



Nathaniel Lichfield
& Partners
Planning. Design. Economics.



Breckland Council Breckland Employment Growth Study

Final Report

November 2013



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Executive Summary

This Employment Growth Study has been prepared by Nathaniel Lichfield & Partners (NLP) on behalf of Breckland Council. It is intended to form part of the evidence base for the emerging Local Plan which will cover the period to 2031.

The study provides an up to date understanding of the potential employment growth in Breckland District to help inform employment targets in the new Local Plan, as well as an updated assessment and review of existing employment land and premises. It also considers the current and future balance of demand and supply for employment land in the District, and potential policy approaches in relation to employment space for the emerging Local Plan.

The key findings of the study are as follows:

- 1 Breckland has a relatively successful economy recording significant job growth over the last two decades. The business base is dominated by small and medium-sized businesses but with below average levels of business start-ups and self-employment. Workforce productivity is relatively low which may in part reflect a slight mismatch in the local economy between lower skilled jobs available, and a more highly qualified resident workforce, many of which commute out of the District to higher paid employment elsewhere.
- 2 Employment space in the District is dominated by industrial uses and tends to be concentrated around Breckland's larger towns. The rural economy also accommodates important hubs of economic activity, particularly with regards to small scale office and workshop space. The District has seen moderate levels of new development over the past eight years, the majority for B1c/B2 manufacturing uses and B8 warehousing.
- 3 Demand for employment space remains steady, focused upon small scale industrial accommodation. The majority of commercial property market activity is concentrated within the settlements of Thetford and Dereham and, to a lesser extent, Attleborough, with very limited activity occurring outside of these key areas. Some of the District's stock is dated and/or poorly specified with evidence that this issue has been constraining industrial activity – specifically the attraction of new industrial occupiers – in the past.
- 4 Four different scenarios of future employment space requirements have been considered for the period up to 2031, based on a number of approaches which reflect economic growth, past development trends and potential labour supply factors. The majority of these scenarios point to a lower level of future economic growth in Breckland than the District has achieved in the recent past, partly reflecting a more pessimistic post-recession economic outlook. The overall space requirements related to these scenarios range from 134,235 sq.m to 310,180 sq.m of all types of employment space, implying in broad terms a need for between 31.6 ha and 74.7 ha of employment land. The majority of this spatial requirement relates to industrial (B1c/B2/B8) uses.

- 5 When compared with available employment space identified by Council monitoring data, Breckland has sufficient employment floorspace in quantitative terms to meet future needs up to 2031 under all scenarios of future growth. Although the District's stock of industrial and office space suffers from a range of qualitative factors such as ageing accommodation with limited market appeal, local market feedback indicates that the level of demand may not be sufficient to justify any significant additional allocations of land for employment use. Within this context, a number of policy issues emerge for consideration:
- a Consider rationalising the District's existing and future supply of industrial space by seeking to concentrate this space in the District's key locations and areas of strongest market demand (such as Thetford and Attleborough). This will help support critical mass of development on fewer sites, providing a clearer signal to potential investors and also supporting any necessary upfront infrastructure works. Future development of employment space in the District should also build upon and take advantage of significant infrastructure improvements associated with the dualling of the A11 from Fiveways to Thetford as well as the proposed Thetford SUE will also provide a key driver of economic growth within the District over the Plan period.
 - b In the more peripheral areas of the District where demand levels are weaker, it may be necessary to adopt a flexible approach to bringing forward employment sites by allowing the development of other higher value non-B uses on part of allocated sites, in order to unlock the site's potential and fund any associated infrastructure works.
 - c At the same time, the Council could consider releasing some of the District's poorer quality and poorer performing sites in more peripheral locations characterised by relatively low market demand and that suffer from constraints to (re)development (such as proximity to residential uses). This would help to ensure the appropriate distribution of employment space across the District in accordance with market demand.
 - d Over the longer term (i.e. 20 year plan period), it is recommended that any new provision of office space follows an enterprise centre type model, with small units for SMEs and local start-ups and shared workspace and networking opportunities. It is also recommended that any new office space is focused upon Breckland's town centres, benefitting from a more attractive working environment and range of facilities for staff.
- 6 Given the rural nature of much of the District, it is also important that the Local Plan continues to recognise the important role of rural settlements in providing employment space and opportunities for local residents. This is unlikely to justify specific land allocations, however the provision of a positive policy framework (e.g. reuse of buildings) that encourages rural

enterprise and diversification schemes represents the most appropriate way of ensuring that rural needs can be met.

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- Appendix 8 EEFM Baseline Forecasts

1.0 Introduction

- 1.1 Breckland Council (BC) commissioned Nathaniel Lichfield & Partners (NLP) to prepare an Employment Growth Study to form part of the evidence base for the emerging Local Plan which will cover the period to 2031.
- 1.2 This study provides an up to date understanding of the potential employment growth in Breckland District to help inform employment targets in the new Local Plan, as well as an updated assessment and review of existing employment land and premises.
- 1.3 The study takes account of relevant guidance from the South East England Planning Partnership Board (SEEPB)¹ and ODPM² (now CLG), and has regard to the National Planning Policy Framework (NPPF) and draft National Planning Practice Guidance. The main elements of the study involve three stages:
- **Stage 1: Taking Stock of the Existing Situation:** analysis of the economic strengths and weaknesses of the local economy, functional economic area, and an assessment of the fitness for purpose of a portfolio of designated employment sites;
 - **Stage 2: Assessing Future Requirements:** testing the implications of different population/household growth scenarios on future employment space requirements for the District, including latest economic forecasts and housing targets;
 - **Stage 3: Identifying a Site Portfolio:** analysing the suitability and deliverability of sites available to meet future needs under each growth scenario, which sites should be retained for employment uses and which released for alternative uses, and any need for additional sites.

Scope of Study

- 1.4 The purpose of the Employment Growth Study is to provide an evidence base report on the future growth potential of the District's economy to inform preparation of the new Local Plan. This is based on considering a range of scenarios for how the Breckland economy could change in the future.
- 1.5 Following from this analysis, the land and floorspace implications are specifically considered for the group of B-class sectors outlined below:
- **B1 Business** (offices, research & development, light industry);
 - **B2 General Industrial;** and
 - **B8 Storage or Distribution** (wholesale warehouses, distribution centres).
- 1.6 Demand for B-class employment land and floorspace is considered in this report, and references to “employment space” are intended to mean both

¹ SEEPB Economic and Employment Land Assessments Supplementary Guidance Consultation Document, 2009. Although the SEEPB no longer exists and the formal status of this guidance is unclear, it is considered to be a source of good practice.

² Employment Land Reviews: Guidance Note, ODPM, 2004

these elements. Industrial space in this report includes both manufacturing and distribution uses.

- 1.7 The study also considers future projections for growth in non B-class sectors to set out how the overall economy of the area could change in the future, although does not specifically assess the space implications of these other sectors because they are planned for using different methodologies and considered by other forms of technical evidence (e.g. retail assessment).
- 1.8 An important consideration for any work of this type is that it is inevitably a point-in-time assessment. This study has incorporated the latest data and other evidence available at the time of preparation. The accuracy and sources of data derived from third party sources has not been checked or verified by NLP.
- 1.9 As part of the study, consultation was undertaken with a range of stakeholders including commercial agents, economic development and business organisations. A list of consultees is included at Appendix 1. A business consultation workshop comprising a presentation of interim findings and structured group discussion was held in Dereham in October 2013. Notes of this event are contained in Appendix 2.

Structure of Report

- 1.10 The report is structured as follows:
- **Economic Context** (Section 2.0) – a review of current economic conditions and recent trends in the District and its economic strengths and weaknesses that may affect future needs for employment space;
 - **Overview of Employment Space** (Section 3.0) – analysis of the current stock and trends of employment space in the District in terms of mix of uses, development rates, gains and losses, age of premises, and provision in adjoining local authority areas;
 - **Breckland Commercial Property Market** (Section 4.0) – a review of the local commercial property market, including the supply of and demand for different types of employment space within the District and the needs of different market segments;
 - **Review of Current Employment Sites Portfolio** (Section 5.0) – assessment of the quality of current and potential employment land supply against defined criteria including its attractiveness to the market and its ability to meet future needs;
 - **Future Requirements for B Class Employment Space** (Section 6.0) – estimates future employment space requirements for B Class sectors in quantitative terms, drawing on employment forecasts and other factors;
 - **Demand/Supply Balance** (Section 7.0) – assesses the balance between current land supply and future needs, in both quantitative and qualitative terms, by comparing forecast requirements with availability of existing sites;

- **Overall Conclusions and Policy Implications** (Section 8.0) – considers policy and other measures needed to support the existing site portfolio and maximise economic growth in Breckland.

2.0 Economic Context

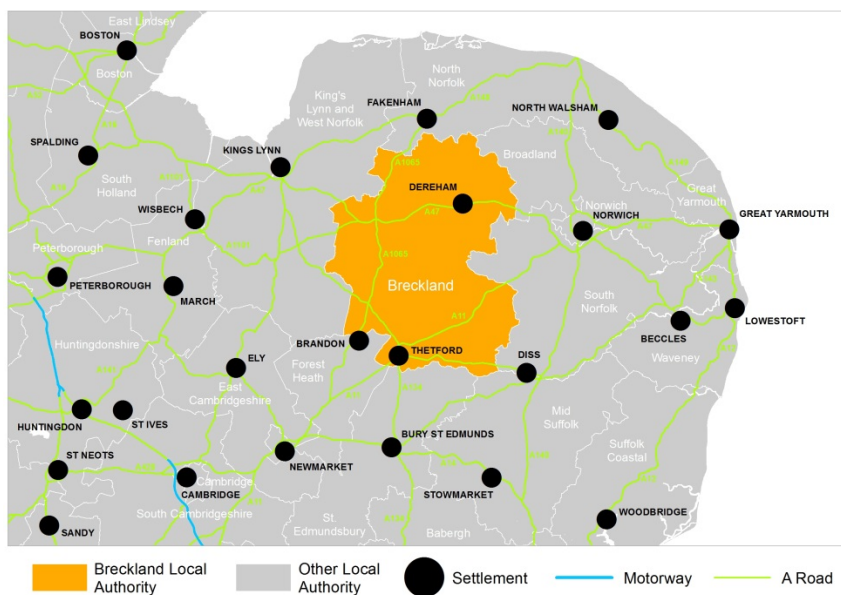
2.1 This section establishes the economic context for the study by reviewing recent economic conditions and trends within Breckland, relative to the East of England region and the national economy. This is important in identifying the existing strengths and weaknesses of the local economy, and the factors likely to influence the nature and level of future demand for employment space.

Overview

2.2 Breckland is one of the largest rural districts in England, covering over 1,305km² as well as being one of the most sparsely populated with much of the area dominated by the agriculture sector. The size and dispersed nature of the area's population presents significant challenges for delivering balanced economic growth.

2.3 Breckland's strategic position is emphasised by the good road communications offered by the A47 and A11, the latter of which is currently undergoing improvements between Fiveways Junction and Thetford due to be completed in 2014 and providing a completely dualled road linking Norfolk to the rest of the country for the first time. Breckland offers a diverse blend of environments and in addition to 108 rural parishes, there are five market towns: Attleborough, Dereham, Swaffham, Thetford and Watton which are an essential component of the economic and social structure, acting as service centres to their hinterlands. The area has seen a rapid population growth, increasing pay levels and low rates of unemployment and there is a trend for the overall number of jobs to increase. However, average wages remain relatively low in comparison with regional and national levels due to lower level of qualifications of people in the District and the low level of skills required by many of the available jobs

Figure 2.1 Context of Breckland



Economic Conditions and Trends

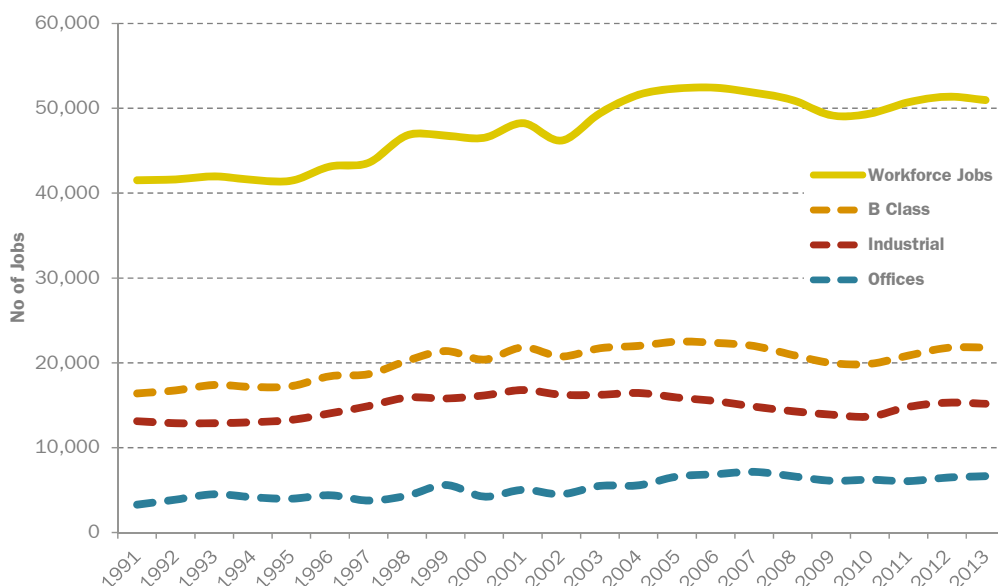
2.4 Current economic conditions and trends in Breckland are summarised below, with comparisons made, where appropriate, with regional and national averages. Data is drawn from the East of England Forecasting Model (EEFM) and published Office for National Statistics (ONS) sources via Nomis unless indicated otherwise.

Employment

2.5 The overall population of Breckland, currently 130,490³, grew by some 7.3% between 2001 and 2011, slightly below the regional (8.5%) average but similar to the rate of population growth recorded nationally over this period (7%). Breckland recorded 50,980 workforce jobs in 2013⁴, representing an increase of 22.8% from its 1991 level, significantly outpacing growth across both the East of England region (18.7%) and UK (13.9%) over this period. In terms of the recession, Breckland recorded a net loss of 2,470 workplace jobs during the period 2007-2010, but has since recorded some employment growth.

2.6 The proportion of B class jobs (i.e. offices, industrial and warehousing activities) in the District has remained relatively constant over the last 22 years, representing between 39% and 46% of all jobs in Breckland. B class jobs peaked at 22,495 in 2005, and have declined slightly since then. During this period, office jobs have gradually represented an increasing contribution of all B class jobs, although industrial employment has continued to represent the majority of B class jobs in the District (Figure 2.2).

Figure 2.2 Total Workforce and Component B Class Jobs in Breckland, 1991-2013



Source: EEFM 2013 / NLP analysis

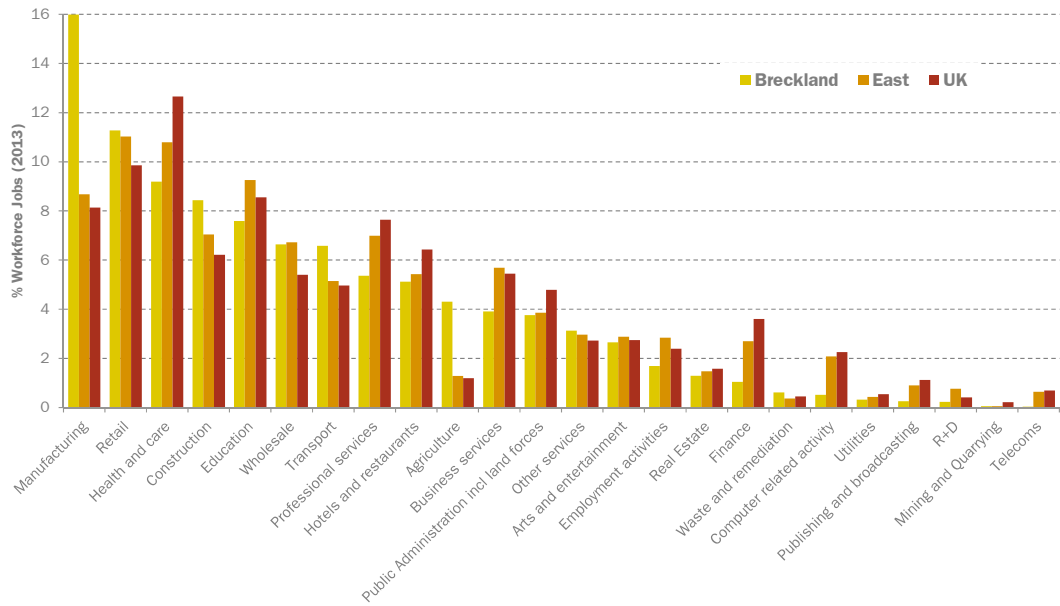
Note: B class, industrial and office jobs are presented as a sub-set of total workforce jobs

³ Census 2011 data

⁴ Experian 2013

2.7 In employment terms, the District’s largest sectors in 2013 were manufacturing (16%), retail (11.3%), healthcare (9.2%), construction (8.4%) and education (7.6%), with wholesale, transport and professional services also accounting for a significant share of employment (Figure 2.3). The financial, IT and business services sectors are under-represented compared with the regional and national averages.

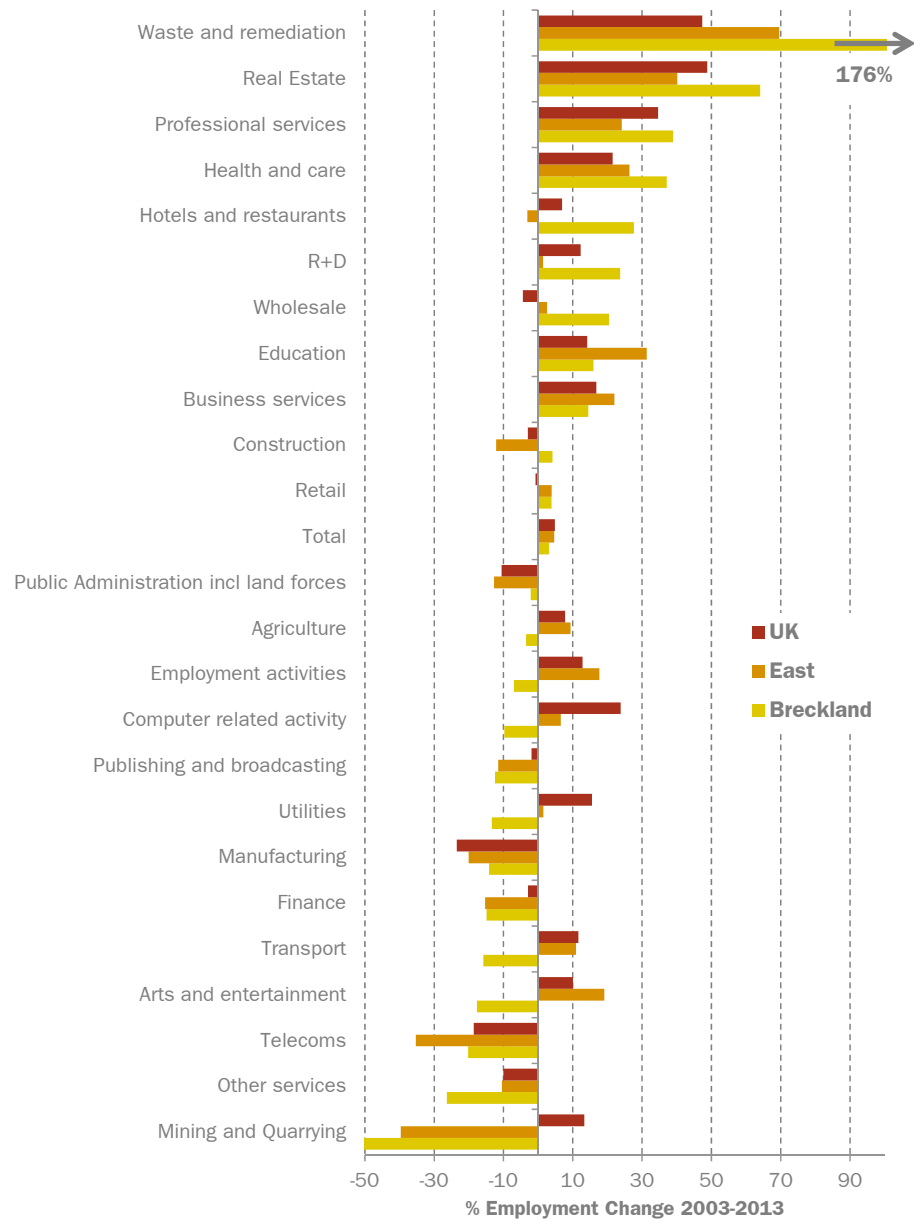
Figure 2.3 Main Economic Sectors in Breckland by Share of Employees, 2013



Source: EEFM 2013 / NLP analysis

2.8 Over the last decade (2003-2013), the largest contributors to job growth in the District have been waste (176% - albeit starting from a low base), real estate (64%), professional services (39%) and healthcare (37%), where Breckland outperformed regional and national growth rates. At the same time, the District saw significant job losses in telecommunications, recreation, transport, financial services and manufacturing sectors (Figure 2.4).

Figure 2.4 Employment Change in Breckland by Sector, 2003-2013



Source: EEFM 2013 / NLP analysis

Productivity

2.9

Productivity (measured by Gross Value Added (GVA) per worker) within Breckland’s labour force is relatively low compared with regional and national averages. Whilst average GVA generated by workers in Breckland (£32,940) is higher than adjoining North Norfolk, it falls well below comparator economic centres within the counties of Norfolk and Suffolk including Broadland (£44,150), South Norfolk (£39,590) and St Edmundsbury (£38,775) (Table 2.1).

Table 2.1 Average GVA per Worker

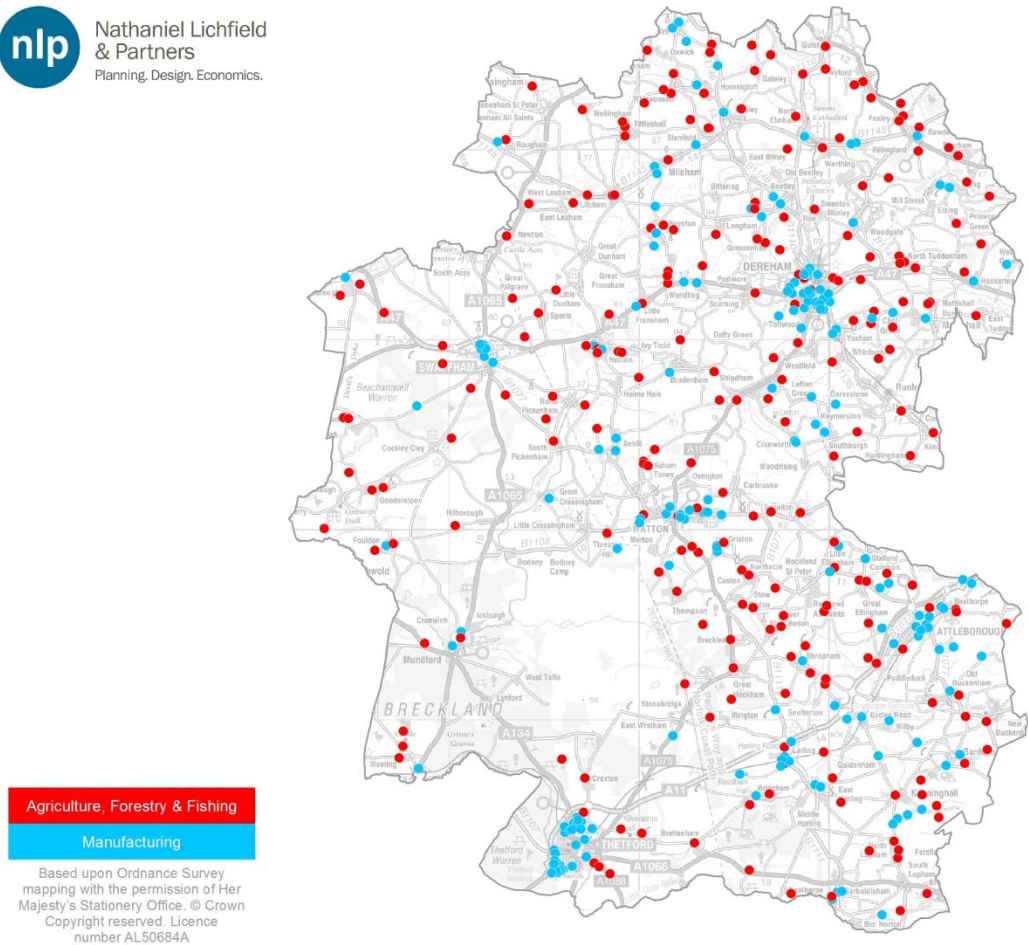
Location	GVA per Worker
Breckland	£32,940
King's Lynn and West Norfolk	£35,540
North Norfolk	£32,560
Broadland	£44,150
South Norfolk	£39,590
St Edmundsbury	£38,775
Forest Heath	£35,580
Norfolk	£36,175
East of England	£39,165
UK	£40,470

Source: EEFM/NLP analysis

Business Demography

- 2.10 Looking at the size of businesses in Breckland, the District has a very similar proportion of small firms with 1-9 employees (89.2%) than the regional (89.3%) and national (88.7%) averages, with relatively fewer large firms.
- 2.11 Between 2004 and 2010, the number of VAT registered firms in the District grew by less than 1%, a rate significantly below that of the East of England region (5.8%) and UK average (6.6%). With 46 new VAT registrations per 10,000 working-age population in 2010, Breckland's rate of new business formation is much lower than regional (61) and national (59) averages.
- 2.12 Breckland also has a lower than average rate of self-employment, with 9.4% of the working-age population falling within this category compared with 10.6% in the East of England and 9.5% nationally in 2012. These indicators suggest slightly lower levels of entrepreneurial activity in Breckland.
- 2.13 Drawing on Inter-Departmental Business Register (IDBR) data, Figures 2.5 to 2.8 below provide an overview of the spatial distribution of key business clusters within Breckland. A map of all sectors in the District is presented in Appendix 3, indicating the presence of a wide range of business sectors in Breckland but with a particular focus upon the agriculture/manufacturing, distribution, leisure and hospitality and business services sectors, considered in turn below.

Figure 2.5 Spatial Distribution of Agricultural and Manufacturing Sectors in Breckland

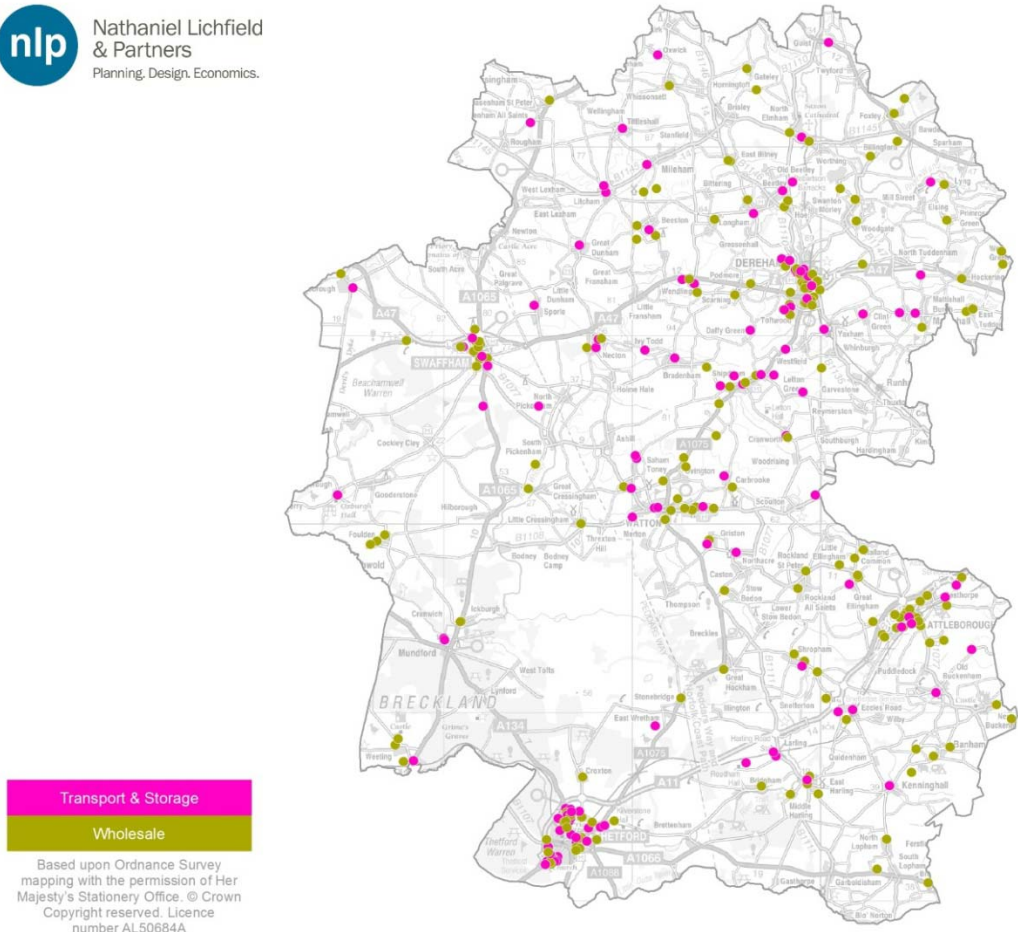


Source: IDBR/ONS/NLP analysis

2.14

Figure 2.5 summarises the broad distribution of agriculture and manufacturing related firms in Breckland. As might be expected, agricultural businesses are scattered across the rural area of the District while manufacturing activities (including food production and processing) tend to be clustered around the main centres of Thetford and Dereham but also in smaller centres (such as Attleborough and Swaffham) and rural areas to the north east and south east of the District.

