercial and administrative centre for Thurrock* and *to develop Grays as a major office and administrative centre in the Borough*.

The development brief therefore suggests that the George Street site would be suitable for further retail development (of the convenience good variety). Other commercial uses or a mix thereof, such as leisure and entertainment facilities, a hotel or office development may be acceptable. The Hogg Lane site is identified as being primarily suitable for office development, with leisure and entertainment and a hotel also considered appropriate.

West Thurrock Power Station (1998)

The Council states that any redevelopment of the West Thurrock Power Station site will consist of employment generating uses in accordance with planning objectives for the site. Given its location on the river, the Council also considers that the site has the opportunity for a high quality of development including employment generating use within a single or mixed use scheme, which forms part of a comprehensive scheme for appropriate development of available land.

The Council would prefer to see the site is developed for port and other river related commercial and industrial uses. Other employment generating uses within classes B1, B2 and B8 may be considered.

3.5 Thurrock Thames Gateway Development Corporation (2003)

The Thurrock Thames Gateway Development Corporation (TTGDC) has been given the responsibility of facilitating the growth, development and regeneration of Thurrock, the expectation being that this will drive a significant increase in housing provision as well as improvements in employment and education. The TTGDC also began exercising its development control powers from 12 October 2005 and has been given responsibility for dealing with significant planning applications and master planning.

The Thurrock Thames Gateway Development Corporation has prepared a Regeneration Framework and consulting on its own Spatial Plan. The Regeneration Framework sets out the vision, strategy and processes of implementation to achieve its objectives for regeneration in Thurrock and includes six key challenges and nine strategic goals through which growth and regeneration will take place. The Spatial Plan will show the preferred locations for new development, major infrastructure and types of initiative to secure regeneration.

The TTGDC has also commissioned consultants to prepare Master Plans to set out in spatial terms the detail of its Regeneration Framework and Spatial Plan for specific areas of the borough. These are all non-statutory plans. Currently draft Masterplans have been prepared for Purfleet, Lakeside and Grays which are currently subject to consultation. Additional Masterplans are to be prepared for other areas of the borough.

Throughout the early research period of this study, TTGDC was unable to provide the consultants with any details on its Regeneration Framework and Spatial Plan for the Borough

so recommendations from this report could not be compared to the plans of the TTGDC. However, the consultants were able to obtain a copy of the Regeneration Framework during the later stages of this report and the key relevant policies are summarised within the next section (Literature Review). The TTGDC have also been undertaking consultation on the Spatial Plan and a number of Master Plans for areas including Purfleet, Grays and Lakeside/West Thurrock. However proposals for sites were not finalised at the completion of this study.

4 LITERATURE REVIEW

4.1 Introduction

This section gives a brief review of key research reports including those supporting national and regional policy development.

4.2 ODPM Sustainable Communities Plan (2003)

“Building for the future” sets out the Government’s aim of a step change to deliver successful, thriving and inclusive communities. To accommodate the economic success of London and the wider South East and to ensure that the international competitiveness of the region is sustained, four key growth areas have been identified at Ashford, Milton Keynes, Stansted/M11 Corridor and the Thames Gateway.

The regeneration of the Thames Gateway is perceived as a broad based project that aims to accommodate significant housing and economic growth, by utilising development of brown field land and through urban renewal and by placing strong emphasis on the environmental quality of green open space and the public realm.

4.3 Thames Gateway South Essex sub-Regional Strategy (2005)

Technical Background Paper

The purpose of this paper is to set out technical background information and interpretation in support of the sub-regional strategy for Thames Gateway South Essex contained in the draft East of England Plan. It has been produced by the Thames Gateway South Essex Partnership (TGSEP), which is responsible for co-ordinating implementation and delivery of the Thames Gateway initiative in South Essex.

The document sets out goals for the sub-region, one of which is to achieve employment-led regeneration and wealth creation. It states that without improvement in the economy it will be difficult to transform the area into a sustainable community. Currently, the sub-region has 300,000 residents in employment, but supports a workforce of 233,000 employees. This situation points to underlying “weaknesses” in the sub-regional economic structure in terms of the quantity, quality and range of opportunity in local job availability. The key objective for the sub-region is to achieve regeneration through jobs-led growth, higher levels of local economic performance and employment, and a more sustainable balance of local jobs and workers.

4.4 Thames Gateway South Essex “A Vision for the Future”

This document sets out the vision for the future for Thames Gateway South Essex. The overriding aim of the partnership *is to provide an improved quality of life for all the people of South Essex and to allow the area to participate, via the Thames Gateway initiative, in the prosperity of the wider South East and East of England.* The partnership identifies three regeneration hubs at Thurrock, Basildon and Southend.

With regards to Thurrock, the document identifies Shell Haven as a major opportunity, which has the potential to improve the competitiveness of Thames Gateway South Essex in import/export terms. Additional forecasted potential benefits of Shell Haven are said to include

port related employment growth, commercial development and highly skilled logistics employment growth.

4.5 Thames Gateway and Essex Report 2005-2006

Commercial property analysis by Kemsley, Whitely and Ferris Chartered Surveyors

In analysing the regional submarket the commercial surveyors identify Thurrock as the hub of industrial/warehousing activity in South Essex. In addition they note that there is actually more office space available within industrial and warehouse properties than in stand-alone office properties.

The report predicts that should it gain approval, the Shell Haven scheme will have its first buildings occupied by the end of 2006, with King Sturge acting as the property agents.

In February 2003 the Office of the Deputy Prime Minister announced that, as part of the Government's Sustainable Communities Plan, an Urban Development Corporation would be established in Thurrock to drive forward regeneration of the area. Following consultation, this Corporation became a legal entity in October 2003 and became operational as from January 2004.

4.6 The Transport and Logistics Sector of Thurrock and South Essex

Research Study 2002/2003 by Academy of Logistics and transport and Thurrock Business Forum

The report, funded by the Thames Gateway South Essex partnership, focuses on the unique strategic location of Thurrock, as determined through its comprehensive trunk road links and river access. The report calculates that logistics and transport account for approximately 15% of total employment in the Borough, indicating the importance of this sector to the Thurrock economy.

The key conclusion of the report is that while further development of the logistics sector (including the proposed Shell Haven schemes) has the potential to provide additional employment for local residents (including the unemployed), there is a shortage of relevant skills among the populace to meet this demand and insufficient training places available at present at local colleges to satisfy the forecast demand.

4.7 Bone Wells Employment Study (2004)

Thurrock Council commissioned Bone Wells Associates to conduct an employment study for the Borough in September 2004. The study was intended to test the validity of employment forecasts for Thurrock in emerging strategies and to identify local requirements in terms of the job/worker balance, potential business sector growth and company site requirements.

Their main findings were that:

- *The physical factors most likely to accelerate development in Thurrock are transport improvements including those to the West Thurrock Regeneration Ring Road, the A13, Crossrail, and Stansted Airport. In addition, new links in East London, including the proposed new river crossing, will further improve accessibility and thus add to*

Thurrock's relative economic advantage. Bone Wells consider that even without Shell Haven rapid growth seems set to continue.

- *The Draft East of England Plan (DEEP) proposes a policy target of 26,000 additional jobs for Thurrock between 2001 and 2021, which assumes that Shell Haven will go ahead and that there will be a take up of land along Thurrock Riverside. Bone Wells do not consider that this will be achievable by 2021, nor will the lower figure that is discussed of 19,000.*
- *Looking forward to 2021 the basic elements of potential employment growth in Thurrock fall into three categories: 6,800 trend growth, 8,000 net Shell Haven increment at fast development, and 1,300 from impact of the UDC. This amounts to about 16,000 potentially achievable jobs.*
- *If 8,000 jobs in Shell Haven are treated as incoming, the remaining 8,000 increase would be accounted for by existing business.*
- *The Borough may have about double the land it needs to meet requirements. Excluding Shell Haven, there is demand for approximately 100 hectares but supply for approximately 180 hectares. Therefore it may be possible to transfer about half of the designated employment land to other uses. However, because some of the gross supply has been transferred to residential use the surplus will have been reduced.*
- *The survey that was conducted pointed to existing B2 and B8 occupiers as the main sources of land demand by quantity in the short term, although half the potential firms anticipating a need for new sites were B1 occupiers.*
- *Distribution companies continue to favour sites close to the M25, while office users prefer both business parks and town centres. Bone Wells believe that it is important to cater for both types of location, i.e. not try to force all office uses to locate in town centres.*
- *Few of the companies surveyed reported that their premises were of poor quality, more being concerned about their location. This often related to transport issues.*
- *Companies interviewed considered that transport was a major issue, particularly remedying deficiencies in the road infrastructure, although public transport was also seen as dire.*
- *To attract new businesses and to realise latent demand, a high priority should be to increase marketing and promotion of Thurrock as an investment location, and to provide incentives to develop office space at the various locations and different sizes described.*
- *Thurrock can achieve the draft DEEP (RSS14) target housing growth of 18,500 dwellings, although employment growth is only likely to equate to 16,000 jobs.*