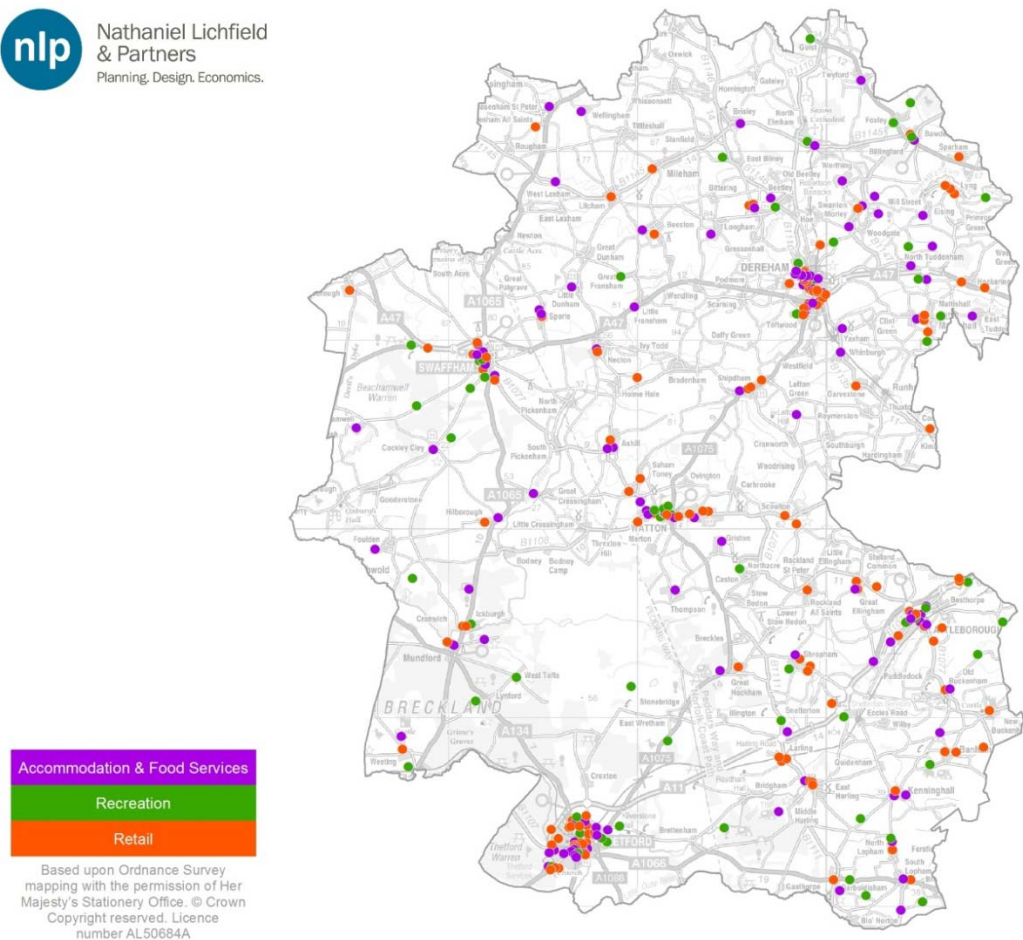
Figure 2.6 Spatial Distribution of Transport and Wholesale Sectors in Breckland



Source: IDBR / ONS / NLP analysis

2.15 Breckland’s economy is dominated by small scale distribution activities, with the majority of wholesale and transport related firms concentrated along the District’s key A11 and A47 transport corridors and clustered around the main towns of Thetford and Dereham, as well as Swaffham, Attleborough and Watton (Figure 2.6). Beyond these settlements, distribution activity is dispersed relatively unevenly across the remaining rural areas of the District.

Figure 2.7 Spatial Distribution of Retail, Leisure and Hospitality sectors in Breckland

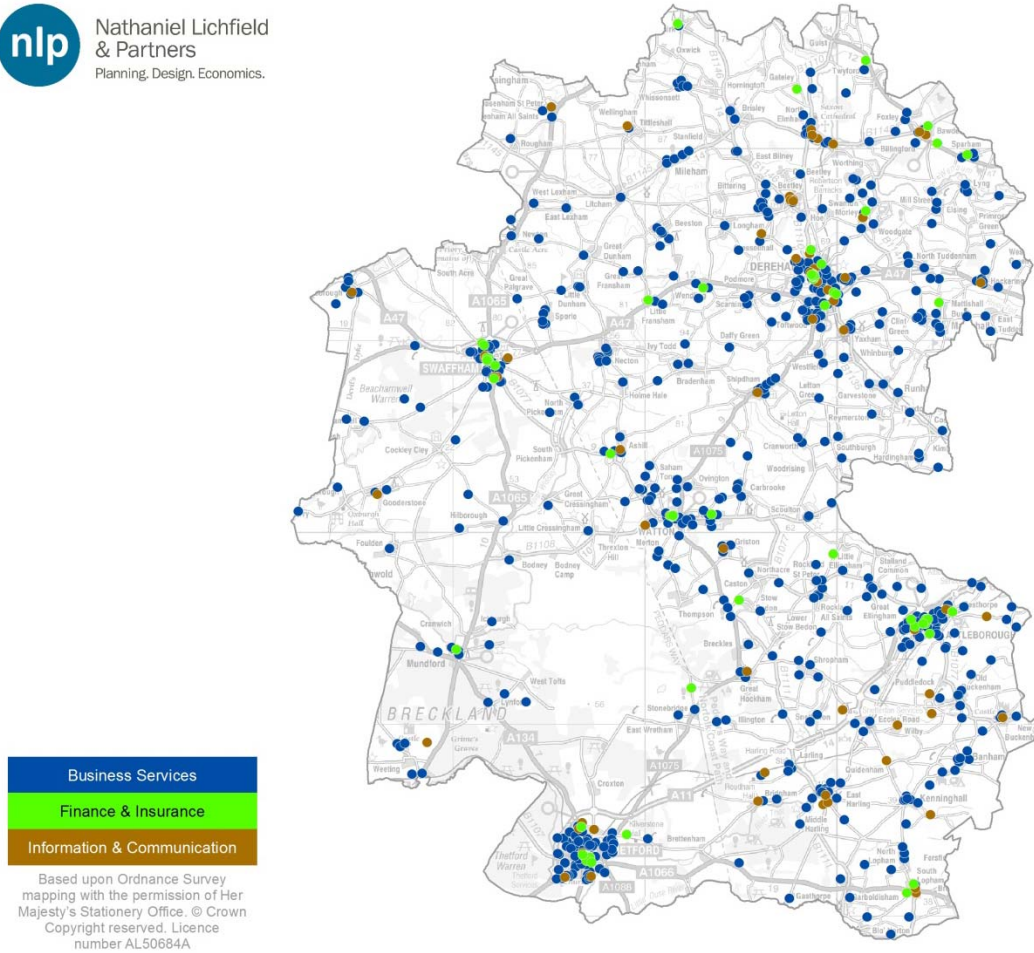


Source: IDBR / ONS / NLP analysis

2.16

Retail represents one of Breckland’s key sectors in employment terms, with the majority of retail firms based in and around the District’s larger settlements (Figure 2.7). By contrast, the hospitality and recreation sectors tend to be distributed more evenly across rural swathes of the District, in particular to the north east of Dereham and to the south east of the District.

Figure 2.8 Spatial Distribution of Business Services Sectors in Breckland



Source: IDBR / ONS / NLP analysis

2.17 Whilst employment within business services sectors in Breckland is relatively low in absolute terms, the sector is characterised by a large number of smaller firms (SMEs) scattered across the District and located within both urban areas such as Dereham and Thetford and more rural settlements East Harling, North Elmham and Gressenhall (Figure 2.8). This reflects the fact that much of the District’s office stock comprises converted residential properties.

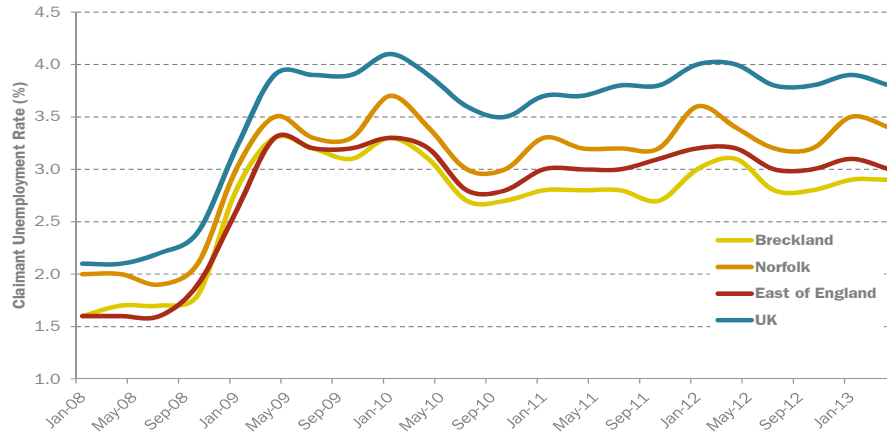
Labour Market

2.18 Breckland’s economic activity rate, the proportion of working age residents in or seeking employment, at 74.3% is lower than both the East of England (79.9%) and national (77.1%) figures. This indicates some scope to expand local labour supply from current residents.

2.19 The number of claimant unemployed has nearly doubled in Breckland since the start of the recession in early 2008 rising to 2.9% in April 2013. However, its current rate is below that across the wider county (3.4%), region (3%) and well below the national average (3.8%), a pattern that has generally prevailed

historically (Figure 2.9). On the wider Annual Population Survey measure⁵, the District's unemployment rate is higher at 7.4%, although this also remains below that of Great Britain (7.8%).

Figure 2.9 Claimant Unemployment Jan 2008 to Jan 2013

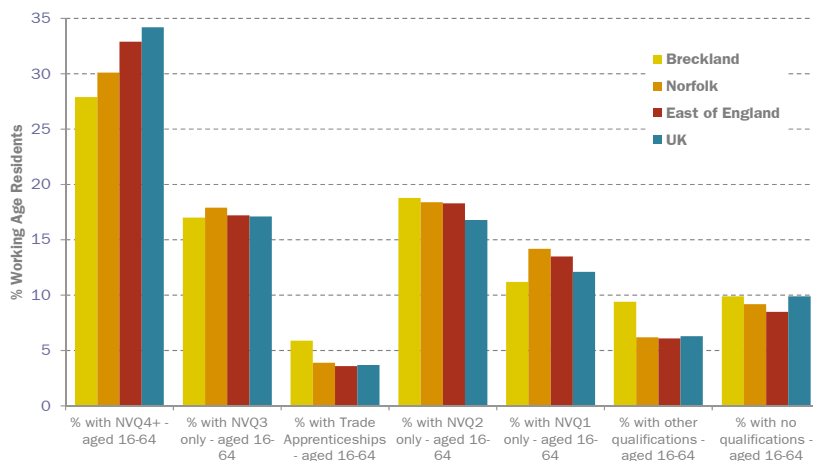


Source: Nomis 2013

2.20 In November 2012 there were just over three claimant unemployed workers for every unfilled job centre vacancy in the District. This was higher than the ratio for the East of England region (2.6) but slightly lower than the Great Britain average (3.4) indicating a fairly tight labour market locally compared with other parts of the region, with better prospects of local residents finding work.

2.21 The District's resident workforce has lower than average skill levels when compared to the county, East of England region and UK as a whole, with a lower proportion of graduate level workers (27.9% compared to 30.1%, 32.9% and 34.2% respectively) and a relatively high proportion with no qualifications.

Figure 2.10 Resident Skill Levels

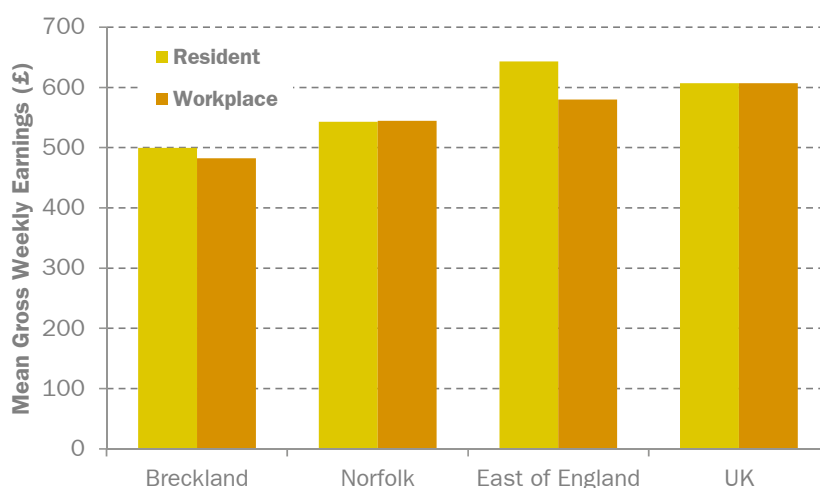


Source: Nomis 2013

⁵ This records all those searching for work but who are currently unemployed regardless of whether they are claiming job-seekers allowance or not

- 2.22 The occupation profile of its workforce is broadly in line with the national average but with slightly lower proportions of highly skilled occupations (SOC groups 1 to 3) and higher proportions of lower and unskilled manual workers (SOC groups 8 to 9).
- 2.23 Turning to the types of jobs required in the District, the most sought-after occupations amongst claimant unemployed workers are sales & customer service occupations (28%) and lower skilled, elementary occupations (28%). In general, the District's profile of job types sought by unemployed residents is similar to the region as a whole.
- 2.24 As Figure 2.11 illustrates, wages for those living in the District (resident) are slightly higher than for those people working in the District (workplace). Nevertheless, both resident and workplace wages fall below the county, regional and national average. This indicates that the types of jobs available locally are much less well paid than elsewhere in the county and region and that some residents are commuting to higher paid jobs outside of the District.

Figure 2.11 Mean Gross Weekly Earnings



Source: Annual Survey of Hours and Earnings 2012

- 2.25 Breckland is characterised by generally low levels of deprivation, and is ranked as the 174th most deprived local authority area out of 326 in England, which just places it within the 50% least deprived areas in the country.⁶ However, this District-wide profile masks significant variation within Breckland, with long term unemployment and worklessness remaining entrenched in pockets of deprivation across the District, such as the Abbey estate area of Thetford.

Knowledge-based industries

- 2.26 Knowledge-based industries are those sectors of the economy where value-added is derived from the intensity and accumulation of knowledge, often fostered through innovation and increasing use of technology. Firms within this sector tend to grow faster and have greater future potential than other sectors

⁶ As measured by the Index of Multiple Deprivation 2010

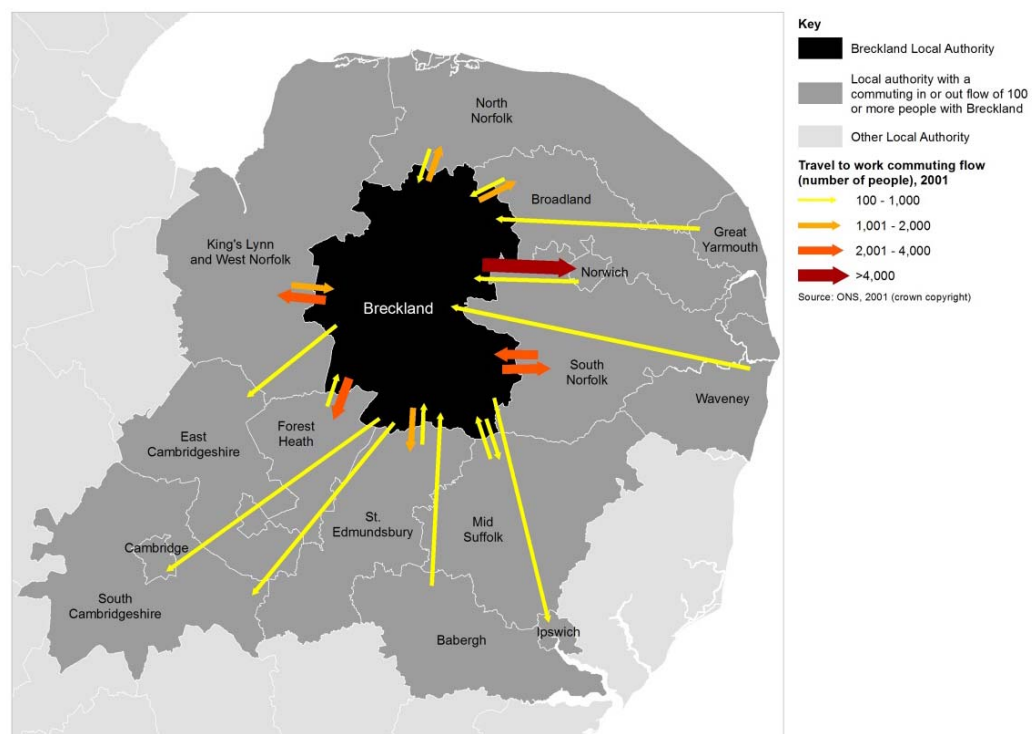
and so are considered an important indicator of an economy's competitiveness and future growth prospects.⁷

- 2.27 Some 15% of Breckland's businesses were classified as knowledge-based in 2010, significantly lower than the East of England (22%) and national (22%) rate and also below the neighbouring authorities of South Norfolk, St Edmundsbury and Broadland.⁸ This suggests the District is relatively poorly represented in the types of businesses that are more likely to generate future growth.

Functional Economic Area

- 2.28 Examining commuting flows can help in defining the functional economic market area of a particular local economy.⁹ In 2001, some 36% of Breckland's working residents worked outside the District indicating a reasonably high rate of out-commuting. In total, nearly 19,870 residents worked elsewhere, predominantly in the City of Norwich (23%) as well as the adjoining Districts of South Norfolk (13%), Forest Heath (13%) and King's Lynn and West Norfolk (11%) (Figure 2.12).

Figure 2.12 Breckland travel-to-work linkages, 2001



Source: Census 2001

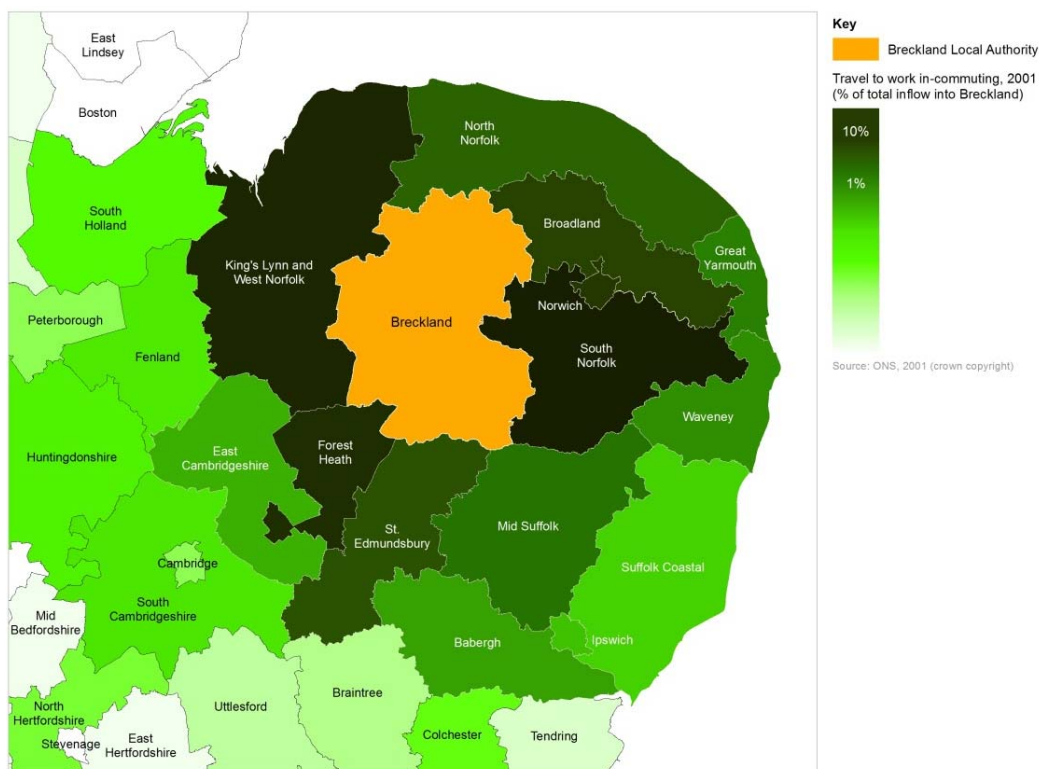
⁷ Based on definition adopted by the Organisation for Economic Co-operation and Development (OECD), includes high-technology manufacturing such as pharmaceuticals, computers and aerospace, and services such as telecommunications, financial intermediation, computing and research and development.

⁸ UK Competitiveness Index, 2010

⁹ Functional Economic Market Areas: An economic note, CLG 2010

- 2.29 At the same time, approximately 9,610 workers commuted into Breckland, predominantly from the adjoining districts of South Norfolk and King's Lynn and West Norfolk (Figure 2.13). On this basis, Breckland is a net exporter of labour, with a net outflow in the order of 10,260 residents, some 18% of its resident workforce.

Figure 2.13 In-Commuting to Breckland



Source: Census 2001

- 2.30 Breckland's central location within the wider Greater Anglia sub-region inevitably influences the nature of these economic and labour market flows. For example, the District's proximity to Norwich represents a significant draw for many of Breckland's higher skilled working residents with just under 4,600 residents commuting to the city for work in 2001 (accounting for approximately just under a quarter of all out-commuters from Breckland). As discussed in the following section, the city of Norwich as well as South Norfolk accommodate a number of relatively high profile, major employment sites such as the Norwich Research Park¹⁰, as well as a sizeable emerging pipeline of new strategic development sites to capture economic growth in the future (such as a 30 ha new business park adjacent to Norwich airport).
- 2.31 Nevertheless, Breckland continues to provide an important economic role within the sub-region, drawing in workers from adjoining authority areas, and characterised by a commercial property market that serves a steady level of local demand from predominately industrial businesses. Section 4.0 provides further analysis of the functional economic area within which Breckland lies with

¹⁰ Identified by the New Anglia LEP emerging Plan for Growth as a key location for jobs growth in Norfolk and Suffolk

a particular focus upon the geography of the sub-regional commercial property market.

Homeworking

- 2.32 A relevant metric to potential demand for start-up/small business space is the proportion of the working-age population who identify their home as their primary place of work. Home-based businesses often seek more formalised employment space or access to business support facilities as they grow and expand. Table 2.2 compares 2001 and 2011 Census travel-to-work statistics showing the proportion of working-age population categorised as ‘working mainly or at home’.

Table 2.2 Proportion of Working-age Population working mainly at or from home

	2001	2011
Breckland	11.5%	8.2%
East of England	9.4%	7.4%
England	9.2%	6.9%

Source: 2001/2011 Census travel-to-work statistics

- 2.33 The data indicates that home-working rates in Breckland are higher than both the regional and national average, although this has decreased over the last decade (in line with regional and national trends). This reflects that, typically, rural areas such as Breckland have more remote workers and home-based businesses than urban centres.
- 2.34 A recent report by Enterprise Nation¹¹ suggests that there are around 2.8 million businesses operating full time from home, representing approximately 60% of the SME business base. These home based businesses contribute over £280 billion to the UK economy each year, and have increased in scale by around 300,000 businesses over the past 12 months alone (with the recession proving to be a key factor for many start-ups).

Conclusions

- 2.35 The District has recorded significant job growth over the last 22 years (22.8%), outperforming both regional and national trends. The proportion of B class jobs has remained largely constant over this period, with declining industrial employment offset by office job growth.
- 2.36 Breckland’s key sectors of healthcare and professional services have experienced significant employment growth over the last 10 years. At the same time, significant job losses were recorded in telecommunications, recreation and manufacturing (although manufacturing still remains a key sector of employment in the District).
- 2.37 The District’s business base is dominated by SME’s with relatively low levels of business start-up and self-employment. Breckland’s economy is also

¹¹ Enterprise Nation, Home Business Report 2009

characterised by below average productivity/GVA which may in part reflect a slight mismatch in the local economy between lower skilled jobs available, and a more highly qualified resident workforce, many of which commute out of the District to higher paid employment elsewhere.

2.38 Breckland's businesses are distributed across the District but tend to be concentrated in and around the key settlements of Thetford, Dereham, Swaffham, Attleborough and Watton. Rural areas of the District also accommodate a significant proportion of Breckland's agricultural, manufacturing and business services activity.

2.39 Breckland's residents have below average skills, while the District's labour market continues to face a number of challenges to maintain high economic activity and low unemployment. Significant levels of out-commuting results in a slight contrast between workplace and resident earnings, while deprivation remains entrenched in pockets of the District such as the Abbey estate area of Thetford.

3.0 Overview of Employment Space

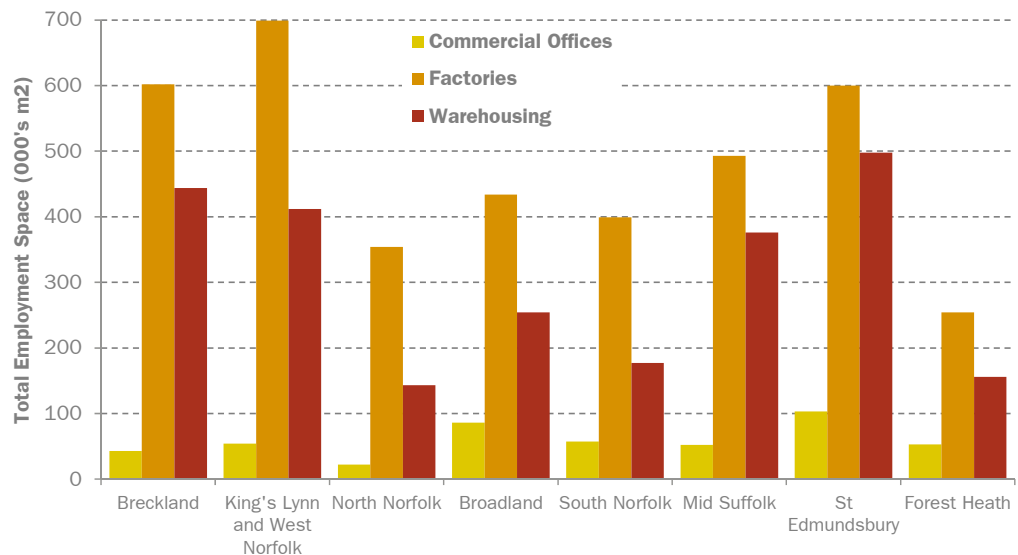
3.1 This section provides an overview of the current stock of employment space in Breckland and adjoining districts, and recent trends and changes to the supply of this space. Both the amount of employment land and the quantity of built employment floorspace are considered across the main types of employment uses i.e. offices (use class B1(a/b)), warehousing/distribution (B8) and manufacturing industry (B1(c)/B2). This analysis is based on data from the following sources:

- commercial floorspace data from the ONS and Valuation Office Agency (VOA);
- Breckland Council's monitoring data on commercial space; and
- EGi Property Link database and other commercial property sources.

Current Stock of Employment Space

3.2 In 2008, Breckland contained some 1,089,000 sq.m of B class floorspace. A breakdown of this space by main uses, and a comparison with employment space levels in nearby districts, is shown in Figure 3.1. This indicates that the supply of employment space in Breckland is dominated by industrial uses (manufacturing and distribution/warehousing) which account for 55% and 41% of total stock respectively. The stock of both factory and warehousing space is the second largest of all seven adjoining Districts.

Figure 3.1 Employment floorspace by District ('000s sq.m)



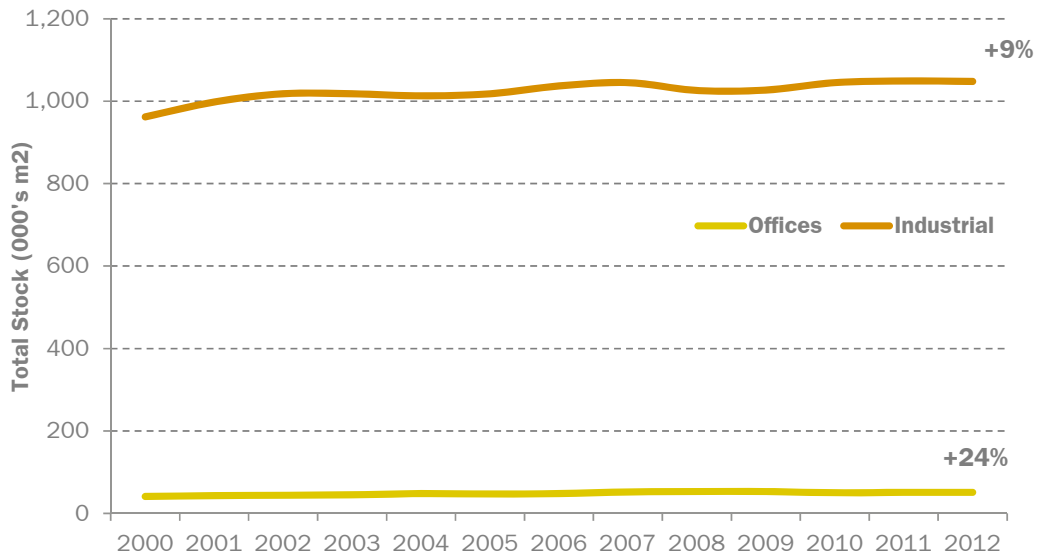
Source: VOA 2008 / NLP analysis

3.3 By contrast, the District's commercial office stock amounts to just 4% of total employment space, and represents the second lowest of all adjoining districts, with only North Norfolk recording less office space. Figure 3.1 shows that the

strong concentration of industrial space in Breckland is echoed across all of the District’s neighbouring authorities, with a relatively low overall stock of office space across this part of East Anglia.

- 3.4 Total industrial space in Breckland grew by nearly 9% over the 12 year period 2000-2012 according to published VOA data (Figure 3.2). Commercial office space increased at a much faster rate (24%) over the same period, although starting from a lower base point.

Figure 3.2 Change in Business Floorspace in Breckland, 2000-2012



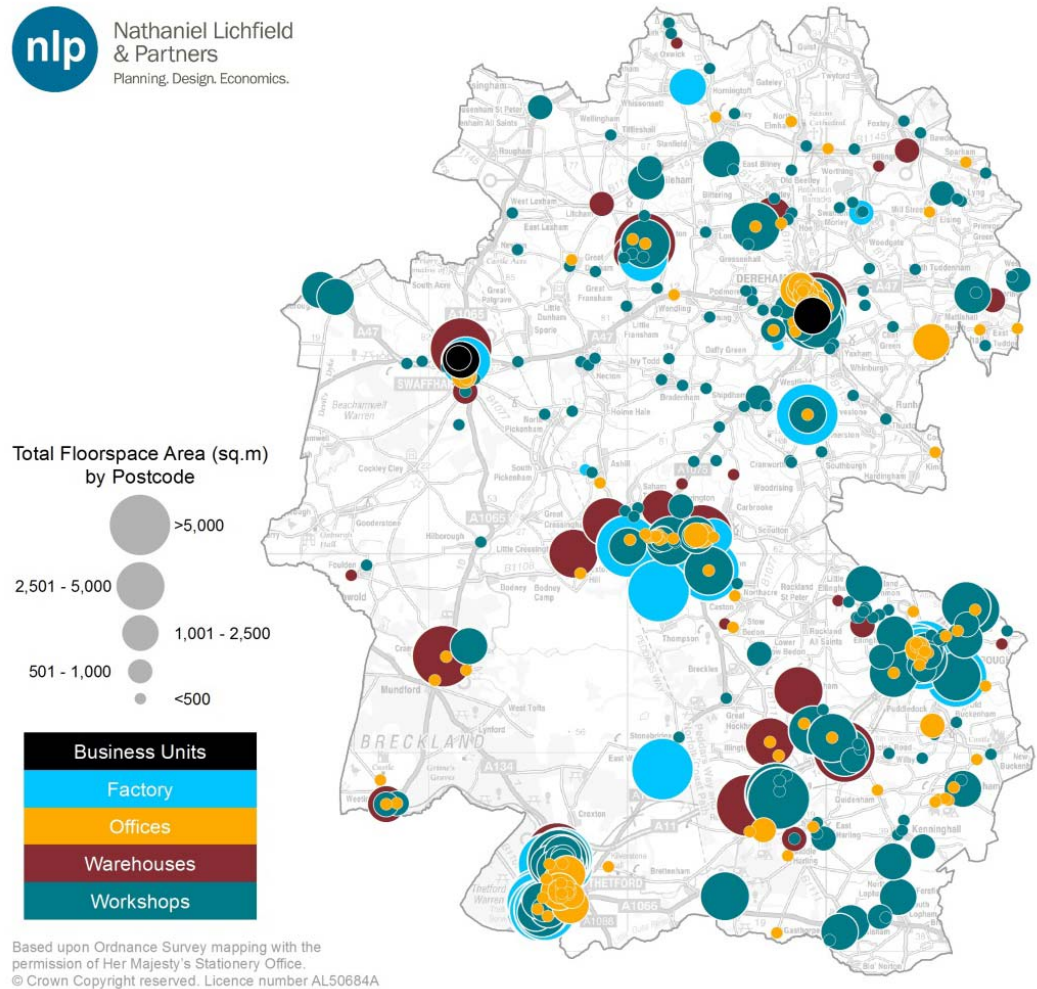
Source: VOA Business Floorspace Statistics / NLP analysis

Spatial Distribution

- 3.5 Figure 3.3 and Table 3.1 show the distribution of B class employment space across Breckland using latest available VOA data. This indicates that the town of Thetford accommodates a large proportion of the District’s industrial and commercial office space, with significant clusters of space located in and around the town. Dereham also represents a key location for office stock, while the remaining industrial (factory, warehousing and workshop) space is clustered around the settlements of Watton, Attleborough and Snetterton.