4.8 Transforming and Revitalising Thurrock: A framework for regeneration and sustainable growth (2005)

The regeneration framework sets out a list of nine strategic goals through which the TTGDC believes that regeneration will take place within Thurrock, of which two directly relate directly to employment. Strategic goal one is to *contribute to the provision of sufficient capacity to*

meet strategic growth targets including 26,000 new jobs and 18,500 new homes in sustainable way by 2021.

Strategic goal three is to *create a wide range of jobs with a future*. By this the TTGDC aspires to create sustainable jobs and not just jobs per se.

In addition, the regeneration framework analyses the business and employment bases within Thurrock. In summary it identifies that within Thurrock's employment base there is:

- An over reliance on transport, logistics and retail sectors and some sectors aligned with manufacturing, such as petroleum processing
- Under representation in certain industries including finance and business services, knowledge and technology intensive industries, high tech industries
- Reliance on large employers, with lower than average small and medium size employers in existence

The framework strategy proposes three spatial growth scenarios to facilitate the growth of Thurrock including:

- Development or redevelopment between existing settlements and the Thames
- Redevelopment and development around existing train stations
- Redevelopment and development of two major urban cores, one in the west, one in the east.

4.9 RSS14 Housing and Employment Alignment Study (2004 and 2005 update)

This study was prepared by consultants on behalf of the East of England Regional Assembly and East of England Development Agency. It is essentially a technical study, tasked with examining linkages with policies H1 (distribution of housing provision) and E2 (job growth) as set out in the 'banked' RPG 14 (dated February 2004). This analysis aims to identify how 'aligned' both policies are, and what the strengths and weaknesses are in the link between them. This is with a view to inform EERAs consideration of revisions to RSS14 and evidence and submissions at the public examination.

The consideration of alignment is based on the balance of jobs within the area of analysis over the number of workers actually employed in the area. The job figure takes account of the fact that many people undertake two jobs (known as 'double jobbing'), so represents the number of people employed in the area. The worker figure represents the number of people working in the region after net-commuting (i.e. both in and out of the area) has been taken into account. Technically therefore, if there is 'alignment' these figures should be equal.

The study highlights the evolution of both the Employment (Policy E2) and Housing (Policy H1) policies and analysis of the various job and population projections used to support these policies. A methodology is set out in the study to assess the degree of alignment between housing and jobs and a base model and variations of it used to assess alignment at both regional and sub-regional level. The study recognises that a number of assumptions have been made regarding the data, methodology and sub-regional areas. The report also recognises that Policy E2 includes aspirational policy aims compared to the results of many trend-based forecasts.

The study indicates that in 2001 there is a surplus of workers over jobs in the region indicating that there is current misalignment. However application of the Policy H1 and E2 would result in a significant reduction in misalignment by 2021. The conclusion at the regional level is that the policies are broadly aligned compared to each other (as net change) and contribute to an improvement in absolute terms for regional alignment by 2021.

At sub-regional level alignment results are more varied. For the Thames Gateway using the base model a current misalignment at 2001 of 50,000 more workers than jobs is reduced by 2021 to under 24,000. The policies are moving the sub-region closer to alignment.

An update to the alignment study in 2005 used some more recent population forecasts including age specific migration down to district level. This resulted in a lower labour supply compared to original base study. A number of scenarios were included in the update study and the main conclusion was that new forecasts for the region and Thames Gateway sub-region resulted in closer alignment between jobs and workers.

4.10 Thurrock UDC Baseline Study (2004)

Thames Gateway Strategic Executive, within the Office of the Deputy Prime Minister, appointed MCA Regeneration and consultants from Cluttons Planning & Development and Ernst & Young to provide a detailed report setting out the social, economic, environmental and physical characteristics of Thurrock Unitary Authority area. The study's aim was to provide ODPM with a robust analytical and statistical report, with commentary on the critical priorities, which should be measured to track UDC progress.

They summarised their key findings in relation to economy as follows:

- *Thurrock has experienced above-average employment growth overall, largely based on Lakeside retail centre and park.*
- *Port and related transport logistics, distribution and industrial activity is a second major sector strength, along Thurrock's river and estuary front.*
- *In regional strategy terms, Thurrock has not been a focus of attention for economic development and 'competes' for attention with the Cambridge/M11 corridor and other disadvantaged centres (Luton, Harlow).*
- *Agency partners in Thurrock are aware of local strengths and weaknesses and the need to develop a more balance sector structure in the economy, based on higher-skilled activity.*
- *Employment is now heavily concentrated in West Thurrock, around M25 junctions and the Dartford crossing. This places a heavy traffic burden on roads. There is also a problem with industrial areas being adjacent to residential areas.*
- *The industrial areas to the north (Aveley / Ockendon) and east (Coryton) have experienced greater economic decline and therefore are in need of restructuring and renewal.*
- *The port logistics sector is facing a critical stage of development, with the prospects of either massive upgrading via P&O London Gateway at Shell Haven, or possible decline through UK ports competition.*

- *Business and commercial sectors are currently weak in Thurrock and require a comprehensive long term strategy, in terms of location, premises, environment, marketing, high-profile investors, an SME strategy and altered labour market patterns. Lakeside-linked sites and Shell Haven present opportunities.*
- *There are mixed fortunes in manufacturing. Opportunities exist to align construction-related industries to future residential, commercial and civil building plans in the Thames Gateway.*
- *In general, small firm enterprise has been low and over-dependence on large firms risks (presently healthy) employment in future.*

4.11 ASPIRE Community Strategy for Thurrock (2003)

In January 2002 ASPIRE - the Local Strategic Partnership (LSP) for Thurrock was formed. The following year (2003) they launched their draft community strategy entitled *Shaping Thurrock*, which set out the following vision for the next twenty years:

Thurrock will be a place for enterprise and skills, which builds on the heritage and prosperity of the River Thames and welcomes new opportunities for trade.

It will be a place where people feel included and where our diverse communities can build a safe, healthy, vibrant area in which they are proud to live, work and play.

The purpose of the strategy is to secure the long-term welfare of Thurrock by:

- enabling communities to express their aspirations, needs and priorities and build on their strong sense of community identity and spirit
- coordinating activities to meet these needs
- focusing on the regeneration of Thurrock while balancing renewal with protecting the environment
- improving the economic, social and environmental wellbeing of Thurrock and its people
- reducing health inequalities
- involving users in the planning and delivery of services

However, currently the strategy is being revised in order to ensure alignment with the Sustainable Communities Plan.

5 SOCIO-ECONOMIC STRUCTURE

5.1 Introduction

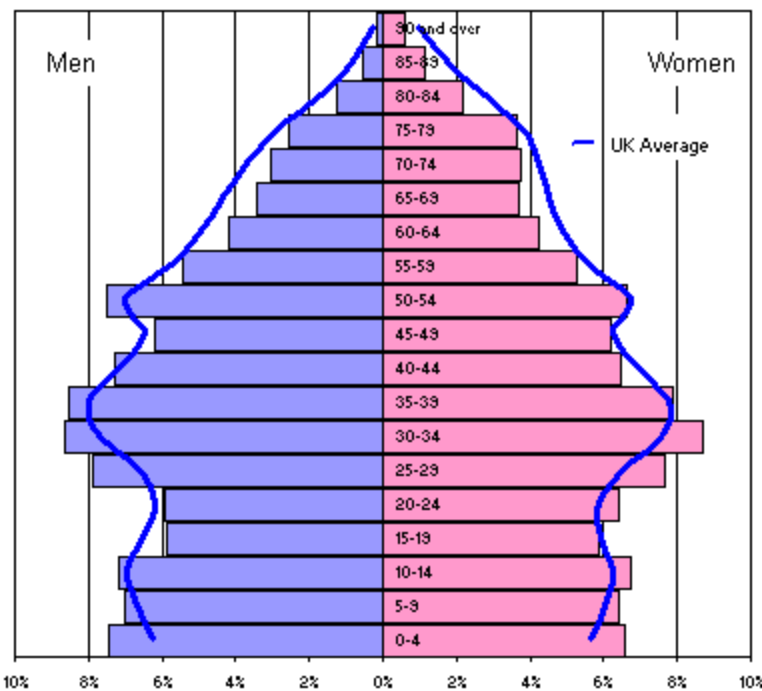
It is helpful to consider current demand and future provision of employment land in the context of the socio-economic structure of the area. Creating sustainable communities includes providing for employment suitable to the local workforce. Therefore this section analyses the socio-economic structure of the Borough of Thurrock and makes some comparisons with the East of England and the rest of England (or Great Britain, depending on the source).