- 3.6 Figure 3.3 also shows that although employment space tends to be concentrated around Breckland’s urban areas, the rural economy also accommodate important hubs of economic activity, particularly with regards to small scale office and workshop space.

Figure 3.3 Spatial Distribution of Employment Floorspace in Breckland



Source: VOA 2010 / NLP analysis

Table 3.1 Location of Employment Floorspace in Breckland

Location	Proportion of Office Space (Offices and Business Units)	Proportion of Industrial Space (Factory, Workshop and Warehouse)
Attleborough	6.1	7.6
Dereham	28.4	7.9
Snetterton	0.2	8.3
Swaffham	15.6	2.0
Thetford	26.9	36.1
Watton	8.6	6.3
Other	14.2	31.8
Breckland Total	100	100

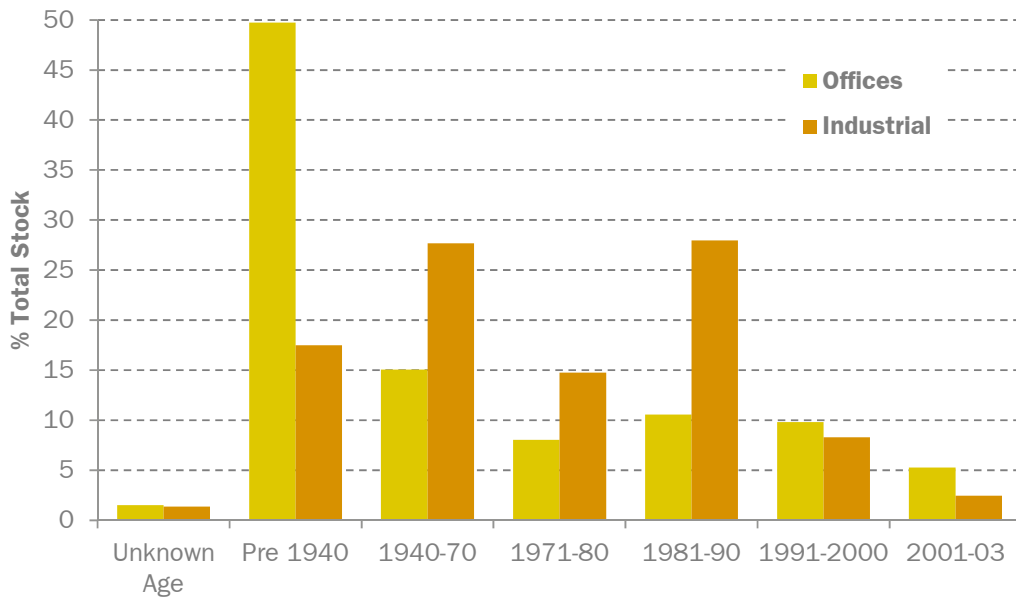
Source: VOA 2010 / NLP analysis

Age of Premises

3.7

Although only covering the period up to 2003, ONS data on the age of premises can give a broad indication of the age of stock in the District. This shows that Breckland’s sizeable stock of industrial space is relatively old, with 61% built before 1980, although this proportion is lower than the East of England regional average (68%) and national average (72%). The District has recorded a reasonable level of industrial completions since 2003, adding 79,000 sq.m of new industrial accommodation to the overall stock, equivalent to an increase of around 8%.

Figure 3.4 Age of Premises in Breckland



Source: ONS 2003

3.8

With regard to offices, 74% of Breckland’s stock was built before 1980, similar to regional and national proportions. A reasonable amount of new office development since 2003 (16,900 sq.m) suggests this position is likely to have improved slightly. Overall, this indicates a fairly ageing stock of office space in the District and lack of modern business premises relative to what is recorded in other parts of the region.

Vacancy

3.9

A review of commercial property being marketed in Breckland at November 2013 indicates that approximately 3,700 sq.m of office floorspace is currently available across the District, the majority of which is available within Thetford town centre and out of town business parks. This indicates a vacancy level for office stock of just over 7%. In regards to the availability of industrial space, the equivalent figure was approximately 81,200 sq.m, or 5.5% of the total stock. This availability was spread across a variety of sites throughout the District, although notable concentrations were evident in the main industrial areas of

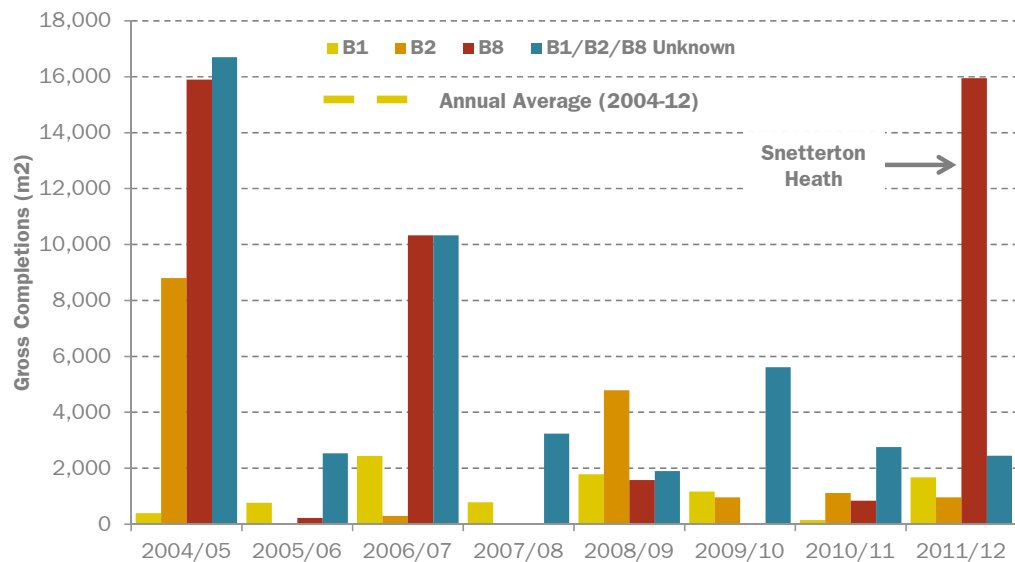
Caxton Way (Thetford), Mundford Road Trading Estate (Thetford) and Wymondham Business Centre (Attleborough).

- 3.10 These vacancy rates appear to be much lower than typical availability levels of around 10% for standard commercial property markets that allow for a certain amount of available space for firms to relocate and expand. This suggests a relatively tight supply of employment land relative to demand in Breckland, particularly when considering the provision of industrial space.

Development Rates

- 3.11 The gross amount of floorspace developed for employment uses in Breckland over the last eight years is shown in Figure 3.5 below.

Figure 3.5 Gross Development Rates in Breckland 2004-12



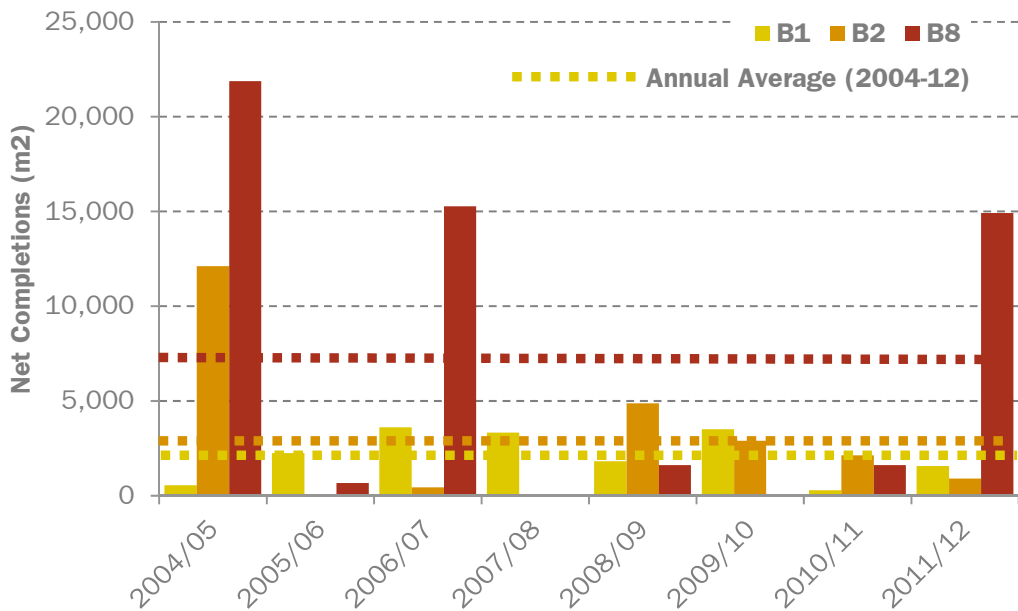
Source: Breckland District Council/NLP analysis

- 3.12 This indicates that just under 14,560 sq.m of gross B Class space was developed per annum across the District between 2004 and 2012. Just over a third (39%) of new floorspace was developed for mixed/flexible B class uses, 38% for specifically B8 distribution uses, 15% for B2 factory/industrial uses and just 8% developed for B1a/b office uses.
- 3.13 Figure 3.5 shows that the level of new development in Breckland has been very uneven over recent years, particularly in terms of industrial development. Very low levels of office development have been recorded across the monitoring period, reflecting the weaknesses of the District as an office market location.
- 3.14 The level of development peaked in the first reporting year (2004/05) with the District recording total gross completions (41,800 sq.m) that were nearly three times as high as the annual average over the last eight years. The majority of all gross completions in 2011/12 related to the development of engineering/light industrial units at Snetterton Heath South and therefore completions elsewhere in the District were relatively modest by comparison.

3.15 Although net completions of B class space are not consistently monitored and reported by the Council, it is possible to estimate a proxy net take-up rate for the past few years in Breckland by analysing losses of B class space across a sample of General Employment Area sites and non General Employment Area sites in the District. This indicates that a net completion rate of approximately 83% between 2007 and 2013 across the District. This has been applied to the gross development rates outlined above to estimate past levels of net development. ‘Unknown B1/B2/B8’ completions have been apportioned to individual B use class categories using the relevant split for that year.

3.16 This suggests that net completions of B class space in Breckland have averaged approximately 12,030 sq.m per year, the majority of which (58%) relate to B8 distribution uses. The remaining 24% and 18% relate to B2 factory/industrial uses and B1a/b office uses respectively (Figure 3.6).

Figure 3.6 Net Development Rates in Breckland 2004-12



Source: Breckland District Council/NLP analysis

Emerging Supply

3.17 The supply of employment space in the development pipeline comes from sites currently allocated for employment development and from other planning permissions that are either yet to be implemented or are currently under construction. Based on Council monitoring data at March 2012, the District’s employment land supply totals 116.38ha, broken down as follows in Table 3.2.

Table 3.2 Available Employment Space in Breckland

	ha/ sq.m	B1	B2	B8	B1/B2/B8 Split Unknown	Total
Extant Allocations	ha	0	0	0	87.6	87.6ha
Extant Planning Permissions	ha	8.81	9.14	8.89	1.94	28.78ha
	sq.m	2,860	11,160	2,322	6,036	22,378sq.m
Total	ha	8.81	9.14	8.89	89.54	116.38ha

Source: Breckland Council Annual Monitoring Report 2012

- 3.18 The majority of this land is concentrated within Breckland's General Employment Areas (GEAs) and specifically within the town of Thetford (including the 22ha Thetford Urban Extension allocation, 18ha at Thetford Enterprise Park and 8.9ha saved employment allocation). Other sites are generally smaller in scale and dispersed across the District.
- 3.19 It should be noted that whilst the District currently has around 22,380 sq.m of outstanding planning permissions for B class development, there is no guarantee that these permissions will be implemented over the plan period, whereby bringing forward land for employment use. Furthermore, these permissions relate to specific schemes and users and may therefore be less able to meet general future needs.

Employment Space in Adjoining Areas

- 3.20 The extent of available employment land in adjoining local authority areas and any major new economic developments coming forward that might compete with Breckland for future demand is important to understand. This section provides a brief assessment of the current condition of employment space for each area. The amount of B class employment floorspace in each adjoining district to Breckland is shown in Figure 3.1.

Forest Heath

- 3.21 Industrial employment space dominates office employment space in the Forest Heath district. Although some office premises are located in Newmarket, these tend to be occupied by local businesses that service the local area, or small firms that have moved from Cambridge in search of lower rent levels. Outside of Newmarket there is no significant commercial office market. In regards to the industrial market, a large amount of employment land is provided in industrial estates located on the fringes of Newmarket and Mildenhall.
- 3.22 The Core Strategy (2010) for Forest Heath recommends support for developing and sustaining the key sectors of the district, which include the equine industry around Newmarket, the air bases around Mildenhall and Lakenheath, tourism, forestry, and agriculture. The main locations for employment growth have been allocated for Newmarket with 5 ha, Mildenhall with 4.5 ha and Brandon with 2

ha over the plan period 2001 to 2026. In total, 16 ha of additional employment land are planned over this period for all types of employment use.

King's Lynn & West Norfolk

- 3.23 Employment space in King's Lynn & West Norfolk is largely characterised by a high proportion of industrial stock and little provision for office space. Where office development has occurred, it has generally been in town centre locations within converted residential buildings. Almost no significant office floorspace is provided outside of King's Lynn. Industrial space is typically located in sizeable estates like the Hardwick Estate, Hunstanton Commercial Park and North Lynn Estate. However much of these industrial estates are not particularly modern with many of them having been built in the post-war era up to the 1980s.
- 3.24 Despite an oversupply of employment land, the Core Strategy (2011) identifies a lack of good quality employment sites as a key issue for King's Lynn & West Norfolk. A planned restructuring of the economy aims to reduce the volume of manufacturing sites in the borough and increase light industry and office land uses, which will equate to between 7.6 ha and 29.4 ha of lost manufacturing employment land. Development of available land is mostly allocated mostly to the three main economic centres: King's Lynn with 50 ha, Downham Market with 15 ha and Hunstanton with 1 ha.

Mid Suffolk

- 3.25 The presence of Ipswich close to Mid Suffolk largely influences the supply of employment space in the district. Whilst most office-based firms tend to locate in Ipswich, some office development has occurred in the southern parts of Mid Suffolk where proximate benefits to the larger economic centre exist. Despite Stowmarket being the largest town in the district, its office provision is mostly restricted to local firms and ancillary use. In contrast, the industrial market in Mid Suffolk is relatively strong with a particularly high concentration of activity occurring around the Stowmarket area.
- 3.26 The Core Strategy (2012) for Mid Suffolk focuses employment growth for the district in six key locations: Stowmarket, Great Blakenham, Eye, Needham Market, Woolpit Business Park and the old airfield in Mendlesham. In addition, a new site has recently been allocated in the Stowmarket Area Action Plan for 39.5 ha of employment use at Mill Lane. Approximately 63 ha of employment land is vacant in the district, of which 14.7 ha was available to developers in 2011. It is expected that 4,615 new jobs will be created in this total available employment land if developed by 2026.

North Norfolk

- 3.27 Traditionally the commercial property market in North Norfolk has been rather modest, particularly when compared with other parts of the region. Although relatively limited development has occurred in the district over recent years, especially large greenfield site developments, some demand in the district for

industrial floorspace has led to the intensification of estates in the local area. The key strategic employment locations in North Norfolk are North Walsham and Fareham, which benefit from strong manufacturing and distribution bases.

- 3.28 To provide an additional 4,000 jobs in the district between 2001 and 2021, the Core Strategy (2008) for North Norfolk has allocated approximately 204 ha of available employment land in the district to support further economic growth. The largest allocation of land is in the principal settlements of North Walsham with 65 ha and Fakenham with 59 ha of additional employment land over the plan period.

Greater Norwich Area

Norwich

- 3.29 Norwich is one of the most significant economies in the East of England. As a relatively strong growth market for the region, it has and continues to attract a significant amount of development in and around the city. A key issue for the area is the protection of key strategic employment sites from large residential developments. In addition, much of the existing office premises are now out-of-date and a pattern has emerged of extensive, lower-density office developments occurring on the urban fringes of the city.
- 3.30 Due to the tightly bounded nature of the city, some of Norwich's major employment sites are located across the authority border in neighbouring South Norfolk (such as the Norwich Research Park and the Norfolk and Norwich University Hospital) and Broadland (such as the employment area alongside the Norwich International Airport). The Joint Core Strategy (2011) sets out the new employment allocations to 2026, with at least 100,000 sq.m of office floorspace in Norwich city centre, around 100,000 sq.m of B1(b) space in Norwich Research Park, and approximately 30 ha for a new business park around the airport. Although this 30 ha site is allocated in the Broadland authority area, separate planning permission has recently been granted for a 40 ha Aeropark development which straddles the authority boundary.

Broadland

- 3.31 Broadland is a considerably vast geographic area that comprises a wide range of employment sites. Over recent years, the district has performed well with close proximity to Norwich helping to attract firms to the local area. Much of the demand for employment space has been within established estates that provide high-quality new premises. In addition, demand has also existed for smaller industrial sites throughout the district. Overall, a shortage of available land for employment use subsists in Broadland with most of the sites available for development in the market characterised as infill sites.
- 3.32 Future growth in Broadland is envisaged around the 'growth triangle' area of Old Catton, Sprowston, Rackheath and Thorpe St Andrew. This mixed community is located northeast of Norwich and already houses the Broadland Business Park, which has been allocated an additional 25 ha of employment land for continued

growth. Other important development areas in Broadland include Rackheath where 25 ha of land has been allocated for a range of employment purposes.

South Norfolk

- 3.33 The office market in South Norfolk has performed strongly over recent times particularly when compared with the industrial market. Demand in the district for employment space has varied significantly, with geographic distance from the economic centre of Norwich seemingly a key determinant. One of the more successful employment locations has been Wymondham, which has benefited from its close connection to Norwich by attracting various service and blue chip occupiers to the local market. However other parts of South Norfolk to the south and east of the district have not experienced such strong take up rates.
- 3.34 The Joint Core Strategy (2011) for Broadland, Norwich and South Norfolk sets out where employment development should occur in the wider region in the future. The strategy document identifies two important locations in the South Norfolk district: Wymondham and Hethel. In regards to Wymondham, the plan allocates around 20 ha of employment land to be developed in the area for the purposes of a range of employment uses. For the Hethel area (which accommodates the Lotus factory and test driving facility and the Hethel Engineering Centre), the strategy proposes about 20 ha of land should be developed into a technology park that houses a number of high-tech engineering firms.

St Edmundsbury

- 3.35 Demand for employment land has increased in St Edmundsbury over recent years, both for office and industrial floorspace. The existing balance of land for employment use suggests an undersupply of office sites and an oversupply of industrial sites. This is principally due to the allocation of land at the Suffolk Business Park. Bury St Edmunds remains the main centre for development in the borough, despite a shortage of employment land restricting the market. A strong geographic connection with Cambridge has also enhanced the business culture and economic prosperity of Haverhill.
- 3.36 The Core Strategy (2010) for St Edmundsbury identifies Bury St Edmunds and Haverhill as the two key centres for employment growth in the borough. The strategy supports the allocation of 68.28 ha of employment land to the east of the Suffolk Business Park in Bury St Edmunds for a mix of uses. In addition, it is expected that employment opportunities in Haverhill will continue to increase from the links it benefits with Cambridge.

Conclusions

- 3.37 Breckland's employment space is dominated by industrial uses which account for 96% of total stock. In contrast, the District's commercial office stock amounts to just 4% of total employment space. Breckland has a larger supply

of industrial space overall than many nearby districts including North Norfolk, Broadland and Forest Heath.

- 3.38 Although employment space tends to be concentrated around Breckland's urban areas, the rural economy also accommodate important hubs of economic activity, particularly with regards to small scale office and workshop space.
- 3.39 The District has seen moderate levels of new development over the past eight years, the majority for B1c/B2 manufacturing uses and B8 warehousing. At the same time, Breckland has been losing B class space – largely industrial – to higher value uses such as retail.
- 3.40 Breckland has a fairly ageing stock of employment space and lack of modern business premises relative to other parts of the region. Overall vacancy levels for both office and industrial space are below a 'normal' market average, suggesting a relatively tight supply of space that is being marketed relative to demand.
- 3.41 Greater availability of employment space in neighbouring local authority areas is likely to pose a threat to Breckland when competing for future investments and relocations. This is particularly with a number of major employment land developments underway or proposed in a number of adjoining areas. However the commercial property market in Breckland is relatively robust with a particularly good offering of industrial floorspace. With strong links to economic centres like Norwich and Cambridge, Breckland has the opportunity to advance its role as a key service market in the sub-region and attract manufacturing and distribution activities to the local market.
- 3.42 The supply of employment space in the District's development pipeline comprises just over 116 ha of undeveloped allocations and extant planning permissions (at March 2012). This supply is distributed across the District but concentrated particularly strongly within the District's GEAs and the larger town of Thetford.

4.0 Breckland Commercial Property Market

- 4.1 This section provides an overview of the commercial property market in Breckland, including recent trends in demand and supply. The findings are mainly based on discussions with a number of commercial property agents active in the district, and where appropriate this has been supplemented with information sourced from commercial property databases and published reports.
- 4.2 It is pertinent to mention that the property market was considerably stronger when the 2006 Employment Land Review was conducted, yet at that time it was only possible to obtain a limited amount of information relating to lettings and rental values etc. Since the economic downturn there have been fewer deals, and as a result there is less market data to draw upon.
- 4.3 This section is broadly structured in terms of the district's five market towns – Thetford, Dereham, Attleborough, Watton and Swaffham – and, because of its significance in local employment land terms, the Snetterton Heath employment area.

UK Provincial Market Overview

- 4.4 The UK commercial property market is still recovering from the financial crisis of 2007-08 and the ensuing recession and property slump. Falls in the capital value and rental levels of office and industrial premises of up to 40% combined with stricter lending criteria from banks and the abolition of tax relief on empty property mean that property development is less profitable, finance is hard to obtain and the risks of developing space without an end-user identified are high. As a result, speculative development has become very rare in virtually all of the UK outside of prime London markets.
- 4.5 Nevertheless, a number of market commentators have recently reported that the regional commercial property market is starting to improve.¹² While this is encouraging, this may be due to a relatively small number of high profile transactions occurring in major provincial cities. In more economically marginal locations, and those without a significant existing commercial property market, there is still uncertainty and lenders and developers are likely to remain cautious.

¹² As reported by Lambert Smith Hampton's (UKIT Quarterly Bulletin, August 2013) and Savills (UK Commercial Development Activity Report, September 2013)

Market Geography

- 4.6 The commercial property market in Breckland is overwhelmingly focused on the industrial/distribution sector. The majority of activity occurs in Thetford which is situated on the A11 corridor and is the main gateway into Norfolk from London, the South, Cambridge and the Midlands.
- 4.7 Attleborough and Snetterton Heath also have good access to this strategic route and consequently have particularly appealed to businesses requiring industrial/distribution accommodation.
- 4.8 Situated on the A47, Dereham is not as well located for distribution purposes and the size of its office market is constrained as the town is relatively close to Norwich. However, it has the second largest property market in Breckland and experiences a reasonable level of activity compared to other market towns in the area.
- 4.9 Very limited activity occurs in Watton's property market, and even less in Swaffham. Due in part to their relatively small size, demand for any type of commercial accommodation in these towns tends to originate solely from local businesses.
- 4.10 As regards to infrastructure, work on improving a section of the A11 between Thetford and Barton Mills is currently on-going, and when this is complete the full length of this strategic road will be a dual carriageway. Agents indicated that there are already signs that this improvement will have positive implications for the development potential of employment land near to the A11, with most interest centred on Thetford given the plans for an urban extension.
- 4.11 Leases throughout Breckland are generally for a minimum of a three year term. While this may suit many firms, new business start-ups and SMEs may prefer more flexible, easy-in easy-out arrangements. One agent added that the district would benefit from having greater provision of incubation space.
- 4.12 However, some stock throughout the district – including in Thetford – is dated and/or poorly specified. To an extent this may satisfy certain local requirements for affordable business space, although such accommodation is considered to have very limited market appeal.

Industrial Market

Thetford

- 4.13 There is a well-developed market for industrial and distribution property in Thetford, which benefits from its central position in East Anglia, half way between Norwich and Cambridge, and by having comparatively low rents. By way of an example, agents indicated that the headline rent for modern industrial accommodation in nearby Bury St Edmunds and Newmarket is

currently c. £6/sq.ft, whereas in Thetford at best, it is around £3/sq.ft.¹³ Moreover, in Cambridge, which is struggling to secure land allocations for industrial use, it is currently reported to be £9.75/sq.ft.¹⁴

- 4.14 However, across the UK the vast majority of demand for warehousing originates from the retail and internet sectors, needing very substantial accommodation in more prominent and accessible locations than Thetford – an example of which is a recently completed 92,900 sq.m distribution centre for Marks and Spencer adjacent to the M1 at Castle Donington. In this sense the town is a secondary distribution location, as is reflected in its comparatively low rental values.
- 4.15 While not as strong as prior to the recession, agents commented that currently there is good, steady demand for all types of industrial accommodation in Thetford, and in overall terms there is currently equilibrium between supply and demand.
- 4.16 Most inquiries are for small units of around 465 sq.m or less that are suitable for B1c use, though there are also a number of larger requirements for industrial land and/or for units of around 4,645 sq.m. However, some requirements are proving difficult to satisfy, either because of the lack of modern, high quality premises which are on the market in Thetford at the moment, or because a business has a very specific need.
- 4.17 This has constrained industrial activity in the town for some time and in several cases has resulted in firms moving away. DPD Parcels, for instance, had been a long standing occupier in the town, but in April this year it moved to a new 3,340 sq.m purpose-built distribution warehouse at Snetterton Park, and its former premises in Thetford are still vacant. Similarly, Positive Lighting Solutions has recently relocated from Thetford by acquiring a unit at Acorn Business Park in Newmarket.
- 4.18 However, some firms are able to adapt their premises and wish to remain in Thetford, as is illustrated by TNT Express, who in 2011 completed a major refurbishment of its premises on the Fison Way Industrial Estate – a building that originally dates from the 1970s.
- 4.19 Agents also indicated that despite a steady level of demand for space, the severity of the recession coupled with the secondary nature of Thetford's location has implied that there has been very little interest from developers or investors. Accordingly, the town is characterised by a large amount of old poorly specified stock that is yet to be addressed by refurbishment or redevelopment.
- 4.20 The town's employment land allocations were generally considered to be appropriate, and agents were very supportive of plans for the urban extension especially in terms of the potential for Thetford Enterprise Park, the main commercial element of this scheme. However, as Thetford Enterprise Park will

¹³ Note: industrial rental values for Thetford are now lower than seen before the economic downturn, with the 2006 Employment Land Review informing that quoting average rents in the town had been £4/sq.ft

¹⁴ Reported by Bidwells in Business Space Data Book, Autumn 2013

now include a food store and a possibly a hotel, there was concern that this could imply that the remainder of this site is considered less suitable for various industrial/distribution activities.

Dereham

- 4.21 The industrial market in Dereham has never been as active as Thetford's, since situated on the A47, it is not as well located. Agents also commented that the town is still marred by the collapse in 2005 of the trailer maker, Crane Fruehauf.
- 4.22 Crane Fruehauf had been a major employer in Dereham, and its large, former premises on South Green, which is very close to Rashes Green Industrial Estate, the town's main industrial area, has now been vacant for many years. Apparently, there has been very little interest in this building from prospective occupiers or developers as it is situated in a residential neighbourhood and subsequently employment use here, has been and continues to be, constrained by perceived employment noise issues.
- 4.23 On the nearby Rashes Green Industrial Estate, Alpha Delta House, a 4,168 sq.m warehouse, has also been on the market for some time, and one of the agents informed that that a manufacturer from outside the area had been very interested in acquiring it. However, as this employment area is surrounded by housing as well, this deal was prevented from completing because of the same concerns about the potential impact on residential amenity. Accordingly, it is now felt that this building may remain unlet and in view of these circumstances a change of use to residential is being considered.
- 4.24 With the exception of these two schemes however, agents commented that levels of supply and demand in Dereham's industrial market are well balanced. A steady flow of requirements mainly from small local businesses has kept industrial rents in Dereham at a stable level in recent years.
- 4.25 In overall terms agents felt that Dereham's employment land allocations were appropriate. However, some agents expressed that the site which is intended to allow for the further expansion of the Rashes Green Industrial Estate will have very limited market appeal, especially in view of the noise constraint issue referred to earlier.

Elsewhere in the district

- 4.26 Of the remaining market towns in the district, Attleborough seems to have the largest, and most active, market for industrial space. Although the town itself has very good access to the A11, its largest industrial estate – Bunns Bank Industrial Estate - is located some distance from this on its southern periphery. Nevertheless, the agents informed that very few industrial units are currently vacant in Attleborough and stated that there is a good level of mainly local demand, especially for smaller units.

- 4.27 In recent years however a relatively large amount of development activity has occurred at Snetterton Heath, meaning that actually it now has a slightly larger provision of industrial space than Attleborough. With its connection to motor racing and exceptionally good access to the A11, this employment area has particularly appealed to a number of firms involved in either distribution or engineering. In this respect notable occupiers at Snetterton include CNC Machine Tools, DPD Parcels, as mentioned earlier, and QD, who has a 17,930 sq.m distribution centre here. Notwithstanding this appeal, agents consulted were not aware of any active requirements for industrial accommodation in Snetterton at the moment, with some questioning whether there would ever be sufficient demand from engineering or distribution firms to justify an additional allocation of land for employment use at this employment area.
- 4.28 Despite only being a relatively small market town and not having direct access to either the A11 or A47, a reasonable amount of industrial space has been developed in Watton – reflecting its main economic focus in light industry/engineering. As the town is not as accessible as Thetford there has never been much demand for industrial space from national or regional firms and instead the market is very reliant on local businesses. However, agents commented that the supply and demand for industrial accommodation in Watton is relatively well matched, and that a steady flow of requirements has kept industrial rents stable in recent years.
- 4.29 Due to its relatively small size, Swaffham has a generally limited commercial property market with the EcoTech Business Park (accommodating employers such as high-tech manufacturers STG Aerospace), Station Yard and Tower Meadows representing most of the town’s industrial provision.