5.2 Population

Thurrock has experienced a modest increase in population. In 1993 the population was 131,600 people and had increased by 9.4% in 2003 to 145,300 people. Thurrock's population made up about 2.5% of the total East of England population.

The population is 48.7% male and 51.3% female and over 15% of the population is of retirement age. The average age of residents in Thurrock is 36.6 years and 56% of the population is between 20 and 59 years old. Figure 5.1 below summarises the age distribution amongst men and women throughout Thurrock. This is a similar distribution as that occurring across neighbouring counties, the East of England and Great Britain.

Figure 5.1 Population Distribution



Source: ONS, Mid-year population estimates, 2005

Approximately 43% of Thurrock residents are married and 71.6% live in owner occupied dwellings. A considerable number of Thurrock residents live in council managed or registered social housing, with 20.4% of residents residing under this form of tenure. This figure is

slightly higher than the East of England (18.6%) and higher than that of the whole of England (17.9%). In 2003, there were 58,485 households in Thurrock and the average household size was 2.4 people.

Table 5.1 Summary of Population Characteristics

	<i>% of resident population</i>		
	Thurrock	East of England	England
Age Groups			
0-19	32.3	25.0	24.8
20-59	50.3	53.8	54.4
60-74	11.1	13.6	13.2
75+	6.2	7.6	7.6
% Married residents (aged 16+)	42.7	45.2	42.5
Tenure			
% Living in Owner Occupied	71.6	74.9	71.2
% Living in Council or RSL	20.4	18.6	17.9
% Living in Private Rented	7.6	6.47	10.9
Occupational Group			
% Of over 16s employed in AB ¹¹	16.6	23.5	22.2
% Of over 16s employed in C1	30.1	30.4	29.7

Source: Census 2001

5.3 Workforce

Thurrock's workforce is employed in a range of occupations, which includes 34% of people working in managerial, professional and associate professional occupations. Table 5.2 below provides more detail.

Table 5.2 Employment by Occupation

	Thurrock (numbers)	Thurrock (%)	East of England (%)	GB (%)
Managers and senior officials	9,300	12.5	16.1	14.9
Professional occupations	6,400	8.5	12.4	12.4
Associate professional & technical	9,300	12.4	13.8	13.9
Administrative and secretarial	12,700	17.0	12.9	12.7
Skilled trades occupations	8,400	11.3	11.9	11.3
Personal service occupations	5,800	7.8	7.4	7.7
Sales and customer service	6,800	9.1	7.1	7.8
Process plant & machine operatives	6,800	9.1	7.1	7.5
Elementary occupations	8,700	11.6	11.3	11.6

Source: Local Authority Profile for Thurrock, ONS 2005

Earnings by Residents

The average gross weekly earnings for Thurrock residents are £417, which is slightly less than of the rest of the East of England and Great Britain. Table 5.3 below summarises Thurrock's

¹¹ Occupational Group AB: Higher and Intermediate managerial/administrative/professional.

average weekly earnings in comparison to the surrounding region and Great Britain as a whole. Figures need to be treated with care as the reliability of statistics at a Borough level is limited due to a small sample size.

Table 5.3 Average Gross Weekly Earnings

Borough/Region	Average Gross Weekly Earnings
Thurrock	£417
Eastern Region	£447
Great Britain	£423

Source: Annual Survey of Hours and Earnings, 2004

Travel to Work

On average, residents of Thurrock travel around 15.5km to their place of work each day. Most people tend to drive to work with 64% of people either driving to work or being a passenger. Only 18.7% of people use public transport to get to and from work.

Activity Rates and Unemployment

In 2003, 63.2% (91,800) of the population were of working age in Thurrock and 81.1% of those people were economically active. This is in-line with economic activity rate for the Eastern region (81.7%) and slightly above the rate for Great Britain (78.2%). The unemployment rate in Thurrock is 3.2%, which is less than that of the East of England and Great Britain.

The unemployed made up 3.2% of economically active people in Thurrock in 2005. There were 2,094 Jobseeker’s Allowance (JSA) claimants (2.3% of the working age population). The unemployment figure is comparable to the East of England Region and less than the rate for Great Britain of 4.8%.

There are 17,500 (18.9%) people considered to be economically inactive in Thurrock and 13,200 of those are considered not to want a job. These figures are comparable to the East of England Region and slightly less than that of Great Britain where economic inactivity is reported for 21.8% of the working age population.

Occupational Group C1: Supervisory clerical junior managerial/administrative/professional.

5.4 Local Economy and Businesses

Since 1993, Thurrock has experienced a gradual growth in jobs in the Borough. The number of people employed in Thurrock has increased by 23% to the 2003 level of 56,681 people working in the Borough.

Employment in the construction sector saw the largest percentage increase in local jobs – growing by 177% between 1993 and 2003. The largest absolute increase in numbers was in wholesale and retail trade sector, which increased from 9,923 jobs in 1993 to 17,759 jobs in 2003. Table 5.4 below summarised the changes in Thurrock local employment number in each sector between 1993 and 2003.

Table 5.4 Employment by Industry Sector

Industry	1993	2003	Change (Absolute)	1993-2003 % change
Agriculture, hunting and forestry	44	69	25	56.8
Mining and quarrying	119	49	-70	-59
Manufacturing	7,456	6,760	-696	-9.3
Electricity, gas and water supply	700	115	-585	-84
Construction	1,211	3,353	2,142	177
Wholesale and retail trade	9,923	17,759	7,836	79
Hotels and restaurants	2,237	3,791	1,554	69
Transport and communication	7,842	7,553	-289	-4
Financial intermediation	632	635	3	0.5
Business services	3,780	4,378	598	16
Public administration	1,460	1,477	17	1.2
Education	2,351	4,227	1,876	80
Health and social work	4,064	4,270	206	5
Community and other services	1,810	2,240	430	24
Total	43,629	56,676	13,047	30

Source: ONS, Annual Business Inquiry

Businesses and Sectors

Between 1993 and 2003 the number of workplaces in Thurrock has almost doubled from 2,410 to 4,330. The largest percentage increase was seen in the construction sector, corresponding with the increase in jobs, the number of construction industry workplaces increased from 141 units to 595 units (422%). The wholesale and retail trade sector also saw an increase in the number of workplaces from 733 to 1,136 units. Table 5.5 below summarises the number of units per industry sector employing people in Thurrock.

Table 5.5 Workplace units by industry sector

Industry	1993	2003	Change (Absolute)	1993-2003 % change
Agriculture, hunting and forestry	10	7	-3	-30
Mining and quarrying	11	10	-1	-9
Manufacturing	223	307	84	38
Electricity, gas and water supply	6	7	1	17
Construction	141	595	454	321
Wholesale and retail trade	733	1,136	403	55
Hotels and restaurants	204	238	34	17
Transport and communication	293	528	235	80
Financial intermediation	59	53	-6	-10
Business services	297	839	542	182
Public administration	42	41	-1	-2.4
Education	76	91	15	20
Health and social work	114	176	62	54
Community and other services	201	302	101	50
Total	2,410	4,330	1,920	80

Source: ONS, Annual Business Inquiry

Business Size

The importance of small businesses to Thurrock has been steadily increasing. In 2003 there were 3,416 companies with between one and ten employees, which is equal to 78.9% of all companies in Thurrock. Table 5.6 below highlights the importance of small business in Thurrock.

Table 5.6 Business units by size band

Employment Band	1993		1998		2003	
	level	% of total	level	% of total	level	% of total
1 to 10	1,723	71.5%	3,126	79.1%	3,416	78.9%
11 to 49	541	22.4%	640	16.2%	675	15.6%
50 to 199	114	4.7%	150	3.8%	202	4.7%
200 or more	32	1.3%	38	1.0%	37	0.9%
Total	2,410	100.0%	3,954	100.0%	4,330	100.0%

Table 5.7 below provides the industrial breakdown for Thurrock by employee sizeband. The wholesale and retail trade sector tends to cover all sizes of business with 32.4% of all businesses with over 200 employees and 32.9% of businesses with between 11 and 49 employees in this sector.