Office Market

Thetford

- 4.30 Despite having a relatively strong economy, the office market in Thetford is neither as strong nor as developed as its industrial market. Agents emphasised that there is very little demand for office accommodation in the town, as is reflected in its low headline rent, which is currently £12.50/sq.ft. In comparison, according to recent research by Bidwells¹⁵, in nearby Bury St Edmunds the headline office rent amounts to £18/sq ft, in Norwich it is £16/sq.ft), and in Cambridge it is £34/sq.ft.
- 4.31 Much of Thetford’s office stock is dated and is in converted residential properties or space above retail units. Demand for office accommodation in the town has always been limited and reportedly mainly comes from A2 users who need to be close to their customers, such as solicitors, financial advisors/consultants etc., but these are usually relatively small requirements.
- 4.32 Agents indicated that due to the lack of demand it is now common for available premises to remain unlet/unsold for up to two years, and various incentives are

¹⁵ Bidwells in Business Space Data Book, Autumn 2013

usually needed to attract prospective occupiers. Nevertheless, as there is so little office stock in the town this issue has not affected the vacancy rate, which remains low, and rent values have held up well. Overall, agents generally consider that demand and supply are relatively well balanced.

- 4.33 In recent years only one new office building has been developed in Thetford, and this required financial support from the public sector – the Keystone Innovation Centre. It seems that this scheme, which was purposely developed in order to support small businesses by providing small office suites on a flexible basis has been a great success. It is currently over 90% occupied and since it was completed has provided affordable, flexible space for many local business start-ups. In addition, it now also accommodates a small number of businesses that have relocated to Thetford from places such as Norwich and London.

Elsewhere in the district

- 4.34 All of the other market towns in Breckland have very small office markets and the analysis we have conducted generally concurs with the findings of the 2006 Employment Land Review.
- 4.35 As such the towns have small, relatively inactive office markets. The vast majority of their office stock is dated and is in converted residential properties or space above retail units. Demand continues to be very limited and tends to be for small office units of 200 sq.m or less, and appears mainly to come from small local businesses and local high street employers such as banks and accountants. Since demand is so limited there has been very little development of new space and the likelihood of any speculative activity in the foreseeable future seems exceptionally remote. None of the towns have much vacant stock. However, when space becomes available it usually takes a considerable time to let, resulting in long void periods. In overall terms, agents considered that demand and supply are relatively well balanced in the district's market towns. Below are several further comments relating to the provision of office space in particular locations.
- 4.36 As an office location, several agents commented that Dereham continues to suffer from being located relatively close to Norwich, which has all the benefits of a city including greater choice of accommodation. And because of this issue there was some doubt whether the town could support a greater provision of office space. Nevertheless, reasonably good quality office accommodation has been available at the Breckland Business Centre for several years now and during this time it has sustained a very high occupancy level.
- 4.37 As yet, no office space has been provided at Snetterton. However, planning permission has been granted for a scheme which would provide c. 3,715 sq.m of office space, although we understand that there has been virtually no interest in this from prospective occupiers.
- 4.38 In 2006 the Wayland Partnership Development Trust opened the Wayland Business Centre in Watton, in order to support SMEs in the town and its

hinterland. It comprises six small, fully serviced office suites which are available on flexible basis, four of which are currently used. It was suggested that because of the severity of the recession it is proving very difficult to secure tenants here, and while the cost of operating the business centre has increased significantly in recent years, office rents have had to remain stable.

- 4.39 It is evident that the Ecotech Business Park in Swaffham now accommodates a small cluster of professional and financial services firms. However, agents emphasised that prior to the recession it was difficult to secure tenants here, and currently several units have been vacant for a considerable length of time but have attracted very little interest. Consequently, agents were doubtful as to whether there would ever be sufficient demand to justify retaining the adjacent plots of land that have been earmarked for employment use.

Needs of Local Businesses

- 4.40 In order to gain a better understanding of the needs of businesses operating within the District and the main factors that support and inhibit their growth, a series of telephone surveys were undertaken with a small sample of firms based in Breckland. The feedback obtained from these surveys is drawn out below and provides a snapshot of some of the key issues relating to future requirements for business space in the District.

Current Business Premises

- 4.41 The majority of companies surveyed were satisfied with their existing site and premises, which were generally cited as adequately meeting their current requirements. For the most part, the location, size and cost of premises were considered as suitable for meeting occupier's expectations. One small firm situated in an office unit in the town centre area of Dereham noted the location and state of their premises as desirable, but had concerns over the rising rates of such a central location. Other companies highlighted the access provided by their site as a key factor influencing their location decision, as excellent links were offered to other parts of the District and wider sub-region.
- 4.42 This feedback suggests the existing commercial property market in Breckland mostly meets the expectations of local firms, particularly those of a smaller size that primarily service the local market. Such firms typically don't require large high-grade premises, but seek more affordable and attainable units that better service their more limited operations. However a lack of larger modern sites for both office and industrial uses in Breckland does restrict the growth of local firms and can deter inward investment from outside the District.

Future Growth Plans

- 4.43 Rising business confidence as the economy emerges from a period of limited economic activity is signified by the majority of consulted firms who are considering expanding their site over the next 5-10 years to accommodate growth in their operations. Although mixed feedback was given as to where

firms expected expansion to occur, that is on-site or in another location, the majority of firms assumed that expansion would happen within the District. Those companies that assessed their site as flexible enough to allow expansion were typically medium to large sized industrial operations that benefitted from additional capacity on their site. Significantly, one large manufacturing firm comprising about 150 employees in Thetford was unsatisfied with the supply of available sites in Breckland and anticipated looking outside the District for more suitable premises.

Breckland as a Business Location

4.44 Some of the more common factors cited by businesses for remaining within Breckland include:

- Firms had built up a reputation and business base;
- Proximity to a highly skilled labour force;
- Good access to other markets from transport infrastructure;
- Support from the Council in helping grow key business sectors.

4.45 Generally, the feedback from surveyed firms suggested a reasonably positive outlook about the availability of commercial premises in Breckland, both for office and industrial space. Smaller firms were particularly satisfied with the supply of available premises in the District, which somewhat reflects their lower expectations compared to larger firms. The responses from larger businesses indicated some concern over a lack of available land on which to allow growth in their activities to occur. This is a principal issue for the office market in the District. Balancing the supply of commercial premises with the demand in the market represents a key challenge in Breckland, and is important for ensuring local firms are retained and new inward investment is attracted.

Summary

4.46 Key trends and implications for Breckland's property market can be summarised as follows:

- 1 Demand for employment space across the district continues to be heavily focused on small properties (office and industrial) with good accessibility to the strategic road network, in particular the A11.
- 2 Comparatively low rents and values throughout Breckland do not generally provide sufficient support for any form of development for employment use – especially at the moment given the severity of the recession.
- 3 The property market is overwhelmingly focused on the industrial / distribution sector and most activity occurs in Thetford, due to its proximity to key centres outside the district and linkage to the strategic road network. Demand is much weaker elsewhere in the district.
- 4 Attleborough and Snetterton have good access to the A11 and consequently have particularly appealed to businesses requiring

industrial/distribution accommodation. However, Snetterton is experiencing difficulty in becoming established as an office location.

- 5 Despite having the second largest property market in the district, Dereham is not as well located for distribution purposes and the size of its office market is constrained as the town is relatively close to Norwich.
- 6 Very little activity occurs in Watton's property market, and even less in Swaffham. Due to their small size and relative remoteness, demand for any type of commercial accommodation in these towns tends to originate solely from local businesses. There appears to be very little appetite for further development of the Ecotech Business Centre, and the Wayland Business Centre in Watton, which was specifically set up to support local SMEs, seems to be struggling.
- 7 Some stock throughout the district is dated and/or poorly specified. It is evident that this issue has already constrained industrial activity in Thetford and may have affected other locations as well.
- 8 Business feedback indicates that firms based in Breckland are generally satisfied with their existing premises and confident that any future expansion could be accommodated within the District, although some larger firms expressed concerns over a lack of available land for future expansion. Nevertheless, the District's good transport connections and proximity to a skilled labour force continue to maintain its popularity and sustainability as a business location.

5.0 **Review of Employment Sites Portfolio**

Introduction

- 5.1 This section presents the findings of an assessment of employment land supply in Breckland, which considered the characteristics and quality of existing and undeveloped employment sites in the District and their suitability to meet future employment development needs.
- 5.2 In consultation with the council it was agreed that the assessment should be structured on 36 employment sites, collectively amounting to 478 hectares. The majority of these sites (30) are allocated for employment use, although six are currently classified as non-general employment areas for the purposes of existing policy DC6.
- 5.3 It is relevant to highlight that in terms of Thetford's planned urban extension, the assessment only included the 18 hectares of employment land earmarked for Thetford Enterprise Park, which has outline consent. However, another 22 hectares are allocated for employment use as part of this major proposal. Similarly, the assessment only considered current employment land allocations at Snetterton Heath, and it is appreciated that this provision could be increased by an additional allocation of 20 hectares for employment use.
- 5.4 All 36 sites that featured in the assessment were inspected and, in accord with Government guidance on Employment Land Reviews, assessed against the following criteria:
- e strategic and local road access;
 - f proximity to labour and services;
 - g adjoining uses that might constrain employment uses;
 - h site size, characteristics and potential development constraints; and
 - i market attractiveness
- 5.5 Other factors were also noted including suitability for specific uses, planning constraints, potential timescale for delivery, and whether there were any barriers to the delivery of undeveloped sites. Site location plans are included at Appendix 4 and details of the criteria used to assess sites are in Appendix 5. Appendix 6 contains a detailed assessment of each site against these criteria, along with commentary to supplement the formal appraisal exercise.
- 5.6 It should be noted, however, that this assessment process in itself does not necessarily provide a complete picture of the local significance of certain sites. A site, for example, could be considered as having the potential of satisfying particular business or sector needs, which can be important reasons for retaining it, even if it does not perform well against conventional site assessment criteria. A broader commentary is therefore provided on each site to supplement the formal scoring exercise.

- 5.7 Further to presenting an overview of the employment land considered in this assessment, a summary description is provided for each of the assessed sites, with corresponding reference number shown in square brackets. This is structured in terms of the following geographical sub-areas: the five market towns of Breckland (Attleborough, Dereham, Swaffham, Thetford and Watton); the Snetterton Heath employment area; and other areas, which comprises Weeting and rural locations.

Overview of Sites

- 5.8 As summarised in Table 5.1 below, in overall terms 478 hectares of employment land was assessed in this study, of which just over a third (36%) is in Thetford; 16% is in the Snetterton Heath employment area; and mainly due to the size of the Shipdham Airfield Industrial Estate, 12% is rurally located.
- 5.9 The assessment also revealed land that is currently undeveloped. While some of this can be accounted for by allocated land that is yet to come forward at Snetterton Heath and by the site earmarked for Thetford Enterprise Park, many existing employment sites that were assessed are only partially developed. A good example of this is the Ecotech Business Centre in Swaffham. It is worth noting that this supply of undeveloped land in part will reflect the fact that the Site Specific Policies and Proposals DPD was adopted relatively recently in January 2012.

Table 5.1 Distribution of employment sites

Location	Number of sites	Total Site Area (ha)	% of total site area
Attleborough	4	33.6	7%
Dereham	5	50.0	11%
Snetterton Heath	2	73.9	16%
Swaffham	5	25.2	5%
Thetford	7	173.8	36%
Watton	4	30.1	6%
Weeting	2	33.4	7%
Rural locations	7	58.5	12%
Total	36	478	100%

Attleborough

- 5.10 **Bunns Bank Industrial Estate [1]** totals 12.4 hectares and is the largest employment area in Attleborough. It is rectangular in shape, extending mainly along Bunns Bank (road) with a relatively small frontage onto the B1077 (Attleborough Road). Located approximately 2.7km south from Attleborough's town centre and surrounded by fields, the site does not have good access to local services, and access to the strategic road network is considered poor because of the need to travel through Attleborough's urban area in order to get

onto the A11. The estate itself mainly comprises warehouses and workshops. While part of the site is very much in employment use, in recent years some buildings have been demolished and a large parcel of land to the rear of the site is currently only used for parking. In overall terms there is currently 1.3 hectares of undeveloped land on this site, although it is understood that Banham Group have recently put forward a proposal for the development of a new poultry processing facility here, which may bring this figure down. On the whole, when considered against assessment criteria this estate rates as an average quality employment site.

- 5.11 **Gaymer Industrial Estate [2]** is located next to Attleborough railway station, and is a fully developed designated employment site, amounting to 11.4 hectares, which is within walking distance to local services and the town centre. Immediately to the south the site is flanked by playing fields, while to the north (on the opposite side of the railway line) and to the east there is mainly housing. The estate itself mainly comprises a mix of warehouse and workshop units, which vary in terms of size, age and specification. Some units are arguably dated and/or poorly specified. However, when the site was inspected only one unit appeared to be vacant. In summary, this site is rated as average against the set assessment criteria, although its access to the strategic road network is considered poor because of the need to travel through Attleborough's urban area in order to get onto the A11.
- 5.12 **Haverscroft Industrial Estate [3]** is a 5.5 hectare site is located off London Road on Attleborough's southern fringe. It is considered to have reasonable access to local services, and good access to the strategic road network. Part of the site has been developed as the industrial estate, which in overall terms is relatively small and mainly comprises a mix of warehouse and workshop units. However the site also includes an undeveloped parcel of land, amounting to 2.9 hectares. An estate road has been constructed on this undeveloped plot and it is understood that all the main services are connected. In overall terms the estate rates as a good quality employment site.
- 5.13 **Saved Employment Allocation (Attleborough) [4]** relates to part of a field (4 hectares) which is currently in agricultural use. Like Haverscroft Industrial Estate the site is located off London Road on Attleborough's southern fringe. While it is therefore also considered to have reasonable access to local services, and good access to the strategic road network, the potential environmental impact and cost of providing infrastructure and services are obvious barriers in terms of this site coming forward. Overall however, if these constraints can be overcome, this site could deliver employment development in a good edge of town location offering excellent strategic access. The site has recently secured planning permission for a mixed use residential and employment development providing up to 12,000 sq.m of employment floorspace (for use classes B1 and B8). This permission is subject to a legal agreement relating to the marketing of employment land to stimulate delivery of the site. This is an average employment site when considered against assessment criteria.

Dereham

- 5.14 **Dereham Business Park [5]** is located between a Tesco superstore and Breckland Council offices. This 5.3 hectare site comprises a caravan showroom (Greentrees Adventurestore) and 11 light industrial units, all of which were in use at the time of the assessment. The build quality of this scheme, which was completed relatively recently, is considered to be good. A small overgrown plot (1.1 hectares) on the site is undeveloped and has planning permission for retail development. The site features excellent connectivity to the A47 trunk road, though local access maybe an issue at times due to traffic associated with the superstore. In summary, this is a very good employment site when considered against assessment criteria.
- 5.15 **Dereham Business Park [6]** is a 3.2 hectare site currently in agricultural use, which is located immediately to the east of the existing Dereham Business Park. The site is bordered by existing development at Walpole Loke, including the Breckland Council Offices. Overall, the site could offer the potential for employment development subject to local road enhancements and infrastructure provision, though this is unlikely at least in the short term, due to the considerable costs this will involve. In overall terms this site achieves an average score when considered against assessment criteria.
- 5.16 Totalling 25.1 hectares, **Rashes Green Industrial Estate [7]** is the largest employment area in Dereham. It comprises a mix of warehousing, light industrial and office units, and notably includes the Trafalgar House Business Park, where SCWS, who provide structural steelwork, has a 20,000 sq.m workshop facility. The site is fully developed with buildings of mixed age, some of which require upgrading. It is located next to a junction for the A47 so potentially has very good access to the strategic road network. However, access is via the Shipdham Road (A1075) which also serves the large, adjacent residential area, and this road was exceptionally busy when the inspection occurred. Despite this potential constraint, internal roads on the estate are good and there is ample onsite parking. Plus the nearby residential area implies that the site has good access to labour and a range of local services are also within reasonable walking distance. Several units were vacant at the time of the assessment, notably including a 4,168 sq.m warehouse on a 1.05 hectare plot. Overall, this site performs reasonably well against the assessment criteria.
- 5.17 **Rashes Green Industrial Estate [8]** is a 3.2 hectare greenfield site surrounded by low density housing on two sides and existing employment use on the remainder. Consequently, as it bordered by several mature trees it effectively delimits industrial development from nearby housing. Potentially an access road to service this site could be extended from the existing Rashes Green Industrial Estate. However, further infrastructure improvements would be required and despite its good strategic location the site has limited commercial appeal. In overall terms it achieves a slightly below average score when considered against assessment criteria.

- 5.18 **Yaxham Road Industrial Estate [9]** is located next to a junction for the A47 and has excellent access to local services and the strategic road network. The estate is also well serviced by Green Road, its main internal road, and there is ample parking. Totalling 13.2 hectares the site appears to be fully developed, though towards the rear of the estate one plot is only used for truck parking by a road haulage business. With the exception of this plot, the site has been developed so as to provide a mix of warehouse and light industrial units, which vary in terms of size and age, and the build quality of the estate is considered to be relatively good. When the inspection occurred no units were vacant. Overall, this site performs reasonably well against the assessment criteria.

Snetterton Heath

- 5.19 The Snetterton Heath Employment Area is located on the A11 between Thetford and Attleborough, on the former Snetterton Airfield. Two sites here have been designated for employment use, one on the northern side of the A11 (Snetterton North) and a far larger site to the south of the road, on part of the old airfield (Snetterton South). The Snetterton racing circuit is also at the airfield which is used for car and superbike racing events. In addition, the airfield also features Snetterton Park, a major visitor attraction, which accommodates a very large Sunday market and now includes the Model and Toy Expo. Snetterton Heath's proximity to the A11 provides excellent accessibility to the strategic road network, though presently there are limited public transport links to the employment area and as a result it is relatively inaccessible for people who do not own a car. The Attleborough and Snetterton Heath Area Action Plan Issues and Options paper notes that there is potential to improve transport links to Snetterton through developing an existing railhead for transporting goods. The employment area is also near to Eccles Wood, a County Wildlife site.
- 5.20 The **Snetterton North [10]** site comprises 9.2 hectares and has been fully developed by Tila Properties to provide five industrial units ranging in size from 465 sq.m to 2,600 sq.m. At the time of the assessment one of these units, a distribution warehouse amounting to 1,765 sq.m was available to let or buy. This site performs reasonably well against the assessment criteria.
- 5.21 **Snetterton South [11]** amounts to 64.7 hectares of land, approximately 33.6 hectares of which has been built out mainly for light industrial and warehousing uses. The site is now an established distribution hub, and notably includes several large warehouses used by Richard Johnston Logistics as well as a new parcel depot amounting to approximately 3,400 sq.m, which was delivered to Geopost UK earlier this year and is used by its subsidiary DPD Parcels. However, there may be insufficient electricity capacity in the area, which could constrain further development at this site. This factor is reflected in the grading of this site, which in overall terms is accordingly rated as average when considered against the assessment criteria.

Swaffham

- 5.22 Swaffham's employment areas are concentrated around its northern outskirts with the principal location being this 14.1 hectare site, the **Ecotech Business Park [12]**. Situated next to the A47 and mainly fronting onto Castle Acre Road, which forms a major route through Swaffham, the site has very good access to the strategic road network. It includes the distinctive EcoTech Centre, a visitor centre dedicated to the promotion of sustainable development and environmental issues, which has a strong education and training element backed by the involvement of the University of East Anglia. Adjacent to this, and mainly extending off Turbine Way (the main internal road for the business park), is a mix of office, light industrial and some warehouse units all of which have been developed to a very high standard and appear to have exceptional sustainable credentials, though a number of these units were vacant when the assessment occurred. This provision is serviced by excellent internal roads and there is ample offsite parking. It is evident that the business park accommodates a small cluster of professional and financial services firms, with for example, one building occupied by Mansell Construction Services and another nearby unit occupied Manorcourt Homecare. In many respects the development of this site seems to have been a great success. However, it still features several plots that are yet to be developed (collectively amounting to 3.6 hectares), and market feedback indicates that there is very little interest in any of this land. And, while it is recognised that a bus service is available, the linkage between this employment area and Swaffham's town centre is arguably weak. Despite this, in overall terms this site performs exceptionally well against the assessment criteria.
- 5.23 There are also two further undeveloped plots adjacent to the Eco-Tech Employment Area, which have been allocated for employment use. Amounting to 3.1 hectares, **Land North of the Ecotech Emp Area [13]** is a small arable field, between the main Ecotech Business Park and the A47 trunk road, which is screened by trees and hedges on the western, eastern and southern boundaries. It has an irregular shape which will limit opportunities for large industrial units and some of the trees on the southern boundary of the site will need to be removed in order to achieve a suitable development. Totalling 5.9 hectares, **Land West of the Ecotech Emp Area [14]** consists of a larger field to the west of the Eco-Tech Employment Area, and is notably bounded by dispersed housing to the south on Bears Lane and to the west on West Acre Road. Part of this plot is on a backfilled quarry, so potentially remediation and ground contamination work may be required. The Site Specifics Policies and Proposals DPD, adopted in early 2012, sets a requirement for a phased release of this land - see Policy SW2 and Policy SW3. Nevertheless, as is the case with undeveloped plots on Ecotech Business Park, market feedback indicates that, in the short term at least, these sites are unlikely to generate sufficient interest for employment-led development. This factor is reflected in the grading of these sites, which in overall terms are accordingly rated as average which considered against assessment criteria.

- 5.24 Also off Castle Acre Road and closer to town centre, is **Station Yard [15]**, which is where Swaffham's former railway station is located. This small fully developed, employment area, amounts to 1.5 hectares and other than the old station building itself, comprises a car park and a terrace of ten small garage workshops, which is owned and managed by the council. The terrace is of reasonable condition and at the time of the assessment only one of the units was vacant. And the site has good access to local services. However, while it may fulfil a local requirement of providing affordable business space, this accommodation is considered to have very limited market appeal. Overall, this employment site performed relatively well when considered against assessment criteria.
- 5.25 On the opposite side of Castle Acre Road from Station Yard is **Tower Meadows [16]**, which is located on an embankment, formerly used as railway sidings. This is another small fully developed employment area, which amounts to 0.5 hectares. Owned and managed by Glen House Estates the site comprises four small, relatively recently completed, warehouse units. Good access to this space is provided by Tower Meadow Roads, there is ample parking, and local services are within walking distance. None of the units were vacant when the assessment occurred. On the whole this employment site performed relatively well when considered against assessment criteria.

Thetford

- 5.26 **Brunel Way Industrial Estate [17]** is a long standing employment area which fronts onto Mundford Road (the A1066) near to its junction with the A11, and it subsequently has excellent access to the strategic road network. Amounting to 38.7 hectares it predominantly comprises warehouses and workshop units, though also features some office space. The estate includes a large warehouse/factory unit used by Jeyes, who manufacture household cleaning products, and the Keystone Enterprise Factory. The latter comprises small factory and office units and is operated by Keystone Development Trust, a community organisation that provides business support. The site is well serviced by Brunel Way, its main internal road, and there is ample offsite parking. It appears to be fully developed, though some plots may be underutilised and/or there could be scope for some infill. Some stock on this estate is dated and/or is poorly specified, and at the time of the assessment some units were vacant. In summary, this is a very good employment site when considered against assessment criteria.
- 5.27 **Burrell Way Industrial Estate [18]** is situated to the south west of Thetford and fronts onto London Road (A1075) near to its junction with the A11. Providing mainly light industrial and warehousing uses this is another large, long standing employment area (amounting to 30.6 hectares), which appears to have been developed by a number of parties at different periods of time, as is evident by the fact that it comprises the Burrell Way Trading Park and the Stephenson Way Industrial Estate. Some of the accommodation notably in the latter was probably developed during the 1970s, and such units may benefit from being upgraded. However, many premises in the employment area seem to have

been developed more recently and are of reasonable standard. The employment area is well serviced with internal roads, mainly Burrell Way and Stephenson Way, and there are good turning points for HGVs and ample offsite parking. When inspected there was a reasonable amount of activity throughout the employment area, though it was noted some units were vacant. In summary, this is a good employment area when considered against assessment criteria.

5.28 **Caxton Way Industrial Estate [19]** also fronts onto London Road, and is situated on the northern side of the road, directly opposite the Burrell Way Trading Estate. Totalling 22.1 hectares this fully developed employment area mostly comprises former food production facilities alongside ancillary storage and associated office accommodation. The majority of these were once owned by Tulip International (bacon, beef and pork product producers) who ceased operations in Thetford in 2007 and closed this site in 2009. At the time of the assessment there was no activity on this estate and some of the buildings here lack vitality and are in need of redevelopment or extensive refurbishment. Two developed sites within the employment area are currently being marketed – the 2.7 hectare Saxon site, which comprises a redundant factory building, and a 2.1 hectare site referred to as Room 29, which comprises a warehouse amounting to c. 4,900 sq.m. After a period of relatively lengthy marketing, there is now reported to be some interest in this site from a large food manufacturer. Taking these factors into account, when considered against assessment criteria this is viewed to be an average employment area.

5.29 **Caxton Way [20]** is a triangular-shaped site allocated for employment use amounting to 7.1 hectares, which lies between the A11 and the Caxton Way Industrial Estate. Potentially the access road to Room 29, a large warehouse on the Caxton Way Industrial Estate (see above), could be extended to service this site as well. However, some further infrastructure improvements would be required and market feedback indicates there is very little interest in this site. There is very little scope for this employment area to come forward until there is greater certainty regarding the future use of the Caxton Way Industrial Estate. In overall terms this site achieves an average score when considered against assessment criteria

5.30 **Fison Way Industrial Estate [21]** is another long standing employment area which fronts onto Mundford Road (the A1066) near to its junction with the A11. Comprising 48.2 hectares the estate is Thetford's largest existing employment area and mainly comprises warehouses and light industrial units. It is an established distribution hub and occupiers in this respect notably include TNT Express, DHL and Brakes Bros Ltd. The site is exceptionally well located to utilise the strategic road network, has good internal roads and ample offsite parking. However, as is the case elsewhere, some of the stock on this estate is dated and/or is poorly specified. And, when the site was inspected it was noted that some units were vacant. Nevertheless, in overall terms this is a good employment area when considered against assessment criteria.

5.31 **Site adjacent to Fison Way Industrial Estate [22]** is suited to the north east of the existing employment area and mainly comprises a large arable field. This irregular shaped 8.9 hectare site is screened by trees and hedges on the

western, northern and eastern boundaries, beyond which to the east is housing. This allocated employment site forms part of the town's proposed urban extension and as such is subject to policy TH29 of the Thetford Area Action Plan (TAAP). There are back-filled pits and old landfills in some of the land that has been allocated for the urban extension so potentially remediation and ground contamination work may be required. The site could effectively form an extension to the Fison Way Industrial Estate so would be particularly suited to warehousing and light industrial employment uses. In summary, this is a good employment area when considered against assessment criteria.

5.32

The employment land earmarked for the development of **Thetford Enterprise Park [23]** is situated south of the A11, to the north west of Thetford. Amounting to 18 hectares this greenfield site is adjacent to the existing Brunel Way and Fison Way employment areas and is a very well located for utilising the strategic road network. Thetford Enterprise Park is intended to be a key element of Thetford's Urban Expansion, a major residential-led mixed use proposal by Crown Estates. Outline consent has been obtained to redevelop this site to provide c. 69,680 sq.m of commercial accommodation. However, access to the site needs to be improved by the construction of a new spur road and roundabout; levelling of the site needs to occur, and a range of other infrastructure improvements need to be made. And the scheme has faced financial uncertainty in that a £1.5m public sector contribution towards the cost of bringing the site forward was lost due to the demise of the East of England Development Agency. Nevertheless the scheme is still progressing and consent has recently been granted for a new 6,000 sq.m food store on a 3 hectare plot on this site, and while this will result in a loss of employment land it includes a number of measures to facilitate employment development on the remainder of the site. Despite these constraints, in overall terms this site performs exceptionally well against the assessment criteria.

Watton

5.33

Griston Road Industrial Estate [24] fronts onto Norwich Road (the B1108), and is located within Watton's urban area, about 0.5km to the east of the town centre, so has very good access to local services. The 4.3 hectare site has a relatively narrow frontage on the southern side of Norwich Road, and is bounded by Griston Road to the east and by Linmore Crescent to the west. It is principally accessed via Linmore Crescent and is fully developed providing a mix of workshop and warehouse units, which vary in terms of size and age. The estate caters for a range of mainly Watton based businesses and at the time of the assessment, none of the units appeared to be vacant. However, the employment area is clearly long standing, and while many units are still in use a small number of buildings fronting onto Griston Road are now standing derelict. In recent years a considerable amount of new housing has been developed in Watton and this is now clearly encroaching on this estate. Taking into account that Watton doesn't have good access to the A11 corridor, or the A47, this means in overall terms this site achieves a poor score when considered against assessment criteria.

- 5.34 **Norwich Road Industrial Estate [25]** is situated on the eastern outskirts of Watton and comprising 11.2 hectares is the largest employment area in this town. It provides a range of office, workshop, storage accommodation, including at the rear of the site some high bay warehousing. This accommodation varies considerably in terms of age, size and specification. Some stock is dated and would benefit from being upgraded. However, alongside this are buildings which clearly were completed relatively recently and are of a much higher standard. Two business parks are located on the estate – Brecklands Business Park and the New Green Business Park – and at the time of the assessment both had available property to let. The site, which has significant amount of frontage onto Norwich Road, is served by a number of access roads and has ample offsite parking. And, access to this site has benefited from the recent completion of a new roundabout on Norwich Road. Although the employment area appears to be fully developed utilisation of some land is poor and there is scope for a certain amount of infill. While the estate has good access to a new neighbourhood centre (as detailed in the following section) the range of services this provides is limited and it's almost 2km to Watton's town centre. In addition, as mentioned earlier, Watton has poor access to the strategic road network. Consequently, in this assessment this site achieves an average score.
- 5.35 **Part of RAF Technical Site [26]** is an allocated employment site amounting to 2.2 hectares and which forms part of the of the former RAF Watton technical site. The site is situated on the southern side of Norwich Road, directly opposite the side of Norwich Road Industrial Estate. Planning permission was granted in 2006 for a major mixed-use development notably including 624 new homes, a neighbourhood centre, and employment development on this 2.6 hectare site. Since then, with the exception of the commercial element of this proposal, this scheme seems to be nearing completion. The site earmarked for employment use has been cleared, but that is the extent of any onsite activity. It has poor visibility from Norwich road and market feedback indicates that currently there is very little interest this site, and in part this is due to the fact that the Norwich Road Industrial Estate has vacant accommodation. When considered against assessment criteria this site is viewed to be an average employment area, however consideration could be given to using it for an alternative use.
- 5.36 **Threxton Road Industrial Estate [27]** is an allocated employment area situated on the western outskirts of Watton, and is surrounded by fields to the south and west. Amounting to 12.4 hectares it consists of a relatively modern and established industrial estate, which mainly comprises of workshops and small warehouse units. The site is well laid out and appears to be fully developed, though potentially there is scope for a small amount of infill. The estate caters for a range of mainly Watton based businesses, notably including Nature Menus Ltd, who manufacture pet foods and are a sizeable occupier on the estate. At the time of assessment several units were noted to be vacant, but market feedback indicated that there is strong, local demand for accommodation on this estate. In overall terms this site performs well against the assessment criteria.