Table 5.7 Size band proportions by industry sector

Industry	<i>% of all businesses</i>			
	1 to 10	11 to 49	50 to 199	200 or more
Agriculture, hunting and forestry	0.2	0.0	0.5	0.0
Mining and quarrying	0.2	0.3	0.0	0.0
Manufacturing	6.8	7.1	8.4	24.3
Electricity, gas and water supply	0.2	0.0	0.5	0.0
Construction	16.0	5.8	4.0	2.7
Wholesale and retail trade	24.9	32.9	24.8	32.4
Hotels and restaurants	4.4	10.2	7.9	5.4
Transport and communication	12.2	12.0	12.4	13.5
Finance	0.9	3.0	1.0	0.0
Business services	22.3	9.5	6.4	2.7
Public administration	0.4	3.4	2.5	2.7
Education	0.8	3.0	19.3	8.1
Health and social work	3.0	8.0	7.9	8.1
Community and other services	7.6	4.9	4.5	0.0
Total	100.0	100.0	100.0	100.0

Source: ONS, Annual Business Inquiry

6 CONSULTATION ON BUSINESS NEEDS

6.1 Introduction

In 2004 Bone Wells were commissioned by Thurrock Council to conduct a consultation exercise with Thurrock based businesses. Of the sample business contacted¹², a total of 149 respondents provided feedback. In summary, this feedback covered the following:

- Their main activities;
- Recent relocation activity;
- Existing premise type and future requirements;
- Existing floor space and site area;
- The quality and location of premises; and
- Expansion and relocation plans.

The survey questionnaire can be viewed as Appendix 4.

6.2 Profile of Business Respondents

In summary the survey found the following:

- With regards to their main activity at their current Thurrock address:
 - 22% of respondents had their headquarters there;
 - 22% manufacturing or processing;
 - 21% movement, storage and distribution; and
 - 17% sales, marketing and purchasing;
- With regards to type of location at their current address:
 - 43% of respondents said they were located in an industrial estate;
 - 13% a high street/shopping frontage; and
 - 9% at a business park.
- In terms of organisation size:
 - 2% of companies that responded had more than 500 employees;
 - 11% had between 100 and 499 employees;
 - 35% between 11 and 99 employees; and

¹² It was not indicated as to whether the sample of businesses contacted is representative of the baseline in Thurrock, in terms of activity, size and location. In terms of future policy formation, it will be necessary for the Council to conduct a more comprehensive business needs survey which is aimed at a representative sample of businesses. The data summarised from Bone Wells' work should be treated with caution in this regard.

- 52% between 1 and 10 employees.

6.3 Key Consultation Findings

In summary the consultation found that:

- 15% of business respondents said their companies had relocated in the last 3 years;
- Of those who specified their previous address, 62% of business respondents were previously located within Thurrock. Most of the previously Thurrock based respondents specified that they had relocated because of a need for larger premises, to allow for expansion;
- 47% of business respondents were located at premises that had one storey; 44% at premises that had two storeys; and 9% at premises that had three or more storeys.
- 78% of business respondents said their premises were 10 years old or more; 11% said their premises were 5-10 years old; and 11% said their premises were under 5 years old;
- 84% of business respondents said that at present their existing floor space was about right for the number of employees;
- 60% of business respondents identified their current premises as very good or good, in relation to their needs; and 59% identified their location as very good or good for their specific needs;
- 54% of business respondents said it is unlikely they would expand their floor space in the next 1-3 years, whereas only 18% said it was possible or probable that they would;
- 41% of business respondents said it is unlikely they would move to another location in the next 1-3 years, while 24% said it was possible or probable that they would;
- Of those who identified that they would be likely to move premises in the next 1-3 years, 83% said that they would remain in Thurrock while 11% said that they would move to other parts of East Essex (Basildon, Benfleet, Southend, Rayleigh).
- In terms of findings obstacles to employment expansion, 32% of business respondents said that specific skills availability was a problem and 30% said that general labour availability was a problem.