Weeting

- 5.37 Two employment sites in Weeting feature in this assessment. The first of which fronts onto the A1065, **Mundford Road [28]** and is adjacent to Brandon's railway station. Therefore, as this 23.5 hectare site is within walking distance to Brandon's town centre, it was viewed as having good access to labour, local services, and the strategic road network. Much of this allocated employment area has been developed out - the northern part of this site is occupied by Oranmore, and adjacent to this is a plot used as a timber yard. Some of the remaining land in between the timber yard and station is used for parking, but is mostly unused, neglected and overgrown. The 2006 Employment Land Review cited that this undeveloped plot could be suitable for a mixed-use scheme given the combination of its close proximity to the town centre and that Brandon railway station provides services to notably Cambridge, Norwich and Thetford. However, before employment development can occur on this plot a significant financial outlay will need to be made to address remediation and infrastructure issues. Consequently, when considered against assessment criteria, this employment area achieves an average score.
- 5.38 The other employment site in Weeting is situated on **Fengate Drive [29]**, near to the junction with Brandon Road, and which is flanked by a railway line on its southern border. This 9.9 hectare site comprises various, well established industrial activities – noticeably including a plant used by Tata Steel. It also features a relatively large amount of undeveloped land, although this will require significant remediation work and lacks market viability – especially at the moment, given that 4 of the 9 small light industrial units in the nearby Station Way development (in Suffolk) are currently vacant. The site is at risk of flooding and there is the potential that further built development will adversely affect the integrity of the Breckland SPA. In overall terms therefore, this site achieved a low score against the assessment criteria.

Other Areas

- 5.39 On **Heath Road, Banham [30]** are two small employment sites that are classified as a non-general employment area. Both sites are fully developed and together amount to 1.4 hectares of land. The first site lies approximately 0.5km of the main residential element of the village and comprises several warehouses and workshops used by Full Circle Enterprises, who repair buses and other commercial vehicles and is a long standing local business. Situated on the second site, which is a short distance beyond this, is a small industrial development comprising a number of small starter units. At the time of assessment none of the premises at either of these sites appeared to be vacant. While this employment area has poor access to the strategic road network, it is noted that the Spatial Strategy identifies that a rural settlement such as Banham will provide for nominal housing and employment growth where local capacity allows. In overall terms these sites rate as average quality for employment use.

- 5.40 **Dereham Road, Beeston [31]** is another employment site which serves a rural settlement and that is classified as a non-general employment area. This 5 hectare site is located on the western side of the Dereham Road as it approaches the village and has been developed to cater for a variety of employment uses, but mainly comprises warehousing. It is rurally situated and is surrounded by fields, notably to the north, west and south. Potentially there is a scope for a small amount of infill, but in the context of the village and the surrounding area a large amount of employment space has already been developed on this site. VOA data indicates that there is 11,480 sq.m of commercial space in the Beeston area and most of this provision can be accounted for by what has been developed at this site. Because of the distance to the A47 and the fact that Dereham Road is badly aligned, the site is considered to have very poor access to the strategic road network. In overall terms it achieves a poor score when considered against assessment criteria.
- 5.41 **Rookery Business Park [32]** is situated approximately 3.5km to the east of Attleborough, near to the A11 and fronts onto Silver Street. Amounting to 7 hectares this site is surrounded by fields and is classified as a non-general employment area. Access to the site from the north, via Norwich Road, is adequate. However, Silver Street extends to Besthorpe and this narrow country road is not suited for heavy traffic or HGVs. The site is fully developed and it mainly comprises comparatively new warehouses and light industrial units, though it also features a small provision of office space and a gymnastics facility (Use Class D2). The site has poor access to local services and has no apparent public transport links. However, the business park was relatively busy at the time of the inspection, when it was noted that one of the warehouses maybe vacant. In overall terms this site achieves a poor score when considered against assessment criteria
- 5.42 In the village of Griston is a small, fully developed employment site, also known as Coughtrey Industrial Estate. Situated on the western side of **Church Road [33]** and adjacent to a number of houses, this 1.4 hectare site is almost directly opposite the former Quantrells Industrial Estate, which stands derelict and overgrown. Mainly providing light industrial workshop accommodation Coughtrey Industrial Estate has good access from Church Road and ample parking. At the time of the visit it was evident that the site is used by a number of businesses - notably including Breckland Precision Engineering and Supernova Racing – and none of the accommodation appeared vacant. In overall terms it achieves an average score when considered against assessment criteria.
- 5.43 Situated in open countryside, **Camp Farm [34]** is located between the small settlements of Roudham and Harling Road, approximately 1.6km to the north east of the village of Bridgham and about 11km to the east of Thetford. The 7 hectare site is fully developed and consists of 12 single storey buildings of vary sizes, approximately comprising 28,533 sq.m. In the past these buildings were used solely for agricultural storage, but now a number are used for commercial storage (Class B8) instead. There wasn't much activity at this site when it was inspected, which is classified as a non-general employment area, although it is

clearly very much in use. Despite its rural location access to the site is considered to be reasonable - the site fronts onto the Roudham Road, which is wide enough for HGVs and the A11 is just a short distance beyond Harling Road. However, the site has poor access to labour and local services. In overall terms this site achieves a poor rating when considered against assessment criteria.

- 5.44 At the junction of Roudham Road and the B111 in the small settlement of Harling Road is the **Roudham/Harling Road Industrial area [35]**. Trees and dispersed housing surrounds much of this 14 hectare site, and immediately to the north it is flanked by a railway line. The site mainly comprises a mix of single storey warehouse and workshop units, which vary in terms of size. Some of this is clearly dated, though most of this accommodation has been built relatively recently and is of reasonable quality. Although the employment area appears to be fully developed utilisation of some land is poor and there is scope for a certain amount of infill. When the assessment occurred there seemed to be a possible lack of parking, as vehicles were parked in the verges on either side of Roundham Road, and an advertising board was noticed, which indicated that several units were available to let. We also note that the Core Strategy informs that Harling will receive an allocation of 50 new homes, which supports the need for this employment area. In overall terms this site achieves an average score when considered against assessment criteria.
- 5.45 Part of the former Shipdham airfield comprises **Shipdham Industrial Estate [36]**, an allocated employment area amounting to 22.2 hectares. Rurally situated this site is mainly surrounded by arable farmland. It fronts onto Mile Road (the C197), and via the A1075, Dereham is approximately 9km to the east and Watton is about 12km to the west. Subsequently, this site has poor access to local services, is relatively inaccessible to people who do not own a car, and while Mile Road is suitable for HGV traffic, access to the strategic road network is considered to be poor. Its relative remoteness from populated urban areas and previous use as an airforce base also means that site is identified in the Core Strategy as being suitable for heavy/bad neighbour industrial development, which has employment implications. Taking this factor into consideration, the site comprises various, well established industrial activities, noticeably including the cranes that Falcon Cranes has for hire, a waste recycling facility and a number of substantial warehouses. A large amount of land at this site is underutilised although this will require significant levels of infrastructure to be put in place to make it viable for employment use. In overall terms therefore this site achieves an average rating when considered against assessment criteria.

Conclusions

- 5.46 Overall, the assessments of existing and allocated sites indicate that the District contains a reasonable range of employment sites of differing quality and type, totalling 478 ha. The majority of sites assessed were General Employment Areas (GEA) although a sample of non GEAs was also assessed.

Most of the sites accommodated industrial (B1C/B2/B8) uses, although some specific B1 sites were also evident.

5.47

The overall quality of existing and allocated employment sites appeared adequate to meet future needs with relatively few categorised as lower quality. The assessment process identified 14 high performing, good quality sites accounting for 44% of total supply, 16 (49% of supply) average quality sites and six sites of lower quality (7% of supply). A summary of these site rankings is provided in Table 5.2. The broad categories of 'good', 'average' and 'lower quality' are intended to provide a broad indication of the overall quality of employment land supply rather than a comparison of one site against another.

Table 5.2 Summary of Site Ranking by Score

Site Ref	Location	Site Name	Site Status	Area (ha)	SCORE (/30)	RANK
23	Thetford	Thetford Enterprise Park	GEA	18.1	26	Good
12	Swaffham	Ecotech Business Park	GEA	14.1	25	
5	Dereham	Dereham Business Park	GEA	5.3	23	
9		Yaxham Road Industrial Estate	GEA	13.2	23	
17	Thetford	Brunel Way Industrial Estate	GEA	38.7	23	
21		Fison Way Industrial Estate	GEA	48.2	23	
18		Burrell Way Industrial Estate	GEA	30.5	22	
22		Site adj. to Fison Way Ind' Estate	GEA	8.9	22	
16	Swaffham	Tower Meadow	GEA	0.5	21	
15		Station Yard	GEA	1.5	20	
27	Watton	Thrextan Road Industrial Estate	GEA	12.4 5	20	
3	Attleborough	Haverscroft Industrial Estate	GEA	5.5	19	
6	Dereham	Dereham Business Park (Ext')	GEA	3.2	19	
10	Snetterton Heath	Snetterton North	GEA	9.2	19	
7	Dereham	Rashes Green Industrial Estate	GEA	25.1	18	Average
11	Snetterton Heath	Snetterton South	GEA	64.7	18	
19	Thetford	Caxton Way Industrial Estate	GEA	22.1	18	
25	Watton	Norwich Road Industrial Estate	GEA	11.2	18	
13	Swaffham	Land North of Eco-Tech Emp Area	GEA	3.1	17	
14		Land West of Eco-Tech Emp Area	GEA	5.9	17	
26	Watton	Part of RAf Technical Site	GEA	2.2	17	
28	Other Areas: Weeting	Mundford Road	GEA	23.5	17	
4	Attleborough	Saved Employment Allocation	GEA	4.0	16	
35	Other Areas: Rural	Roudham/Harling Rd Ind' Area	GEA	14.5	16	
1	Attleborough	Bunns Bank Industrial Estate	GEA	12.4	15	
2		Gaymer Industrial Estate	GEA	11.4	15	
30	Other Areas: Rural	Heath Road, Banham	Non GEA	1.4	15	
33		Church Road, Griston	Non GEA	1.4	15	
36		Shipdham Airfield Ind' Estate	GEA	22.2	15	
20	Thetford	Caxton Way	GEA	7.1	14	

Site Ref'	Location	Site Name	Site Status	Area (ha)	SCORE (/30)	RANK
32	Other Areas: Rural	Rookery Business Pk, Bethorpe	Non GEA	7.0	13	Poor
24	Watton	Griston Road Industrial Estate	GEA	4.3	13	
8	Dereham	Rashes Green Industrial Estate	GEA	3.2	13	
34	Other Areas: Rural	Camp Farm, Roudham Rd, Roudham	Non GEA	7.0	11	
31	Other Areas: Rural	Dereham Road, Beeston	Non GEA	5.0	10	
29	Other Areas: Weeting	Fengate Drove	Non GEA	9.9	10	
Total				478		

6.0 Future Requirements for B Class Employment Space

6.1 This section considers future economic growth needs in Breckland drawing on a number of scenarios for the local authority. These scenarios are used to inform the analysis of the potential economic growth drivers within the District and the employment land and planning policy implications that flow from these.

Approach

6.2 The NPPF requires local authorities to, “set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth” (para 21). In evidence base terms, this should be underpinned by, “a clear understanding of business needs within the economic markets operating in and across their area” (para 160).

6.3 In this context, a number of potential future economic scenarios have been developed through this study to provide a framework for considering future economic growth needs and B Class employment space requirements in Breckland over the period to 2031. These scenarios draw on:

- a projections of employment growth in the main B class sectors (**labour demand**) derived from economic forecasts produced by the East of England Forecasting Model (EEFM) as supplied by BC;
- b consideration of **past trends in completions of employment space** based on monitoring data supplied by Breckland Council, and how these might change in the future;
- c estimating future growth of **local labour supply** based on a demographic housing scenario contained in the recently updated Strategic Housing Market Assessment (SHMA) (699 dwellings per annum) and the amount of jobs and employment space that this can support.

6.4 In addition, a ‘policy on’ scenario has also been considered to reflect a situation which takes account of planned investment and intelligence about future sector/site potential as the basis for modelling an uplift factor applied to the growth rates for individual sectors by 2031.

6.5 All these approaches have some limitations and careful thought needs to be given as to how appropriate each is to circumstances in Breckland. In addition, to be robust, the economic growth potential and likely demand for employment space in Breckland needs to be assessed under different future scenarios, to reflect lower or higher economic growth conditions arising in future.

6.6 It should also be noted that the assessment is not purely quantitative, and that there may be qualitative factors that influence the future employment space requirements that need to be planned for.

a. EEFM Forecasts of Job Growth

- 6.7 Latest forecasts of job growth for Breckland for the period up to 2031 were sourced from the East of England Forecasting Model (EEFM), developed to project economic, demographic and housing trends in a consistent fashion across the East of England region and sub-regions. It should be emphasised that such forecasts tend to be most reliable at national and regional scales and consequently less so at the local economy level, but they are widely recognised as a valuable input and can indicate the broad scale and direction of economic growth in different sectors to help assess future employment space requirements.

Scenario 1: Baseline Job Growth

- 6.8 The forecasts of job growth by sector used here reflect recent trends and are based on projections at regional level, and how economic sectors in Breckland have fared relative to the region's growth in the past. These forecasts also reflect the current post-recession economic climate, and should be viewed in the context of the significant uncertainty surrounding future economic growth.
- 6.9 This indicates overall growth of 3,960 jobs forecast for the District over the 20 year period (Table 6.2), equivalent to 198 jobs per year. Table 6.1 presents the fastest growing sectors under this scenario alongside those sectors expected to see a decline in employment while Figure 6.1 compares past and future job growth in Breckland by sector in order to understand the pattern of change within key sectors of the District's economy. A full breakdown of baseline job growth by sector (including non B class sectors) is presented in Appendix 8.

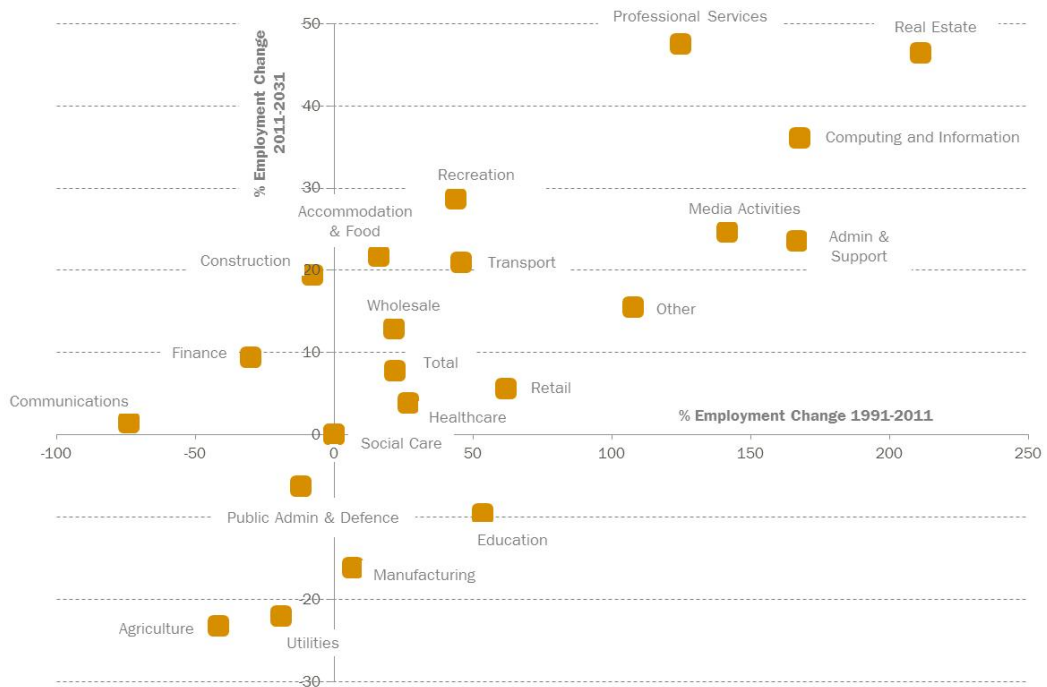
Table 6.1 Fastest growing and declining sectors in Breckland 2011-2031 (Baseline)

Sector	% Change 2011-2031	Additional Jobs 2011-2031
Professional services	47.5	2,070
Real estate	46.4	290
Computing and information services	36.1	85
Recreation	28.6	390
Media activities	24.6	30
Admin and support service	23.6	210
Accommodation and food services	21.7	560
Education	-9.7	-390
Manufacturing	-16.2	-1,280
Utilities	-22.1	-110
Agriculture, Forestry & Fishing	-23.3	-550

Source: EEFM/NLP analysis, 2013 - total jobs including self-employed

Key: **B Class**; **Part B Class**; Non B Class

Figure 6.1 Employment Growth in Breckland (1991 to 2011 and 2011 to 2031) (Baseline)



Source: EEFM / NLP analysis,

6.10 As shown above, the professional services, real estate, IT and recreation sectors are expected to drive the majority of employment growth in the District over the next 20 years, although this growth is forecast to occur at a lower rate than these sectors have recorded over the last 20 years (1991 to 2011). For example, while the professional services sector is expected to see job growth of 47.5% over the 20 year period 2011-2031, this growth rate is less than half that recorded by the sector over the 20 years 1991-2011 (124.9%).

6.11 This trend is echoed across the District’s wider economy, with the baseline scenario implying total annual job growth (198) which is less than half the level of job growth achieved in the District in the recent past (460 jobs per annum between 1991 and 2011). This points to a significant slowing down of the economy in employment terms under the baseline scenario.

6.12 The overall employment change in Breckland resulting from these EEFM forecasts is shown in Table 6.2 along with expected job growth in the main B class sectors. This includes an allowance for jobs in other non B class sectors that typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport and cargo handling and some public administration activities (see Appendix 7). A detailed breakdown of the baseline EEFM forecast by sector is included at Appendix 8.

Table 6.2 Forecast Employment Change in Breckland 2011-2031

	No of Jobs		Change
	2011	2031	2011-2031
Manufacturing (B1c/B2)*	9,900	8,810	-1,090
Distribution (B8)**	4,900	5,720	820
Offices (B1a/b)***	6,170	8,700	2,530
Total B-class Jobs	20,970	23,230	2,260
Jobs in All Sectors	50,720	54,680	3,960

Source: EEFM / NLP analysis, 2013 - total jobs including self-employed

Totals rounded

* includes vehicle repair and some construction activities ** includes parts of transport & communications sectors that use industrial land *** includes publishing and a proportion of government offices

- 6.13 These indicate relatively low overall net job gains (2,260 jobs) in the B-use classes in Breckland over the period to 2031, with strong growth in office-based activities and minor gains in distribution jobs offset by a moderate decline in manufacturing employment. This is within the context of overall job growth of 3,960 jobs predicted for the District over the period, which outside the B Class sectors will mainly be in the construction, transport and hospitality sectors.
- 6.14 These job forecasts can then be converted to future employment space requirements assuming typical ratios of jobs to floorspace for the different B uses. To estimate space needs, the following average ratios have been applied:
- **Offices:** 1 job per 10.5 sq.m
 - **Industry:** 1 job per 43 sq.m
 - **Warehousing:** 1 job per 65 sq.m for small scale warehousing (estimated to account for approximately 90% of new warehousing space in Breckland) and 1 job per 74 sq.m for larger scale warehousing (accounting for 10% of new warehousing space)
- 6.15 These assumptions are based on the latest HCA/Offpat guidance on employment densities published in 2010.¹⁶ This guidance takes account of recent trends in terms of the changing use of employment space, the main change being the more efficient utilisation of office space due to increased flexible working and hot desking. This has resulted in a decrease in the amount of floorspace per office worker that is assumed compared to earlier guidance.
- 6.16 An allowance of 10% is added to all floorspace requirements to reflect a normal level of market vacancy in employment space. Where a reduction in jobs is forecast, the associated negative floorspace was halved, to reflect the fact that not all of this employment space is likely to be lost.

¹⁶ Based on HCA/Offpat Employment Densities Guide, 2010

Table 6.3 EEFM Job Growth based Employment Space Requirements in Breckland, 2011-2031

	Floorspace (sq.m)
Manufacturing (B1c/B2)	-23,470
Distribution (B8)	59,165
Offices (B1a/b)	29,270
Total	64,970

Source: NLP analysis

- 6.17 This forecast net increase of 2,260 B Class jobs over a 20-year period (to 2031) which underpins this estimate of future employment space needs, is equivalent to an average of 113 additional jobs respectively each year. This is significantly lower than the long term job growth achieved in Breckland over the 20 period 1991-2011 when EEFM data indicates that B class jobs in the District increased by approximately 223 jobs per annum. On the basis of past performance, the above employment space forecasts could be regarded as a less optimistic estimate.

Scenario 2: Alternative 'Policy On'

- 6.18 An alternative 'policy on' scenario has been developed which specifically factors in key policy priorities, regeneration and investment opportunities for the District as identified by the Council and the emerging Local Plan. Discussions were held with Council officers to identify a number of sectors (outlined in Table 6.4) which are considered to have the potential to outperform the level of employment growth implied by the baseline scenario. This includes major infrastructure improvements through the dualling of the A11 from Thetford to Fiveways which is expected to deliver significant economic benefits to the District through enhancing Breckland's credentials as a business location. A number of retail and office-led development schemes are also factored into the alternative 'policy-on' scenario on the basis that they would cumulatively deliver a level of job growth that is significantly higher than that implied by the baseline EEFM forecast.

Table 6.4 Identified Sectors

Sector	Rationale for Change
Manufacturing, wholesale and transport	<ul style="list-style-type: none"> • Opportunities associated with dualling of the A11 from Thetford to the Fiveways roundabout; improved transport accessibility and strategic connections providing scope to attract and retain enhanced levels of industrial activity • Supported by feedback from local property market agents that A11 improvements will have positive implications for the development potential of employment land near to the A11
Food manufacturing	<ul style="list-style-type: none"> • Opportunities for further food manufacturing employment growth through potential proposals for a large manufacturer to occupy the ex-Tulip site in Thetford, bringing circa 200 manufacturing/food science industry jobs to the town • The policy-on scenario assumes that negative employment growth in the food manufacturing implied by the baseline scenario is reduced by around 200 jobs

Sector	Rationale for Change
Retail	<ul style="list-style-type: none"> A number of proposed retail-led schemes are anticipated to increase retail employment growth in the District over and above the baseline The policy-on scenario assumes that an additional 500 retail jobs could be generated within the District over and above the baseline scenario
Hospitality	<ul style="list-style-type: none"> Opportunities for further accommodation and food services employment growth through potential proposals for a mixed-use development on the Gaymers site in Attleborough and old Cemex site in Dereham The policy-on scenario assumes that an additional 250 hospitality jobs could be generated within the District over and above the baseline scenario
Office based sectors	<ul style="list-style-type: none"> Potential proposals for a mixed-use development on the Gaymers site in Attleborough include office uses, whereby increasing office based employment growth in the town The policy-on scenario assumes that an additional 50 office based jobs could be generated within the District over and above the baseline scenario
Energy/utilities	<ul style="list-style-type: none"> Opportunities for further energy and utility employment growth through potential proposals for a Biomsss plant in Snetterton The policy-on scenario assumes that circa 20 utility jobs could be generated within the District over and above the baseline scenario

6.19

As shown in Table 6.5 below, these sector specific adjustments equate to an additional 2,210 jobs (111 jobs per year) above the baseline scenario by 2031 (6,170 total of by 2031), representing an increase of 56% over and above the level of employment growth implied by the baseline scenario. 3,620 (59%) of these additional jobs relate to B class sectors.

Table 6.5 Forecast Employment Change in Breckland 2011-2031 (Policy-On Alternative Scenario)

	No of Jobs		Change
	2011	2031	2011-2031
Manufacturing (B1c/B2)*	9,900	9,710	-190
Distribution (B8)**	4,900	6,130	1,230
Offices (B1a/b)***	6,170	8,750	2,580
Total B-class Jobs	20,970	24,590	3,620
Jobs in All Sectors	50,720	56,890	6,170

Source: Source: EEFM / NLP analysis, 2013 - total jobs including self-employed

Totals rounded

* includes vehicle repair and some construction activities ** includes parts of transport & communications sectors that use industrial land *** includes publishing and a proportion of government offices

6.20

The floorspace requirements associated with this alternative 'policy-on' job growth scenario are presented in Table 6.6 below, and indicate a demand for 84,760 sq.m of industrial space and 29,850 sq.m of office space over the 20 year period 2011 to 2031.

Table 6.6 EEFM Job Growth based Employment Space Requirements in Breckland, 2011-2031 ('Policy-On')

	Floorspace (sq.m)
Manufacturing (B1c/B2)	-4,030
Distribution (B8)	88,790
Offices (B1a/b)	29,850
Total	114,610

Source: NLP analysis

b. Past Development Rates

- 6.21 Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a reasonable basis for informing future land needs, particularly where land supply or demand has not been unduly constrained historically. However, the future demand picture may not reflect past trends and some adjustments may be needed.

Scenario 3: Past Development Rates

- 6.22 Data on past completions by B class sector was provided by Breckland Council. Completions in the period 2004 to 2012 have been analysed, since this is a reasonably long period that reflects a full business cycle with periods of both economic growth and recession. Over this period, average annual net completions for B Class uses amounted to some 12,030 sq.m, broken down as shown in Table 6.7. The vast majority (82%) of net completions were for industrial space, with the remaining 18% for offices. Gross completions were slightly higher, at an average of 14,560 sq.m annually, but this masks some losses of employment space in development schemes.

Table 6.7 Annual Net Completion Rates in Breckland, 2004-2012

Sector (Use Class)	Net annual completion (sq.m)	Gross annual completion (sq.m)
Industrial (B1c/B2/B8)	9,915	7,720
Office space (B1a/b)	2,115	1,150
All	12,030	14,560*

Source: Breckland Council

* Gross annual completion rate also includes 5,690 sq.m 'unknown B1/B2/B8' space

- 6.23 One view of future growth in Breckland could simply assume that future development rates carry on at the long term average achieved in the past. If it were assumed that the past net completion rates noted above continued in the 20 years between 2011-2031, it would equate to a need for 42,300 sq.m of office space, and 198,300 sq.m of industrial space. In total, this would indicate demand for approximately 240,600 sq.m of employment space by 2031, a figure significantly higher than that estimated using job forecast scenarios (Tables 6.3 and 6.6).

Table 6.8 Employment Space Requirement based on Past Trends Continuing, 2011-2031

Sector (Use Class)	Assumed annual completion rate (sq.m)	Floorspace Required (sq.m)*
Industrial (B1c/B2/B8)	9,915	198,300
Office space (B1a/b)	2,115	42,300
All	12,030	240,600

Source: NLP analysis * totals rounded

- 6.24 Using typical ratios of jobs to floorspace for the different B uses (as outlined above), it is possible to estimate that this additional floorspace requirement could accommodate 7,500 B class jobs over the 20 year period 2011 to 2031, equivalent to 375 additional B class jobs per year.
- 6.25 This approach assumes that past trends of office development in both a relatively buoyant as well as recessionary economic period would continue unchanged, but may not fully reflect the impacts of the current economic downturn or longer term workplace trends that could reduce future demand for office space. Conversely, it may underestimate future demand if the supply was constrained in the past, for example because of poor sites available or infrastructure/funding factors.

c. Future Labour Supply

- 6.26 It is also important to consider how many jobs, and hence how much employment space, would be needed to broadly match forecast growth of the District's resident workforce. In contrast to the two preceding approaches, this forecasts the supply of labour rather than labour demand. It then indicates the amount of new jobs needed to take-up this future supply of workers and minimise local unemployment, and how much employment space would be needed to accommodate these jobs.

Scenario 3: Labour supply (2011 SNPP equivalent to 699 dwellings p.a.)

- 6.27 The Breckland Demographic Projections Technical Report¹⁷ identifies a range of scenarios relating to objectively assessed housing need and demand for the plan period 2011 to 2031. The demographic Scenario B – 2011 Sub-National Population Projections (SNPP) - uses the latest official ONS population projections to estimate a requirement for an additional 13,974 dwellings in the District to 2031, equivalent to 699 per annum.
- 6.28 The labour supply implications of this scenario have also been modelled by the Technical Report to take account of economic activity rates and future pension age changes outlined in current national policy. This provides an approximation of the number of people likely to be seeking work within Breckland as it allows

¹⁷ Demographic Projections Technical Report, Nathaniel Lichfield & Partners, September 2013

for a proportion of the resident population commuting to jobs elsewhere and for some in-commuting.

- 6.29 The workplace labour supply forecasts indicate an increase of 4,059 workers in the District by 2031 (Table 6.9). From these forecasts, the number of B Class jobs required was estimated assuming one additional job would be required for each additional worker forecast and based on the forecast proportion of B Class jobs within total jobs in Breckland in 2031.¹⁸

Table 6.9 Forecast Labour Supply/Job Requirement in Breckland to 2031

	Average per year (2011-2031)	Change 2011-2031
Dwellings	699	13,974
Resident labour supply	215	4,309
Workplace labour supply	203	4,059
B-class job requirement	86	1,725

Source: Breckland Council / NLP analysis

- 6.30 The resulting job numbers were then translated into estimated requirements for B class employment floorspace by applying the same standard employment densities used in the job growth based approach and adding a 10% vacancy allowance. The floorspace estimates for manufacturing and warehousing space were combined since these two sectors typically occupy the same types of sites at similar development densities.

- 6.31 Overall, future employment space requirements based on meeting the job needs of local residents would mean approximately 69,160 sq.m B class employment space being required by 2031 (Table 6.10).

Table 6.10 B Class Floorspace Required from Labour Supply Growth

Use	Floorspace (sq.m) 2011-2031
Industrial (B1c/B2/B8)	61,700
Offices (B1a/b)	7,460
Total	69,160

Source: NLP analysis

- 6.32 This labour supply based estimate provides a useful benchmark for comparison with labour demand approaches. Based on 699 net additional dwellings p.a., this forecast produces a floorspace requirement that sits between the job growth and past take-up scenarios.

- 6.33 One potential drawback of this approach is that no change is assumed over time in the proportion of future jobs made up by office-based employment, which might be expected to increase in future (given recent trends in the District – Figure 2.2). This might underestimate future office space requirements and overestimate industrial space needs.

¹⁸ Source: EEFM employment forecasts, 2013

6.34 Furthermore, this scenario may also underestimate the level of in-commuting to the District over the next 20 years which could further increase the supply of labour available to fill jobs in Breckland. In-commuters currently¹⁹ account for just over 20% of Breckland's local workforce, equivalent to just under 10,000 workers. At 1,725 (or 86 per annum), the additional B class job requirement associated with the labour supply based approach is the lowest of all four scenarios considered by this study, and falls significantly behind the level of overall and B class job growth achieved in Breckland in recent years (223 additional B class jobs were recorded per annum between 1991 and 2011). On this basis, the labour supply derived requirement potentially underestimates Breckland's future economic potential and does not appear to be an approach conducive to planning positively for growth.

Net Employment Space Requirements

6.35 Drawing together the results from these different approaches and growth scenarios, Table 6.11 summarises the net floorspace requirement up to 2031 arising from each.

Table 6.11 Net Floorspace Requirement to 2031 for Different Growth Scenarios

Use	Labour Demand		Past Development Rates	Labour Supply
	1. Job Growth (Baseline)	2. Job Growth ('Policy-On')	3. Past Take-up	4. Labour Supply (699 dw.p.a)
Industrial (B1c/B2/B8)	35,695	84,760	198,300	61,700
Offices (B1a/b)	28,960	29,850	42,300	7,460
All B uses	64,660	114,610	240,600	69,160

Source: NLP analysis

6.36 These forecasts reflect a fairly wide range of potential space requirements. For industrial space, this would be between 35,695 sq.m (based on baseline job growth) and 198,300 sq.m (past take-up) up to 2031. For office space, the range is narrower, between 7,460 sq.m (based on labour supply) and 42,300 sq.m (based on past take-up).

Safety Margin

6.37 To estimate the overall requirement of employment space that should be planned for in allocating sites, and to give some flexibility of provision, it is normal to add an allowance as a safety margin for factors such as delays in some sites coming forward for development.

6.38 In a location like Breckland where land supply is relatively unconstrained and development pressure from other uses is limited, there is a need to ensure a reasonable but not over-generous additional allowance that provides for some

¹⁹ Based on 2001 Census data (the latest available at the time of writing)

flexibility but avoids over-provision of land. However, it also needs to reflect that there may be potential delays in some of the District's development sites coming forward for development.

- 6.39 The SEEPB guidance on employment land assessments recommends an allowance that is equivalent to the average time for a site to gain planning permission and be developed, typically about two years. For Breckland, the margins set out in Table 6.12 were added for B Class use based on two years of average net take-up which appears an appropriate level relative to the estimated scale of the original requirement and taking account of the nature of the land supply in the District.

Table 6.12 Safety Margin Allowances

Use	Average Annual Take-up (sq.m)	Safety Margin Added (sq.m)
Industrial (B1c/B2/B8)	9,915	19,830
Offices (B1a/b)	2,115	4,230

Source: NLP analysis

Convert to Gross Floorspace Requirements

- 6.40 To convert the net requirement of employment space into a gross requirement (the amount of employment space or land to be allocated/planned for), an allowance is also typically made for some replacement of losses of existing employment space that may be developed for other, non B Class uses.
- 6.41 Judgements were made on the suitability and degree of the allowance for future losses which it would be appropriate to apply here based on analysis of supply-side deliverability factors and current trends in the market. Although monitoring data on losses of employment space in Breckland is limited and only available as far back as 2007, analysis indicates that the District has been losing an average of approximately 2,280 sq.m of B1-B8 floorspace per year (between 2007 and 2013) to other non B use classes.
- 6.42 An initial review suggests that this has mainly involved the loss of older industrial space on existing industrial estates (as opposed to loss of office space which generally tends to be located in converted residential properties or above retail units in town centres). Although manufacturing employment is forecast to decline in the District over the next 20 years (Table 6.2), market demand for industrial space in Breckland has remained strong, particularly for small scale and localised industrial activities.
- 6.43 Although guidance suggests that not all losses need to be replaced as some will reflect restructuring in the local economy as less manufacturing space is needed in future, it has been assumed that 100% of industrial losses will be replaced each year, equating to 45,520 sq.m. This reflects the fact that the average annual losses figure outlined above covered the last six years (including a prolonged recession and subdued economy) and is therefore likely to be lower than may be expected in future across the District. In a more

buoyant market, it is likely that losses of employment space would increase as the pace of development grows. No allowance is made for replacement of office losses.

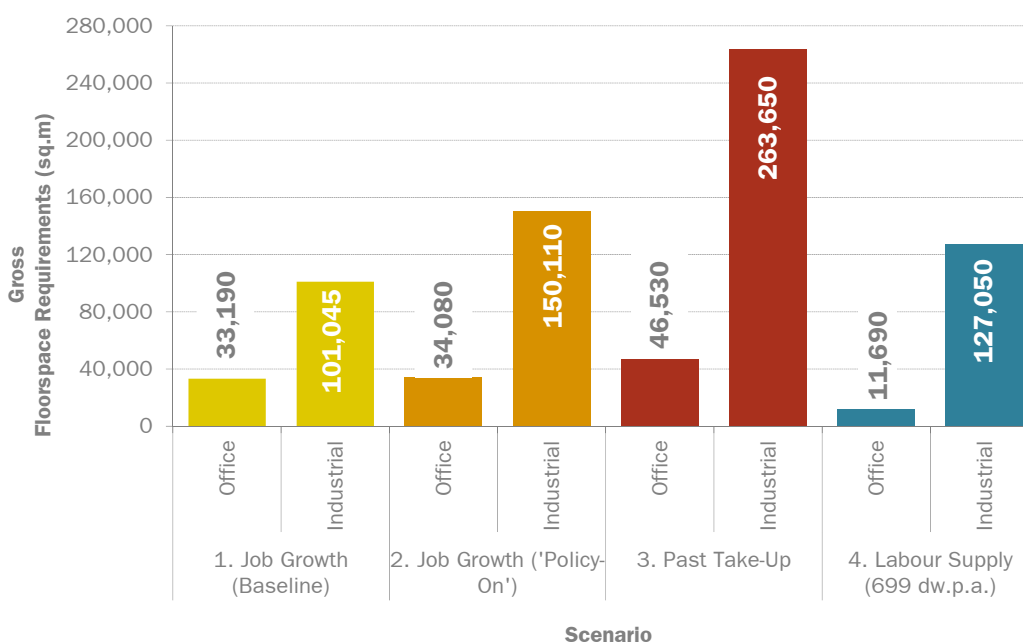
6.44 The resultant gross floorspace requirements incorporating these allowances are set out in Table 6.13 and Figure 6.2.

Table 6.13 Gross Floorspace Requirement by Scenario to 2031 (sq.m)

Use	1. Job Growth (Baseline)	2. Job Growth ('Policy-On')	3. Past Take-up	4. Labour Supply (699 dw.p.a)
Industrial (B1c/B2/B8)	101,045	150,110	263,650	127,050
Offices (B1a/b)	33,190	34,080	46,530	11,690
All B uses	134,235	184,190	310,180	138,740

Source: NLP analysis * totals rounded

Figure 6.2 Gross Floorspace Requirements by Scenario (sq.m)



Source: NLP analysis

Estimate Land Requirement

6.45 The final step, for all scenarios, was to translate floorspace into land requirements for both office and industrial uses. This has been calculated by applying appropriate plot ratio assumptions to the floorspace estimates using the following assumptions and local adjustment factors to reflect the pattern of development in the District:

- **Industrial** – a plot ratio of 0.4 was applied so that a 1 ha site would be needed to accommodate 4,000 sq.m of employment floorspace; and

- **Offices** – it was assumed that 70% of new floorspace would be in lower density, business park developments with a plot ratio of 0.4, with 30% in higher density town centre locations at a plot ratio of 2.0.

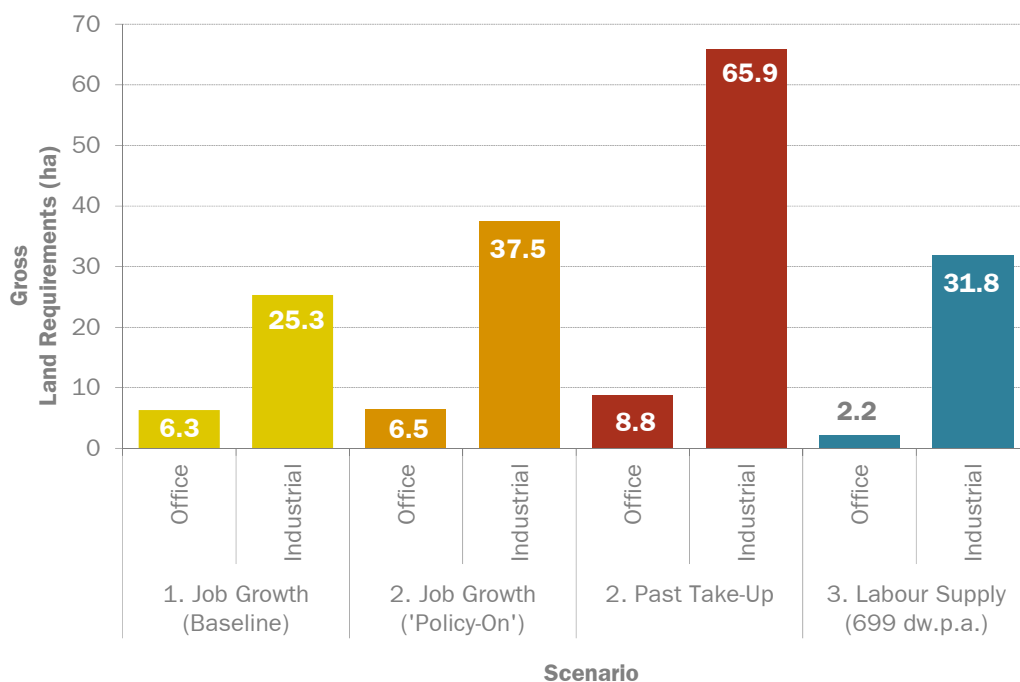
6.46 The resulting land requirements are set out in Table 6.14 and Figure 6.3.

Table 6.14 Gross Land Requirement by Scenario to 2031 (ha)

Use	1. Job Growth (Baseline)	2. Job Growth ('Policy-On')	3. Past Take-up	4. Labour Supply (699 dw.p.a)
Industrial (B1c/B2/B8)	25.3	37.5	65.9	31.8
Offices (B1a/b)	6.3	6.5	8.8	2.2
All B uses	31.6	44.0	74.7	34.0

Source: NLP analysis

Figure 6.3 Gross Land Requirement by Scenario (ha)



Source: NLP analysis

6.47 The range of land requirements for office development land is fairly narrow – between 2.2 and 8.8 ha to 2031, depending on the approach used. For industrial land, the range is slightly wider, between 25.3 and 65.9 ha to 2031.

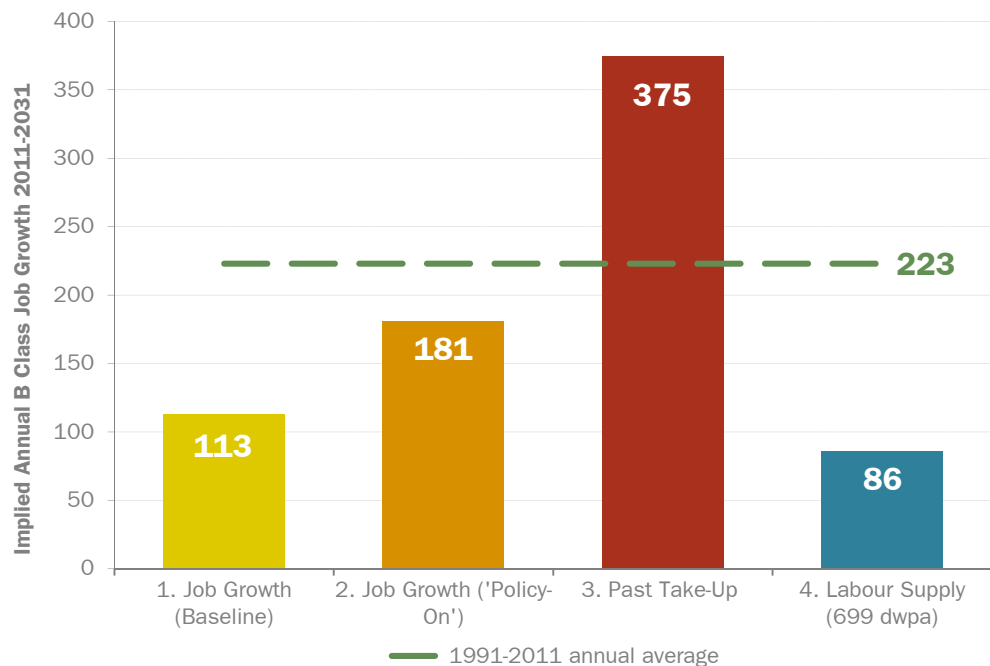
Sensitivity Tests

6.48 Given the range of potential requirements implied by these different estimates of future requirements, it is important to test how reasonable each appears against other factors and how sensitive they are to different assumptions.

6.49

It is useful to first compare the employment growth implied by these amounts of land with employment growth actually achieved in Breckland in recent years (Figure 6.4). The lowest estimate based on labour supply (699 dwellings per annum) implies an additional 86 B class jobs annually over the next 20 years, mostly industrial jobs. The highest growth estimate based on past take-up implies some 375 additional B class jobs annually, again largely comprising industrial jobs. These figures compare with an average growth of 223 B class jobs in Breckland per year between 1991 and 2011, a period which includes the recent recession. The alternative 'policy-on' job growth scenario lies closest to this past employment growth trend.

Figure 6.4 Annual B Class Job Growth Implied by Scenarios



Source: EEFM / NLP analysis

Note: Estimated job levels for each scenario do not take account of additional floorspace allowance in the safety margin, which is identified for planning purposes and may not actually be developed

6.50

This indicates that three of the four scenarios could generate a lower level of job creation than has been achieved in the District in the recent past. As that period was one of relatively strong economic growth, followed by a severe recession with an outlook of fragile recovery, these estimates would appear pessimistic. The past take-up scenario is the only approach that generates higher level of B class job growth than recent trends in the District, however this scenario assumes a relatively high job density ratios for office uses in Breckland over the Plan period, which may not truly reflect the nature of office use in the District and therefore may overestimate the level of job growth that is likely to occur in these sectors.

6.51

Other assumptions which can make a significant difference to the forecasts of future requirements include the allowance for replacement of future losses. With no allowance for future losses, the lowest estimate of future industrial space needs would reduce by 55% to 55,525 sq.m.

Conclusions

- 6.52 Four different scenarios of future employment space requirements have been considered, based on a number of approaches which reflect economic growth, past development trends and potential housing supply factors. The majority of these reflect assumptions of lower future economic growth in Breckland than the District has achieved in the recent past.
- 6.53 The overall space requirements related to these different scenarios range from 134,235 sq.m to 310,180 sq.m of all types of employment space to 2031, implying in broad terms a need for between 31.6 ha and 74.7 ha of employment land. The majority of this spatial requirement relates to industrial (B1c/B2/B8) uses.
- 6.54 Given an uncertain economic outlook, it is difficult to select the most likely option from these alternative growth pictures and all four scenarios have been tested against the District's supply position (Section 7.0).
- 6.55 While all scenarios of future growth imply a limited requirement for additional office space by 2031 (reflecting the relatively small scale nature of Breckland's office market generally), employment growth is expected to be driven in part by a number of office based sectors including professional services, and the Council should consider planning to accommodate at least the baseline job growth requirement (33,190 sq.m) whilst providing capacity within the District to meet the slightly higher alternative 'policy-on' requirement (34,080 sq.m).
- 6.56 Similarly with regards to industrial space, it is recommended that the District's local plan includes scope to accommodate at least the baseline job growth requirement (101,045 sq.m) as a minimum, but actively plan to accommodate the higher requirement of 150,110 sq.m based on the alternative 'policy-on' scenario of future growth. Industrial based industries are expected to drive a significant proportion of Breckland's economic growth over the plan period, building on the District's existing strengths in this sector, and it is important that this potential is not constrained by a lack of space to accommodate this growth.

7.0 Demand/Supply Balance

7.1 This section draws together the forecasts of future employment land needs in Section 6.0 and the estimates of land available on the area's existing and allocated employment sites in Section 3.0 to identify any need for more provision of employment space, or surpluses of it, in both quantitative and qualitative terms.

Quantitative Balance

7.2 The previous section identified a need for between 134,235 sq.m and 310,180 sq.m of employment space up to 2031, including a modest safety margin largely to allow for delays in sites coming forward for development. The land requirements associated with these amounts of employment floorspace were estimated at between 31.6 ha and 74.7 ha.

Pipeline Supply

7.3 As detailed in Section 3.0, the pipeline supply of employment space in the District comprises sites allocated for employment development (that remain undeveloped) and other sites with extant planning permission for B class space.

7.4 From these sources, the floorspace available to help meet future needs in Breckland is estimated to comprise just over 116ha in net terms as shown in Table 7.1. Three quarters of identified supply (75%) comprises undeveloped allocations sites, with the remaining 25% representing extant planning permissions. The majority (77%) of the 116ha relates to flexible B class space (B1/B2/B8), with the remaining 23% split relatively evenly between office (B1), factory (B2) and distribution (B8) space.

Table 7.1 Available Employment Space in Breckland

	New Employment Space					
	ha/ sq.m	B1	B2	B8	B1/B2/B8 Split Unknown	Total
Extant Allocations	ha	0	0	0	87.6	87.6ha
Extant Planning Permissions	ha	8.81	9.14	8.89	1.94	28.78ha
	sq.m	2,860	11,160	2,322	6,036	22,378sq.m
Total	ha	8.81	9.14	8.89	89.54	116.38ha

Source: Breckland Council Annual Monitoring Report 2012

7.5 Although this pipeline supply is distributed across Breckland, the majority of sites are concentrated within the larger town of Thetford, including the Thetford Urban Extension allocation and Thetford Enterprise Park.

- 7.6 Beyond the supply outlined above, the survey of sites in Section 5.0 identified very limited undeveloped land on existing sites to accommodate new development. Furthermore, as reported in Section 4.0, current levels of vacant employment space being marketed do not appear excessive against the 'normal' market vacancy rate of 10% to enable churn and choice. Therefore, existing employment sites have been excluded from the following analysis of current/available supply, and no surplus capacity in terms of existing vacant floorspace has been added to the supply position.
- 7.7 A broad comparison of estimated demand for B Class space against all currently identified supply, as shown in Table 7.2, implies that Breckland would have sufficient employment space in quantitative terms up to 2031 to meet the needs arising from all four scenarios of future requirements. The potential surplus of space would vary from 41.7ha under the past take-up scenario to 84.8ha of employment space under the baseline job growth scenario.

Table 7.2 Demand/Supply of B Class Employment Space in Breckland (to 2031)

	1. Job Growth (Baseline)	2. Job Growth ('Policy-On')	3. Past Take-up	4. Labour Supply (699 dw.p.a)
Requirement for B Class Space (ha)	31.6	44.0	74.7	34.0
Available Employment Space (ha)	116.4			
Surplus (+)/Shortfall (-) (ha)	+84.8	+72.4	+41.7	+82.4

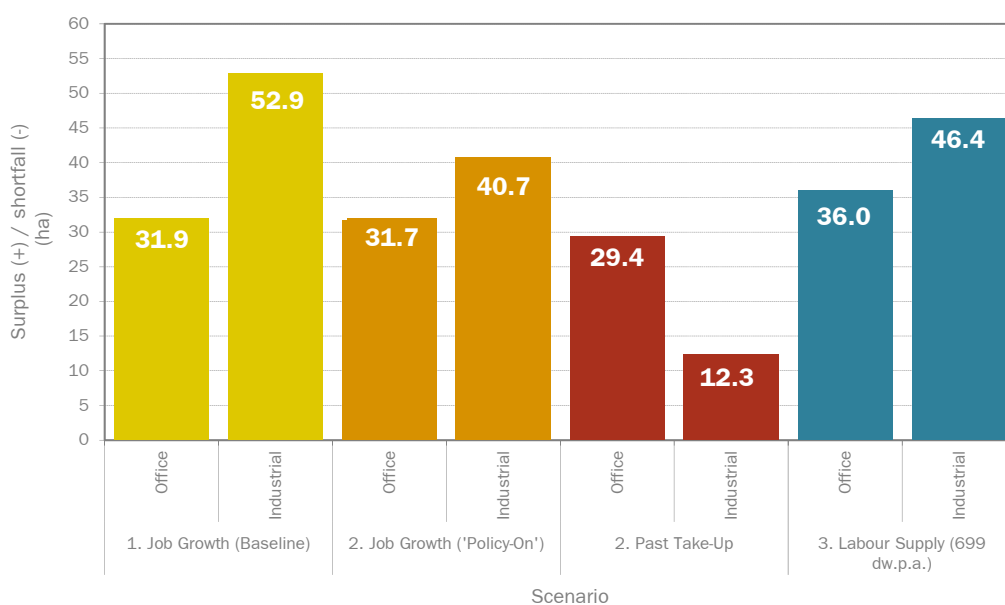
Needs of Different Employment Uses

- 7.8 Ensuring an adequate choice of types of sites is also important to meet the needs of different employment sectors and the aims for diversity of employment opportunities at different skill levels. Potential supply of employment space for both industrial and office uses was therefore compared with estimated requirements for these uses.
- 7.9 Table 7.3 and Figure 7.1 compare the demand and supply situations for industrial and offices uses separately. This indicates that there should be more than enough supply available, in purely quantitative terms, to meet both industrial and office needs arising under all four demand estimates. For industrial space, the surplus ranges from 12.3 ha (past take-up) to 52.9 ha (baseline job growth) while for office space the range is slightly narrower, between 29.4 ha (past take-up) and 36.0ha (labour supply).
- 7.10 This predicted shortfall assumes that all employment allocations that remain undeveloped and outstanding planning permissions (at March 2012) come forward in full for employment development over the plan period. Any deviation from this assumption could reduce the existing surplus of employment space, or potentially result in a deficit depending upon the scale of deviation.

Table 7.3 Demand/Supply for office and industrial space to 2031 (ha)

	1. Job Growth (Baseline)	2. Job Growth ('Policy-On')	3. Past Take-up	4. Labour Supply (699 dw.p.a)
Industrial				
Industrial space requirement	25.3	37.5	65.9	31.8
Potential supply of industrial space	78.2			
Surplus(+)/Shortfall(-)	+52.9	+40.7	+12.3	+46.4
Offices				
Office space requirement	6.3	6.5	8.8	2.2
Potential supply of office space	38.2			
Surplus(+)/Shortfall(-)	+31.9	+31.7	+29.4	+36.0

Figure 7.1 Forecast surplus of office and industrial space to 2031 by scenario



Source: NLP analysis

7.11 This suggests that the identified pipeline supply as it stands provides for sufficient industrial and office space to meet the District’s employment development needs to 2031 in purely quantitative terms.

Qualitative Factors

7.12 Even where no quantitative shortfall of space is identified, in some circumstances additional land may be needed for qualitative reasons, for example to:

- improve the choice of provision for occupiers;

- meet gaps in the supply of particular types of premises;
- improve or modernise the quality of current provision and so help attract more occupiers; or
- provide a better spatial distribution of employment sites to meet the needs of different settlements.

7.13 Qualitative needs are considered for each broad property type/area individually.

Industrial

7.14 Breckland is perceived as a relatively strong industrial location (particularly for smaller scale, localised activities), and continues to see steady demand for industrial space. However, some of the stock is dated and/or poorly specified. Although this may satisfy certain local requirements for affordable business space to a certain extent, such accommodation is considered to have very limited market appeal. Local property market feedback suggests that this has constrained industrial activity in the District for some time with anecdotal reports of firms moving out of Breckland to better suited accommodation elsewhere. Relatively low levels of vacancy reflect a limited supply of good quality, modern industrial space and a relatively tight industrial market in general.

7.15 Furthermore, a number of the District's existing industrial estates suffer from constraints associated with their proximity to other less suitable uses such as residential (e.g. Rashes Green Industrial Estate in Dereham). This constraint in some cases has reportedly prevented deals from completing due to occupier concerns and potentially undermines the future role of these sites for continued employment use.

7.16 From a demand perspective, the severity of the recession, alongside relatively low rental values and the secondary nature of Breckland as an industrial location (particularly compared with other larger centres nearby) have resulted in very little interest from developers or investors to develop new space or refurbish existing stock. Local agents are doubtful that there would ever be sufficient demand from industrial firms to justify any significant additional allocations of land for employment use.

Offices

7.17 The office market across Breckland is relatively small in scale and inactive in the current climate. Very limited demand for office accommodation is reflected in low rental values and incentives are usually needed to attract prospective occupiers. The vast majority of the District's office stock is dated and is in converted residential properties or space above retail units.

7.18 Nevertheless, none of the towns have much vacant stock and local agents report that a couple of recent small scale business centre schemes (such as the Keystone Innovation Centre in Thetford) providing small, flexible office suites to local SMEs have proved successful in recent years (although requiring

public sector financial support to remain viable). Meanwhile, local property agents expressed doubts that there would ever be sufficient demand from office users to justify retaining remaining undeveloped employment allocations (for example at the Ecotech Business Park in Swaffham). This suggests that any new provision of office space in Breckland should be focused upon small scale, good quality modern accommodation, similar to an enterprise centre model that appears to meet market demand in the District. Similarly, it will be important to ensure that there is sufficient move on space for these firms as they expand and require larger premises, in order to retain this activity within the District.

Settlement Distribution

- 7.19 Whilst a key aim of this Employment Growth Study is to estimate gross employment land requirements for the District overall, it is also important to ensure the appropriate distribution of allocated sites across the District to meet future requirements, and to accord with market demand. As such, this section provides an overview of market views on demand for different uses, locations of stronger/weaker demand across Breckland and seeks to identify where any gaps in future provision may exist.
- 7.20 A summary of the anticipated demand/supply situation over the plan period for the District's main settlement areas (as defined by the settlement hierarchy) is presented in Table 7.4 with a summary by settlement area provided below. This analysis has been undertaken within the context of an identified gross requirement of between 31.6 ha and 74.7 ha and a quantitative over supply of employment land over the 20 year time period 2011-2031.

Table 7.4 Comparison of Employment Land Supply and Demand to 2031 by Settlement

Location / Settlement	Existing Employment Land Supply (ha)	Gross Past Take-Up (2007-2013) sq.m	Share of District's Employment Space (VOA)	Reported Level of Market Demand	Demand / Supply Balance to 2031
Attleborough and Snetterton	18.0 (16%)	36,590	15.4	High	↔
Dereham	13.5 (12%)	3,170	8.9	Moderate	↔
Swaffham	13.4 (12%)	2,640	2.7	Low	↑
Thetford	52.7 (45%)	7,850	35.6	High	↔
Watton	2.4 (2%)	8,010	6.4	Moderate/ Low	↔
Rural/other	16.4 (14%)	20,160	30.9	Moderate/ Low	↑
Total	116.4 (100%)	78,420	100%	Moderate	

KEY ↔ = adequate supply ↑ = over-supply

Note: Proportions of existing supply by location based on analysis of a sample of monitoring data by General Employment Area (GEA) and non GEA

7.21 Located to the south east of Breckland, the settlements of **Attleborough and Snetterton** represent some of the District's strongest market locations for industrial activity due in part to their good access to the A11 strategic route. Snetterton accommodates the District's largest employment site (65ha site at Snetterton South). The majority of pipeline supply comes from undeveloped land on existing employment sites (including Snetterton Heath South and Haverscroft Industrial Estate) as well as Attleborough's 3.9ha saved employment allocation to the west of the town. Whilst the two towns continue to attract demand from local industrial occupiers, the view amongst local property market agents is that existing available supply would be sufficient to meet future demand and business enquiries, with no additional employment land needed.

7.22 **Dereham** has the second largest property market in Breckland and experiences a reasonable level of activity, despite being less well located for distribution purposes compared with other centres adjoining the A11. Due in part to its proximity to Norwich's large office market, local agents doubt whether the town could support a greater provision of office space in future. The majority of Dereham's pipeline supply of employment space comes from the two undeveloped allocations at Rashes Green Industrial Estate and Dereham

Business Park which effectively represent extensions to existing employment sites. Whilst in overall terms agents felt that these allocations were appropriate, there is a concern that the site which is intended to allow for the further expansion of the Rashes Green Industrial Estate will have very limited market appeal in view of the constraints associated with residential uses that surrounding the site. Overall there appears to be an opportunity to rationalise some of Dereham's poorer performing sites such as Rashes Green in order to rebalance the town's supply to more effectively meet the demand from modern business users seeking flexible employment space.

- 7.23 **Swaffham's** commercial property market is relatively small in size and scale, due in part to its relative remoteness and local nature of demand. Nevertheless, the town accommodates just under 9ha of undeveloped allocations at Land North and Land West of Ecotech Business Park, to the north of the town. The Ecotech Business Park site itself also has just over 2ha of available space. Market feedback indicates that even prior to the recession it was difficult to secure tenants to the site, and several units have remained vacant for a considerable length of time. In light of this evidence, it would be difficult to justify retaining the adjacent plots of land in full over the plan period against the backdrop of relatively low levels of demand.
- 7.24 The town of **Thetford** accommodates the majority of commercial property market activity in Breckland, benefiting from its location on the A11 corridor. While demand for employment space is not as strong as prior to the recession, agents commented that currently there is good, steady demand for all types of industrial accommodation in Thetford, and to a lesser extent offices. Although much of the town's existing stock is relatively dated, commercial property values are too low to attract interest from developers or investors to refurbish or (re)develop the town's stock of industrial and office space. Just under half of all of the District's emerging supply of employment space is located in Thetford, with the proposed Sustainable Urban Extension to the north of the town providing 22ha of new employment space alone. It is worth noting that consent has recently been granted for a new 6,000 sq.m food store on a 3ha plot on this site, effectively reducing the amount of B class space available for development. Two saved employment allocations to the north of Fison Way Industrial Estate and to the west of Caxton Way Industrial Estate provide a further 13ha. Whilst on paper this supply appears to be significant at over 50ha in total, these sites perform well as employment locations, while A11 infrastructure improvements are expected to enhance Breckland's (and particularly Thetford's) credentials as a business location, increasing demand for business space in the town more generally. Overall this supply appears to be sufficient in both quantitative and qualitative terms to accommodate Thetford's growth potential over the plan period.
- 7.25 Located in the centre of the District, **Watton** accommodates a reasonable amount of industrial space (with a focus on light industry and engineering) and a steady flow of industrial requirements from local occupiers. The office market is very small in scale, with very limited accommodation for office users. Available supply of employment space comprises just over 2ha made up of

small pockets of undeveloped land and outstanding planning permissions on across the town's existing sites (including at Norwich Road Industrial Estate, Thrextton Road Industrial Estate). This demand/supply balance appears to be relatively well matched, with no identified need for additional employment space in Watton.

- 7.26 **Rural/other settlements** are dispersed across the District and include the smaller settlements of Harling, Riddlesworth and Kilverstone. Employment sites within these more rural areas tend to be stand alone, accommodating single occupier users. Local property market agents receive enquiries from time to time, although these tend to be for specific uses. Much of this space falls outside of the District's main employment centres (GEAs) and is more difficult to proactively plan for. It is estimated that just over 16ha of emerging supply is accommodated across these rural and other locations, including available space on the existing Weeting site in Brandon and Shipdham Airfield to the south of Dereham. There are also a number of outstanding planning permissions for new employment development within these settlements all of which relate less than 1,000 sq.m of flexible B1-B8 development. Whilst these planning permissions relate to specific schemes and users, in light of the requirements for future employment space in the District, it would appear difficult to justify retaining the remaining undeveloped space within the more rural and peripheral areas of the District.

Conclusions

- 7.27 Based on available employment space identified by Council monitoring data, Breckland has sufficient employment floorspace in quantitative terms to meet future needs up to 2031 under all scenarios of future growth.
- 7.28 From a more qualitative perspective, some of the District's stock of industrial and office is dated and/or poorly specified, and considered to have very limited market appeal. Nevertheless, local market feedback indicates that the level of demand may never be sufficient to justify any significant additional allocations of land for employment use. At the same time, a number of sites in Breckland have remained vacant for a considerable time following the closure of a previous occupant, with marketing efforts generating limited interest from new occupiers. Low rental values and the relatively peripheral nature of much of the District have resulted in very little interest from developers and investors to refurbish or (re)develop new space. This would suggest that the District could afford to release some of its poorer performing employment sites to other uses, particularly those that suffer from proximity to unsuitable uses such as residential.
- 7.29 In light of on-going infrastructure improvements to the A11 and proposals for a Sustainable Urban Extension (SUE), Thetford is expected to accommodate a significant proportion of Breckland's growth over the plan period and represents a key location and focus for new employment development over the next 20 years. The identified emerging supply of employment space in the town (at just over 50ha) appears to be sufficient in both quantitative and qualitative terms to

accommodate this growth, although much of this relies upon the successful delivery of the SUE to the north of the town in bringing forward new employment space and a higher level of economic growth coming forward as a result of the A11 improvements.

7.30

In order to ensure the appropriate distribution of employment space across the District in accordance with market demand and within the context of an anticipated surplus of employment space to meet future requirements over the plan period, there is scope to release some of the District's existing sites and undeveloped allocations for other non B class uses, particularly within those areas of Breckland that are characterised by relatively low market demand, such as Swaffham as well as some more rural locations such as Brandon and Shipdham Airfield. This would ensure that the remaining industrial and office stock on the market is of a good quality and remains attractive to occupiers. Removing older stock that is no longer fit for purpose would also help to maintain rental values in the District's key commercial centres which may in future support the viability of refurbishment and redevelopment of employment premises.

8.0 Overall Conclusions and Policy Implications

- 8.1 This section draws together overall conclusions and considers potential policy approaches in relation to employment space for the emerging Local Plan as well as other measures which may be required to support Breckland's economic growth objectives.

Overview of Breckland

- 8.2 Breckland has a relatively successful economy recording significant job growth over the last two decades. The business base is dominated by small and medium-sized businesses but with below average levels of business start-ups and self-employment. However, workforce productivity is relatively low which may in part reflect a slight mismatch in the local economy between lower skilled jobs available, and a more highly qualified resident workforce, many of which commute out of the District to higher paid employment elsewhere.
- 8.3 Breckland's employment space is dominated by industrial uses and tends to be concentrated around Breckland's larger towns. The rural economy also accommodates important hubs of economic activity, particularly with regards to small scale office and workshop space. The District has seen moderate levels of new development over the past eight years, the majority for B1c/B2 manufacturing uses and B8 warehousing.
- 8.4 Demand for employment space remains steady, focused upon small scale industrial accommodation. The majority of commercial property market activity is concentrated within the settlements of Thetford and Dereham, and to a lesser extent Attleborough, with very limited activity occurring outside of these key areas. Some of the District's stock is dated and/or poorly specified with evidence that this issue has been constraining industrial activity – specifically the attraction of new industrial occupiers – in the past.

Policy Implications

- 8.5 The scenarios considered in the previous sections indicate the broad scale and type of growth arising from different approaches to modelling the District's future employment space needs. To varying degrees, they reflect both indigenous needs arising within Breckland as well as – particularly in the case of the scenarios based on past development rates – a degree of footloose demand which operates across the District's boundaries from the wider sub-region. In the context of the NPPF, the Council's policy approach should (particularly in the aftermath of a period of economic recession and the Government's Plan for Growth) aim to at least fully meet Breckland's employment space needs so that the District's economy is not constrained, recognising that developments in adjoining areas will also be a key influence.
- 8.6 However, to ensure a flexible and responsive policy framework, it will be necessary not just to focus on meeting forecast quantitative requirements

(which will fluctuate over time), but to think about the opportunities and risks that flow from particular policies. That might concern how delivery can be prioritised in some locations or for some types of employment uses, or how scope can be created for meeting as yet undefined inward investment opportunities, but also not protecting legacy employment sites for which there is no longer a productive employment use. Planning for employment will need to be balanced against pressures from other land uses, as well as other Local Plan objectives such as planned housing growth. B-class employment space also competes with non B-class uses, some of which may also generate local economic benefits or have identified needs that the NPPF indicates should be supported.

- 8.7 This requires choices in the Local Plan about which sites to protect or allocate for employment development, or which to consider for mixed use development (either in whole or part). That judgement must ultimately take account of:
- the local benefits of B-class sectors and the need to maintain a diversified and resilient economy that is open to growth and new economic opportunities as they arise (as envisaged by the NPPF);
 - the economic and other outcomes (e.g. labour market) if some sectors become displaced or are otherwise constrained from expanding within the District;
 - the need to encourage growth of high quality jobs within the District to address the disparity between resident employee earnings (higher) and workplace earnings (lower);
 - the trade-off between seeking more intensive use of sites and thereby yielding higher net job creation over time, and identified business needs (as specified in the NPPF) which may for some activities or sectors imply a less efficient use of land in order to function effectively; and
 - maintaining a delivery trajectory for employment space with short, medium and longer-term opportunities over the life of the Plan.
- 8.8 The emerging Local Plan should seek to plan for a choice of sites and locations to meet the needs of particular sectors and occupier needs. Some further commentary on the approach and potential options for providing for the different B-class uses are considered below.

Industrial Uses

- 8.9 Breckland continues to represent a reasonably strong industrial location for smaller scale activities, reflecting its proximity to major transport routes (in particular the A11). Despite the economic downturn, demand remains steady for industrial premises in the District mainly for light industrial and small-scale distribution activities. Industrial vacancy rates at 5.5% are currently below the normal market average, while market feedback suggests that this relatively tight property market has started to constrain industrial activity in the District in recent months and years.

- 8.10 In terms of quantitative requirements, the analysis contained in Section 6.0 identifies a modest positive requirement for industrial floorspace under all four scenarios considered, ranging from 134,235 sq.m or 31.6ha under the job growth scenario to 310,180 sq.m or 74.7ha under the past take-up scenario (Tables 6.13 and 6.14). It is recommended that the Council should plan to at least accommodate the requirement for industrial space implied by the job growth based estimate in order to achieve its vision for economic growth.
- 8.11 A comparison with future supply of employment space identified by Council monitoring data indicates that Breckland has sufficient industrial space to meet these needs to 2031 under all scenarios of future growth. Within this context, a number of policy issues emerge for consideration:
- 8.12 In the first instance, the Council could consider rationalising the District's existing and future supply of industrial space by seeking to concentrate this space in the District's key locations and areas of strongest market demand (such as Thetford and Attleborough). Future development of employment space in the District must build upon and take advantage of significant infrastructure improvements associated with the dualling of the A11 from Fiveways to Thetford, and the additional economic opportunities that this enhanced connectivity will bring to Breckland not only by making the District's locations more attractive but also by improving access to the workforce. The proposed SUE of Thetford will also provide a key driver of economic growth within the District over the plan period and the town's best performing employment sites (including Thetford Enterprise Park) should be retained in order to ensure that the District can effectively accommodate this growth in a sustainable way. A selective approach could be taken to condensing the District's portfolio of industrial sites, drawing upon market feedback on which individual sites and locations perform an important role and those which have proved unattractive to the market despite prolonged periods of marketing and/or reflecting other feedback about their constraints. It will be important to safeguard the District's best employment sites, particularly in light of aspirations amongst some landowners for higher value non B class land uses.
- 8.13 In the more peripheral areas of the District where demand levels are weaker, it may be necessary to adopt a flexible approach to bringing forward employment sites by allowing the development of other higher value non-B uses on part of allocated sites, in order to unlock the site's potential and fund any associated infrastructure works. In this respect, the Local Plan should also maintain the flexible characteristics of the District's allocations for a mix of B class uses, whereby enhancing attractiveness to occupiers and promoting the message to investors and developers that Breckland is 'open for business', although the nature of the District's commercial property market indicates that the majority of demand would come from industrial users. The key challenge is to ensure the deliverability of space, identified as a constraint in the past, hence the need to consider how any infrastructure or other barriers can be removed or cross-subsidised.
- 8.14 At the same time, the Council could consider releasing some of the District's poorer quality and poorer performing sites in more peripheral locations and that

suffer from constraints to (re)development (such as proximity to residential uses). Following the departure of a number of key business occupiers, some of the District's industrial sites have remained vacant for a number of years (such as the former Crane Frehauf site in Dereham and Alpha Delta House on Rashes Green Industrial Estate in Dereham) with market feedback indicating limited prospects for (re)development over the longer term.

Office Uses

- 8.15 The office market in Breckland is relatively small and localised, lacking the critical mass to attract and sustain larger office occupiers, particularly in light of strong competition from nearby established larger centres such as Norwich. Much of Thetford's office stock is dated and is in converted residential properties or space above retail units that fails to appeal to modern business users.
- 8.16 The District is expected to see reasonably strong office job growth over the next 20 years (reflecting wider macro-economic trends) and the sector is anticipated to have an increasingly important role to play in Breckland's future economy. Quantitatively, it would appear that Breckland has enough identified office floorspace to meet future needs under all three development scenarios to 2031.
- 8.17 Within the context of this identified surplus, there would appear to be very limited scope for new office development over the next few years in Breckland based on current levels of business demand and rental values/viability terms. However, over the longer term (i.e. 20 year plan period), it is recommended that any new provision of office space follows an enterprise centre style model, with small units for SMEs and local start-ups and shared workspace and networking opportunities. This model has worked relatively well in recent years (for example the Keystone Innovation Centre in Thetford and Wayland Business Centre in Watton) but would likely require financial assistance from the public sector in order to be viable, at least until such time as a greater demand profile can be established. Similarly, new provision could also take the form of follow-on space of a slightly larger scale to ensure that the District is better placed to be able to retain local firms as they grow and look to expand their premises (rather than moving out of the District to other larger centres nearby).
- 8.18 Many of the current employment allocations are isolated on the edge of the District's towns and will inevitably be less attractive for future potential office occupiers. For example, local commercial property market agents expressed doubts that there would ever be sufficient demand to justify retaining undeveloped plots of land for office development in the District (for example to the north and west of the Eco-Tech employment area in Swaffham). New office space should therefore be focused upon Breckland's town centres, benefitting from an attractive working environment and range of facilities for staff.

Supporting Wider Economic Growth in Breckland

- 8.19 Beyond purely B class uses (i.e. office and industrial uses), a number of other sectors are likely to make an important contribution to employment growth in Breckland over the plan period. For example, the construction, transport and hospitality sectors are expected to generate significant increases in employment in Breckland (as identified by the baseline EEFM growth forecasts) while retail and recreation are also anticipated to grow in employment terms over the next 20 years. Significant residential development associated with the proposed SUE to Thetford would provide a significant boost to consumption-related sectors as well as placing additional demands upon public services such as education and healthcare in the District.
- 8.20 Whilst the process of assessing space implications of non B class sector growth is beyond the scope of this study (because they are planned for using different methodologies), the growth needs of these sectors have the potential to create some pressures on employment land, particularly on those sites that have remained vacant for a number of years and do not appear to have any reasonable prospects of being developed for employment uses over the plan period. The analysis undertaken as part of this study would suggest that there is scope to review and rationalise the District's portfolio of employment sites and allocations, particularly within the context of a quantitative surplus of space available to accommodate B class growth to 2031. Part of this review could therefore consider the suitability of these sites to accommodate those sectors expected to grow in employment terms.
- 8.21 Given the rural nature of much of the District, it is also important that the Local Plan continues to recognise the important role of rural settlements in providing employment space and opportunities for local residents. This is unlikely to justify specific land allocations, however the provision of a positive policy framework (e.g. reuse of buildings) that encourages rural enterprise and diversification schemes represents the most appropriate way of ensuring that rural needs can be met.
- 8.22 One factor that will be important to supporting growth of businesses in the District (particularly office based businesses) will be the quality and speed of the broadband network within the district. Work is underway to improve upgrade cabling and improve connection speeds through initiatives such as 'Better Broadband for Norfolk', and such improvements are widely seen as important to improving the competitive position of Breckland for office sectors relative to larger centres such as Norwich, but also for home-based businesses.

Appendix 1 List of Consultees

Individual Consultees

David Dukes	Norfolk County Council
Gordon Ellis	Merrifields
Mark Kiddle-Morris	Breckland Council
Phil Morris	Norfolk County Council
Richard Pearson	Pearson Commercial
Robert Flint	Arnold Keys
Sam Kingston	Roche
Simon Burton	Baker Storey Matthews

Workshop Attendees

Arthur Morgan	Savills
Chris Parsons	Swaffham Business Forum
Ciaran Gunne-Jones	Nathaniel Lichfield & Partners
Cllr Michael Wassell	Council Leader
Daniel Cox	Breckland Council
Feng Li	Breckland Council
Graham Jones	Roche Chartered Surveyors
Isabel Lockwood	Bidwells
Jan Godfrey	The Wayland Partnership
Matthew Spry	Nathaniel Lichfield & Partners
Norman Wilson	WLP
Phil Mileham	Breckland Council
Philip Leslie	Eastern Attachments
Rob McIndoe	Richard Johnston Limited
Roger Margand	Dereham and District Chamber of Trade
Vicki Hackett	Savills

Appendix 2 Workshop Notes

Summary of views expressed by participants at the Planning for Business Needs in Breckland Business Workshop (held 11th October 2013)

- 1 **What should be the future economic role of Breckland?**
 - Quality of stock – low price
 - Concern other areas may be more attractive due to location such as Cambridge, but we could use the A11 corridor and cheaper rents to attract people outward along the A11 - such as overheated areas in the county.
 - Concern over low skills in the District.
 - Breckland needs to play to its strengths, linking local sectors together and undertaking proactive marketing to sell the quality of life factors.

- 2 **Which scenario of future needs should the Council plan for?**
 - Plan above baseline/baseline projections potentially undercooked.

- 3 **Does Breckland have an adequate portfolio of sites for industrial and office uses in the right locations? If not, what else is needed?**
 - Difficulty in premises/availability of premises.
 - Watton stock is of poor quality and one site is located in an unsuitable location centrally within the town surrounded by housing.
 - Thetford has a large amount of floor space where some areas are coming to the end of its shelf life.
 - Little speculative development in Breckland.
 - Issues with bringing forward larger employment sites such as TEP due to unlocking infrastructure issues.
 - Not a lot of interest in self builds.
 - Concern that Breckland may miss out on city deals (Norwich/Broadland) –Breckland is too far out of the city to benefit from these schemes.

- 4 **Are the current allocations suitable/appropriate to support potential employment development? Are there specific barriers to delivery?**
 - Long term interest in Snetterton Heath - need to unlock energy supply.
 - Need to look at delivery of sites.
 - Employment sites are under pressure from recreation/supermarkets.
 - Loss from non-B class units.
 - New sites need to ensure that they have infrastructure and services support.
 - Low levels of start-ups – this may be a geographic issue.
 - Many of the current employment allocations are isolated on the edge of town. These are fine for industrial occupiers, but will be less attractive for future potential office occupiers.

General comments

Viability and weak covenant strength of small local businesses have been major constraints to delivery of new employment space, even at the pre-recession peak of the market.

A11 dialling is key to improving the prospects for the district, not only making locations more attractive but also improving access to workforce.

Value aspirations of some landowners means that preference for non B class land uses. Therefore need to safeguard the best employment sites.

Need to improve low levels of business start-ups by providing greater support network for new businesses.

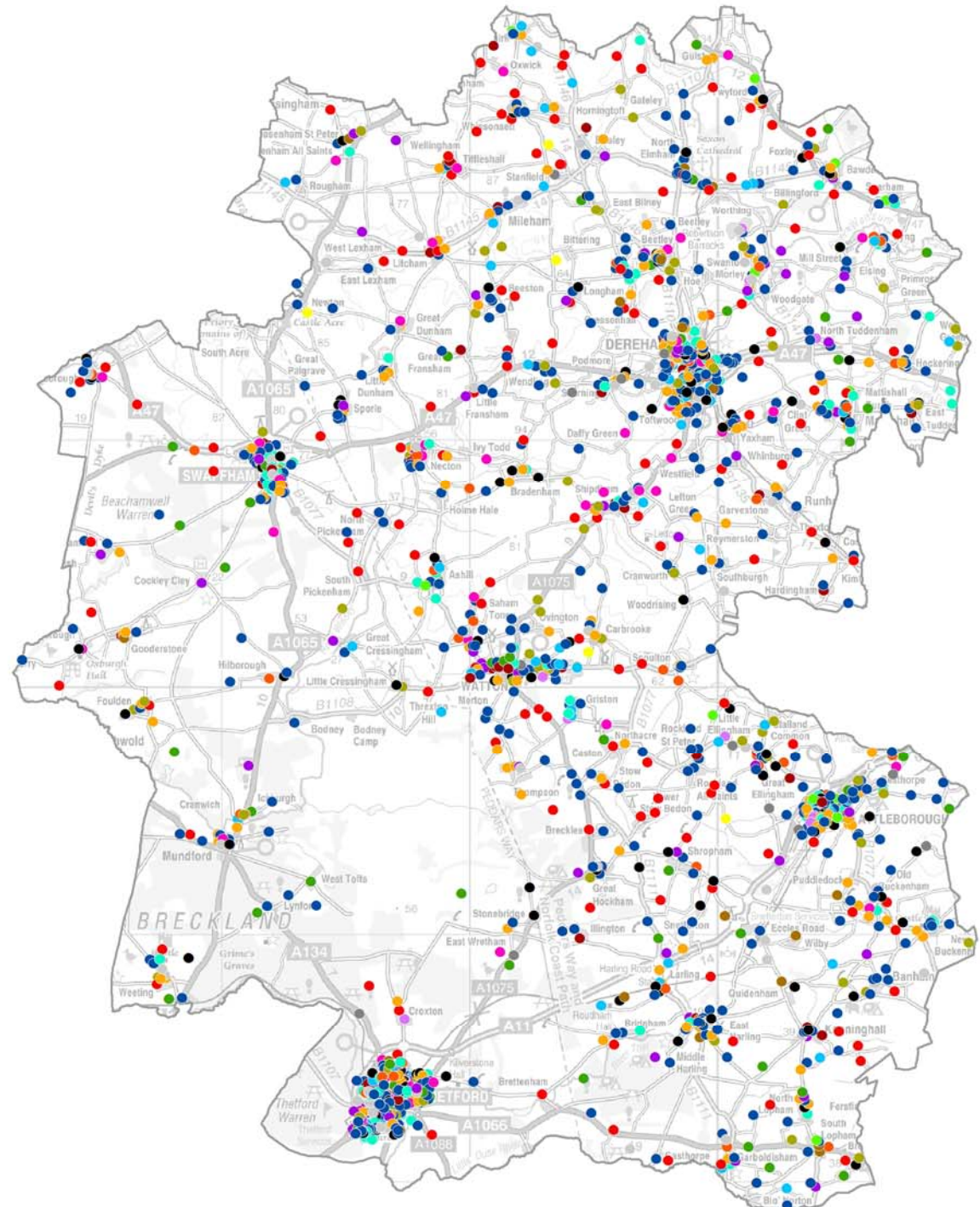
Appendix 3 IDBR Sector Mapping of District



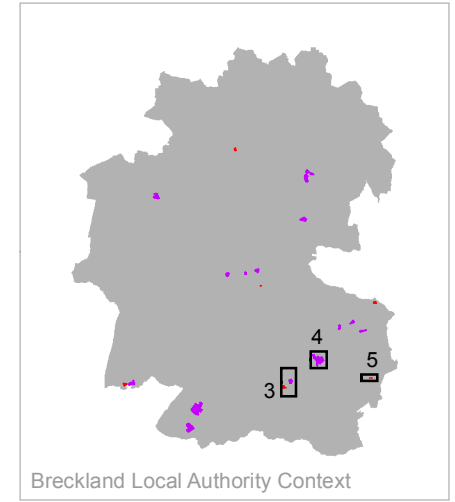
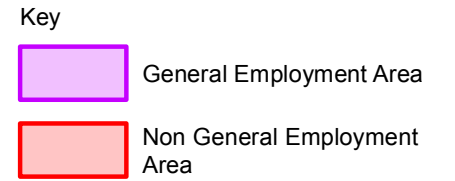
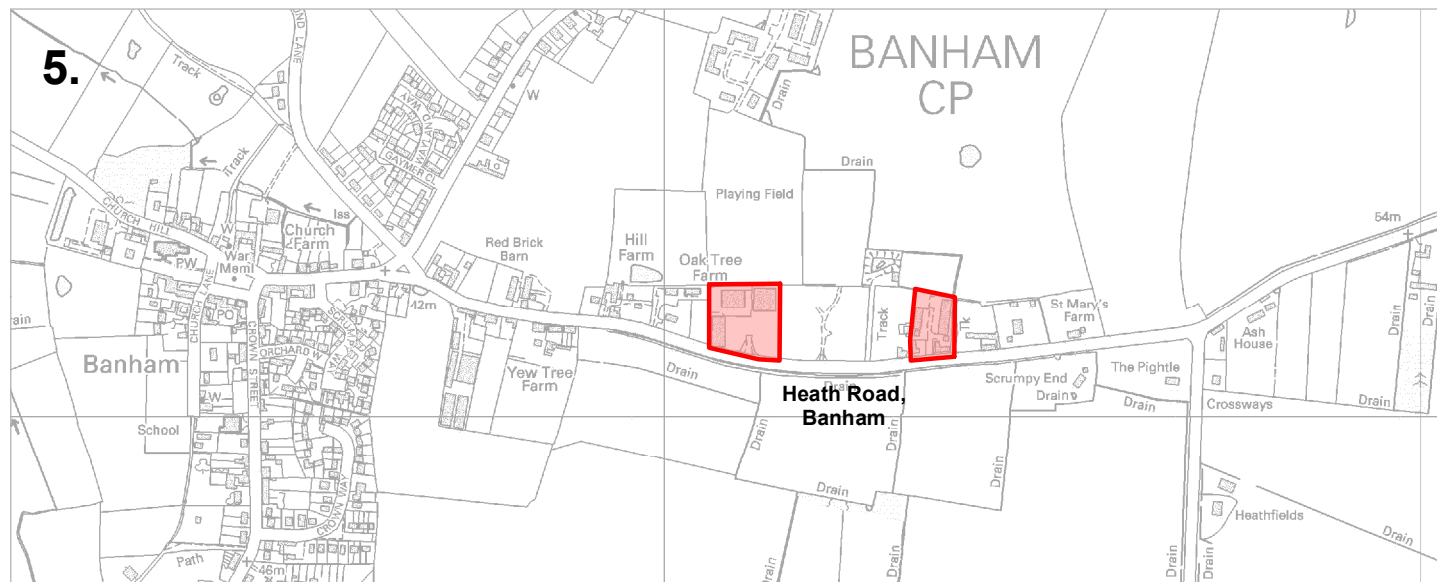
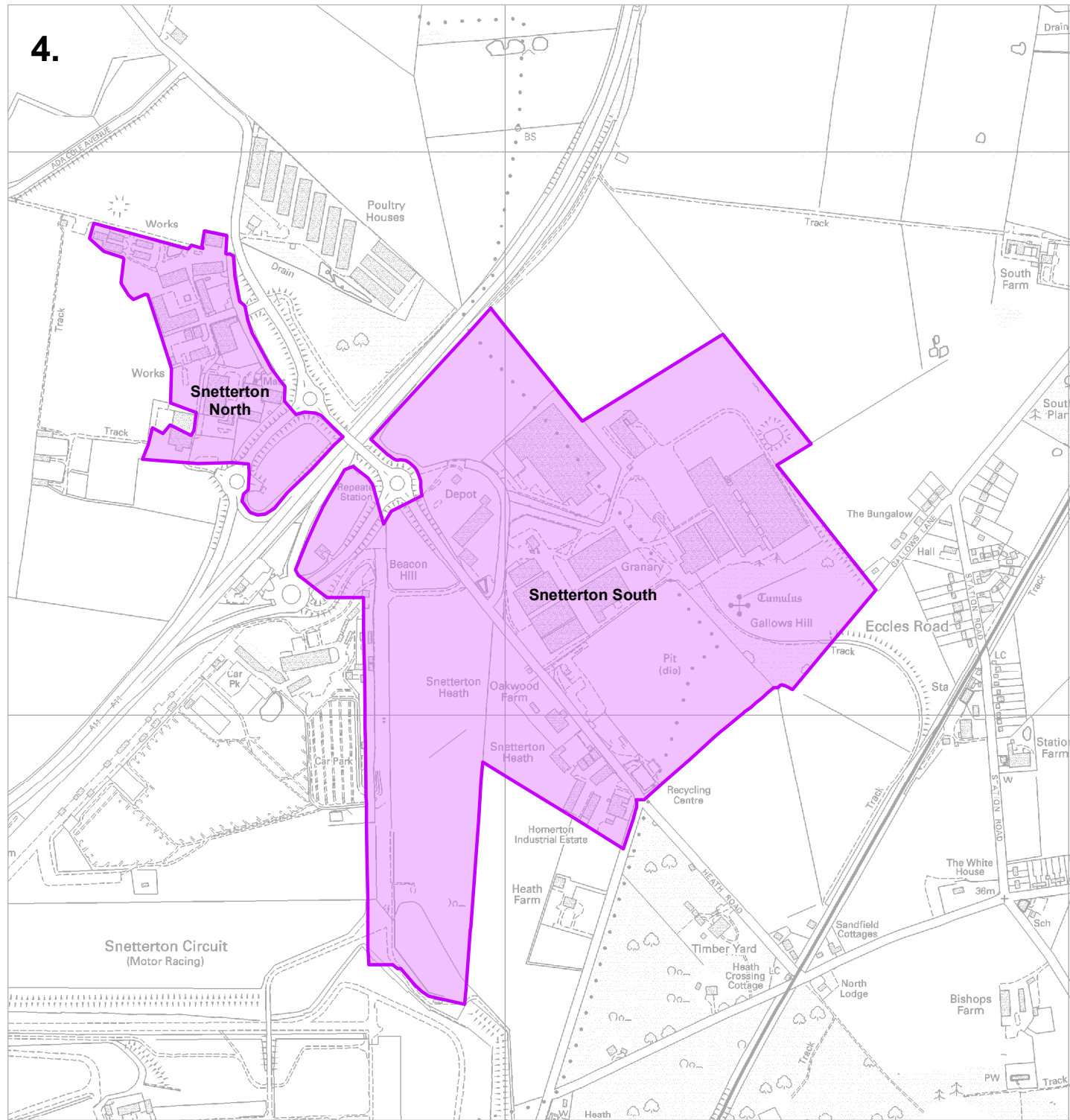
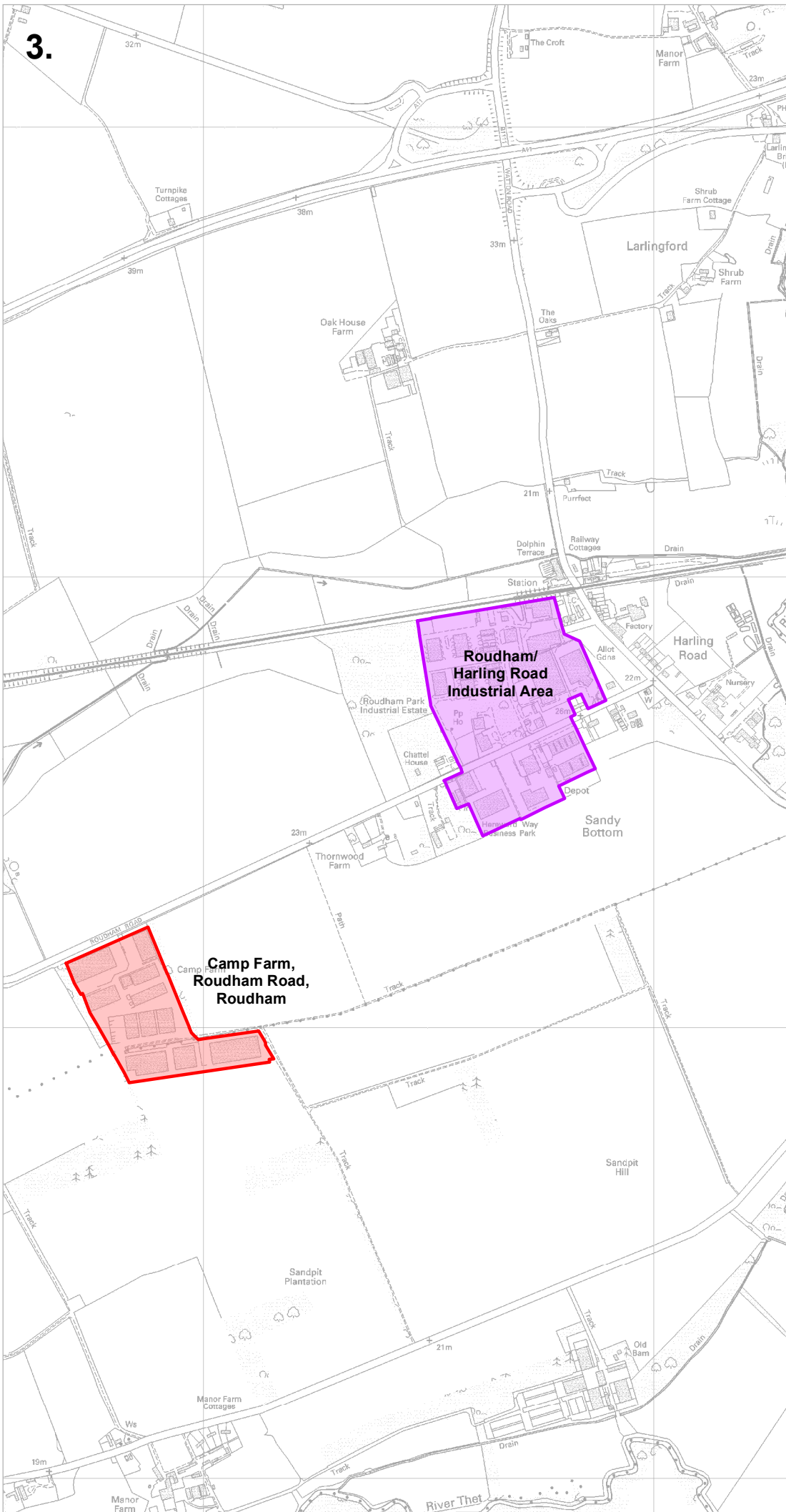
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Appendix 4 Site Plans



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Project Breckland Employment Study

Title Employment Sites

Client Breckland Council

Date 24.07.2013

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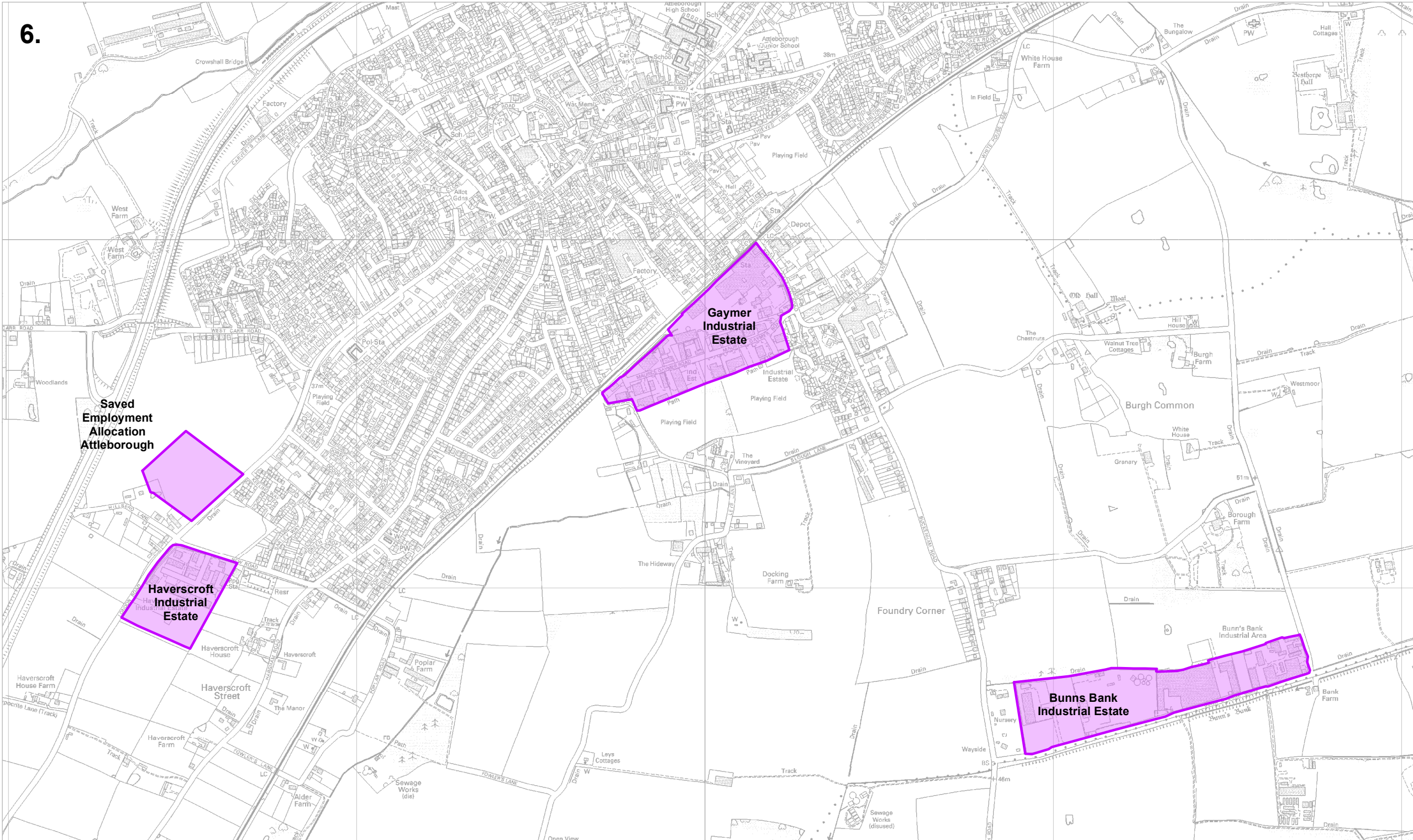
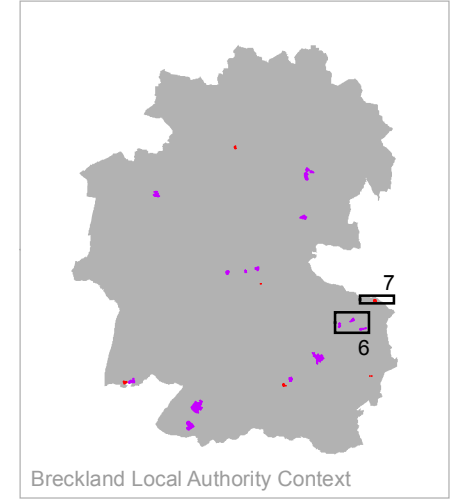
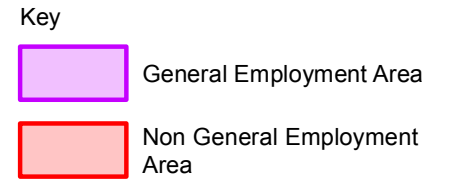
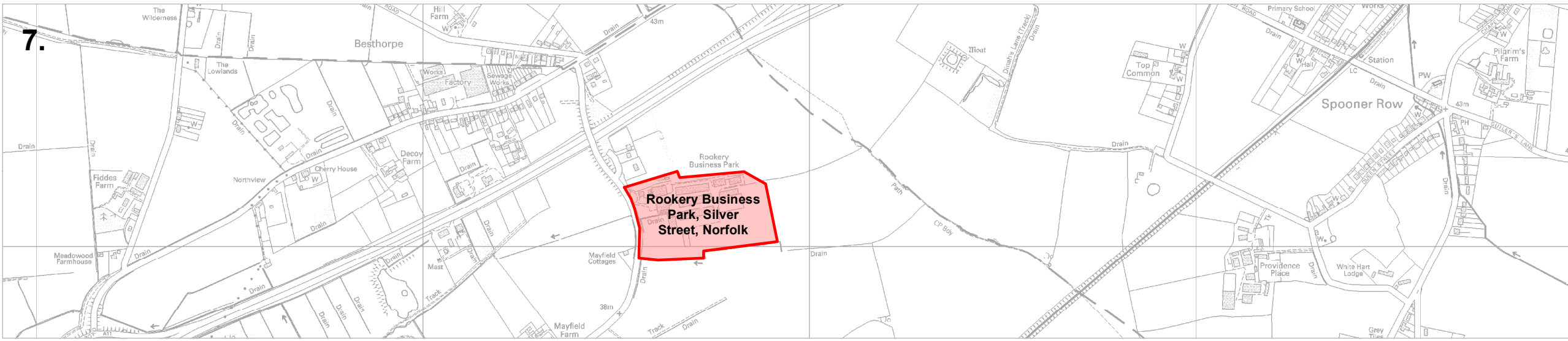
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Project Breckland Employment Study

Title Employment Sites

Client Breckland Council

Date 24.07.2013

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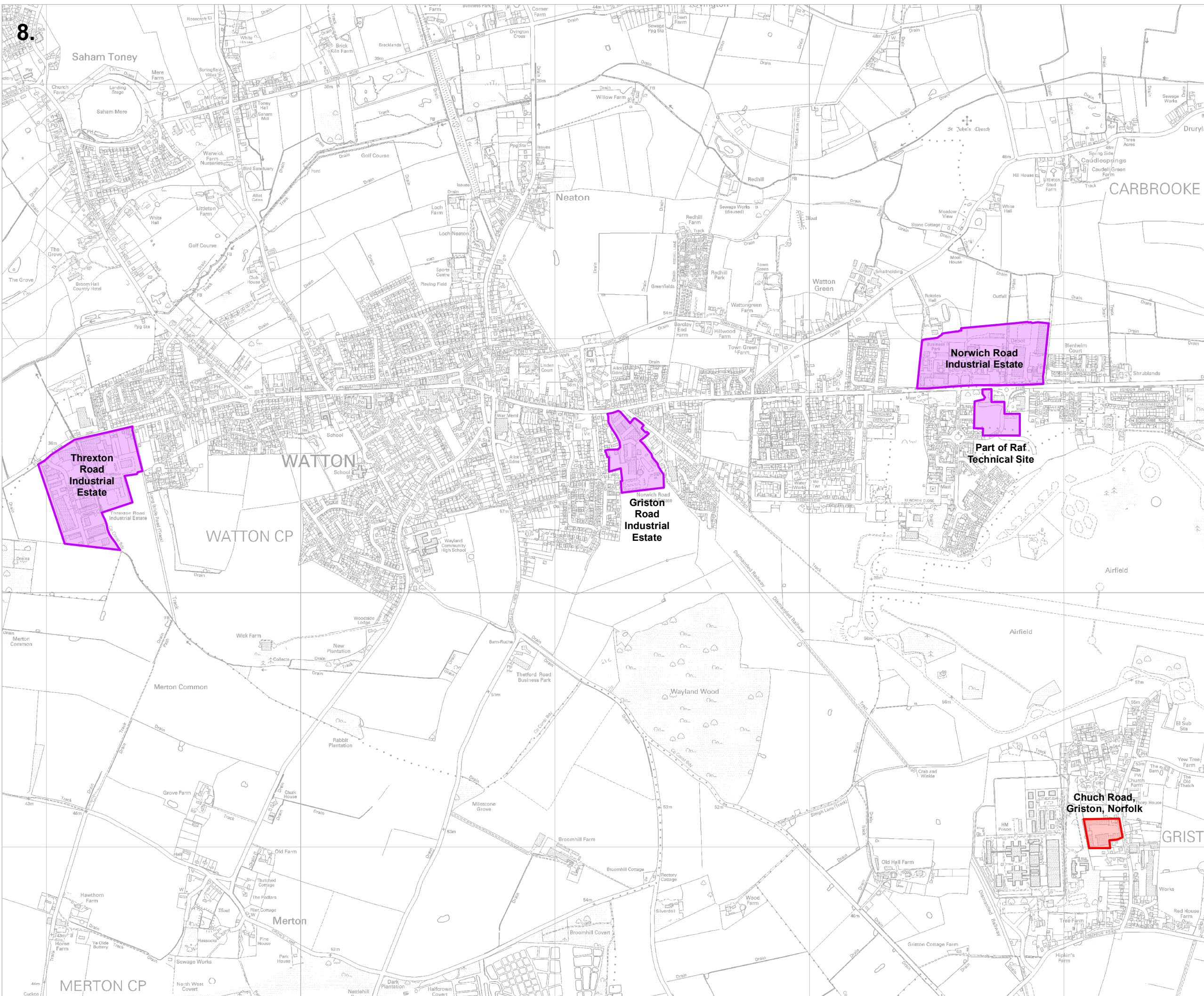
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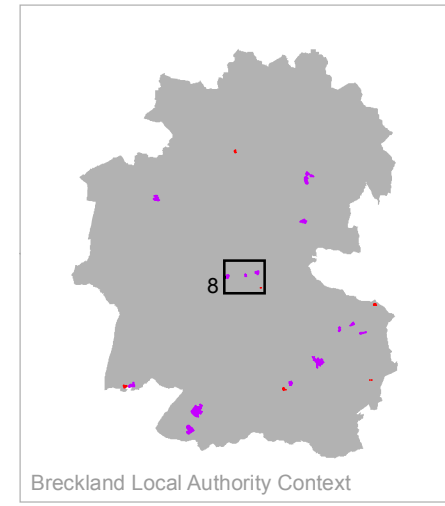




8.

Key

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- Non General Employment Area

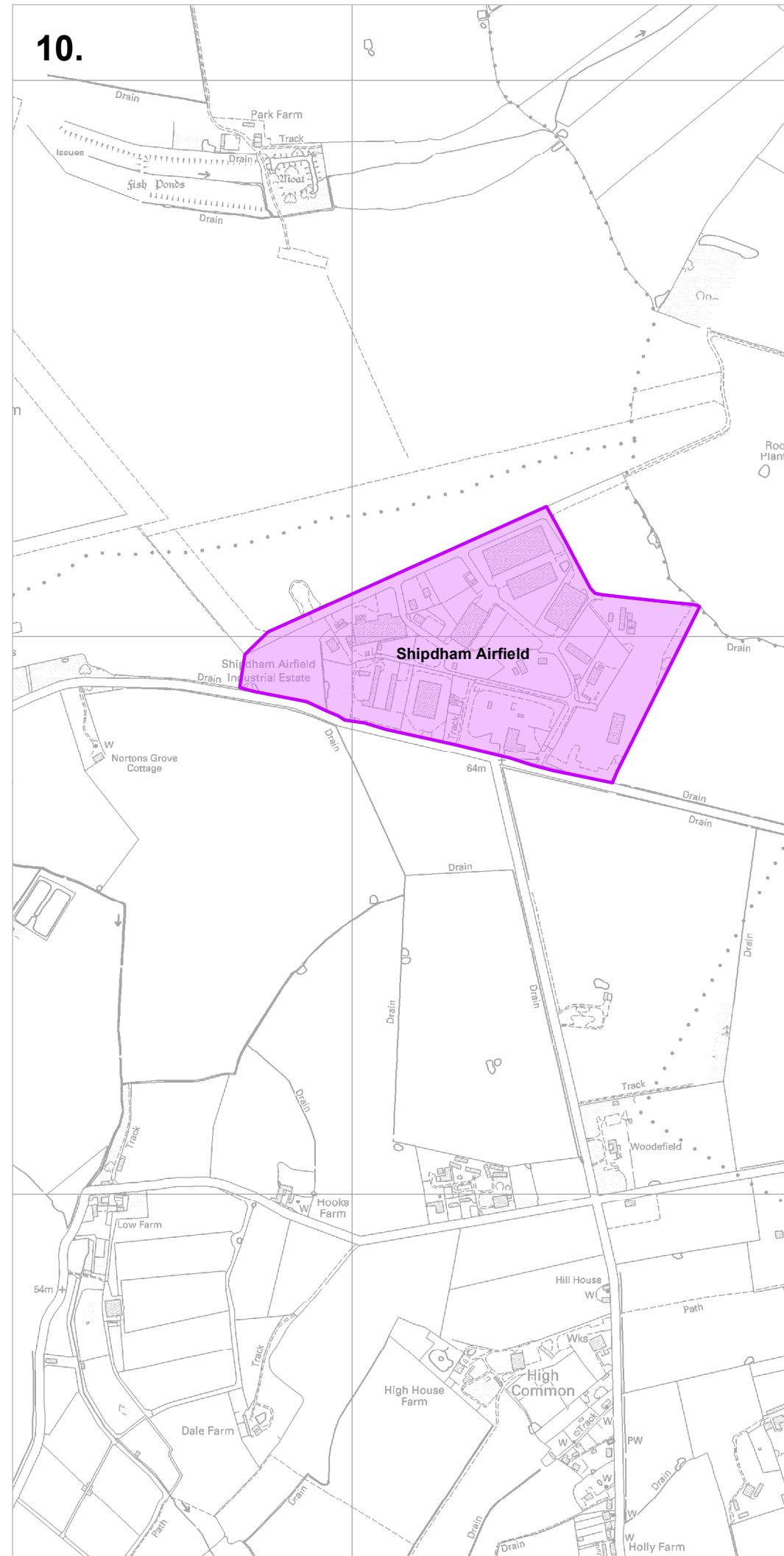
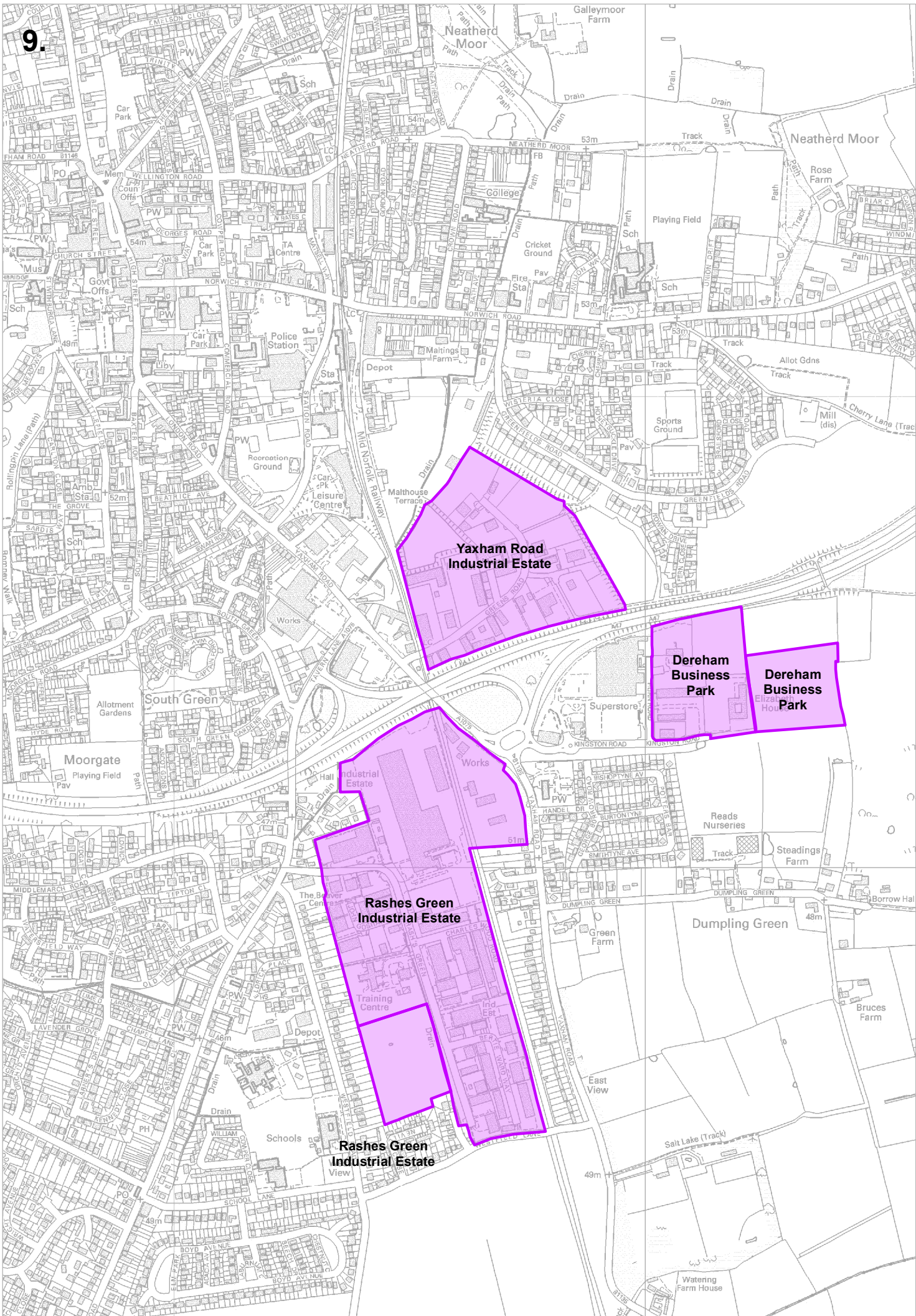


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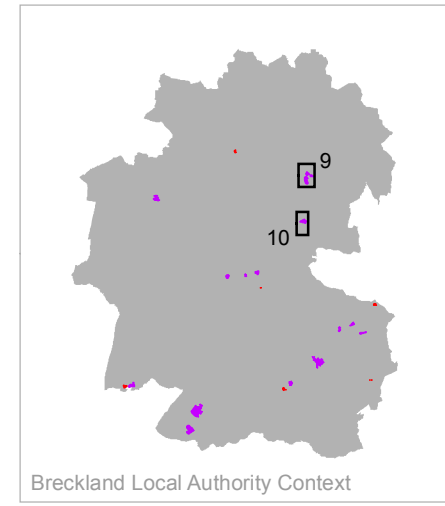
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Key

- General Employment Area
- Non General Employment Area



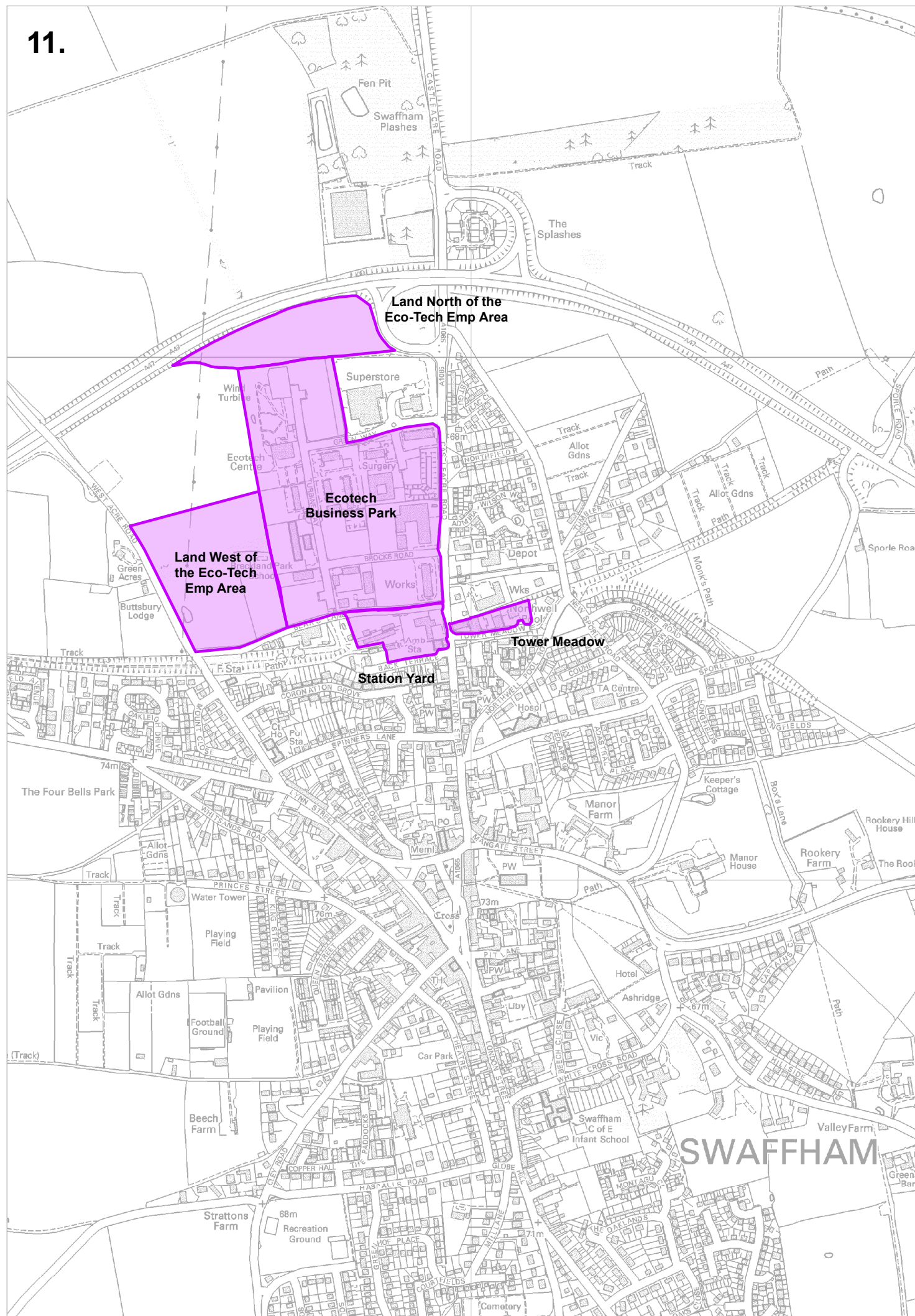
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Title	Employment Sites
Client	Breckland Council
Date	24.07.2013
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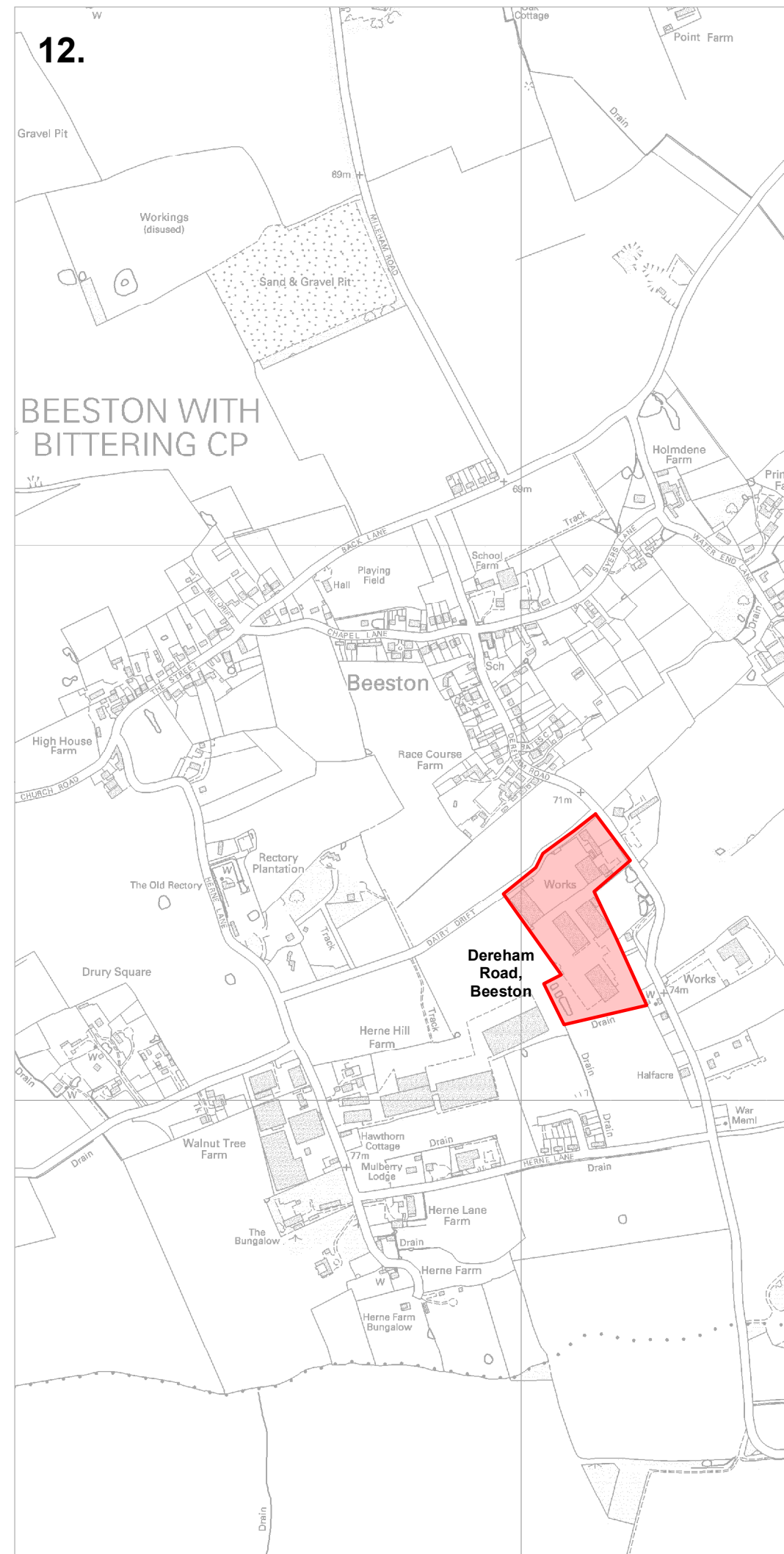
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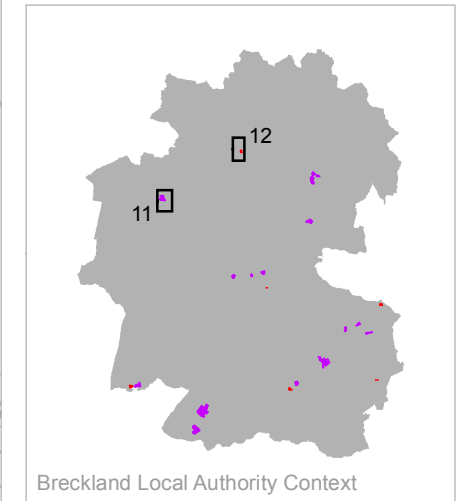


12.



Key

- General Employment Area
- Non General Employment Area



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Project Breckland Employment Study

Title Employment Sites

Client Breckland Council

Date 24.07.2013

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Appendix 5 Site Assessment Criteria

The proposed criteria for assessing the quality/condition of allocated and other existing sites reflecting the particular circumstances of the local authority area are set out below. These criteria mainly relate to the inherent value of a site rather than current conditions on it, although such characteristics would also be noted. Additional criteria would apply to undeveloped allocated/development sites although ownership and availability information may not be possible to obtain in many cases and a judgement may need to be made on these.

Each site is given a score of between 1 and 5 against each criterion (1 = poor, 5 = very good). No individual weightings are attached to different criteria.

Scorings can reflect a combination of different factors applying to the same criteria and a balanced judgment has to be made on an appropriate overall score.

Strategic Road Access

5 = **Very good:** within 2 Km of strategic road junction/ via good unconstrained roads

1 = **Poor:** over 5 Km from strategic road junction/access, and/or through constrained/local roads, and/or through town centre or residential areas etc.

NB: Strategic road is typically defined as a motorway or 'A class' trunk road.

Local Accessibility

5 = **Very good local access:** via free moving good roads avoiding residential areas/difficult junctions; unconstrained vehicle access to the site with good visibility/lack of queuing; close access to range of town centre public transport services

1 = **Poor:** difficult/narrow road access, via residential roads, difficult site access junction, congested local roads; low level/limited range/infrequent public transport services nearby

Proximity to Urban Areas and Access to Labour and Services

5 = **Very good:** near centre of urban area with wide range of services nearby; proximity to sizeable residential areas providing local labour supply

1 = **Poor:** remote isolated site, no local services or residential areas nearby

Site characteristics and development constraints

5 = **Very good:** generally level site, regular shape, over 3 ha in size; low flood risk (Zone 1); no conservation or landscape constraints on scale of

development; no adverse ground conditions or abnormal development costs; no other significant constraints on new development

1 = **Poor:** sloping/uneven site; under 0.5 ha, irregular/narrow shape, other severe constraints; within flood risk Zone 3; conservation or landscape constraints on scale of development; adverse ground conditions or abnormal development costs

Proximity to incompatible uses

5 = Within larger employment area/no incompatible surrounding land use

3-4 = B1 use adjoining residential/other sensitive uses

1 = B2/B8 adjoining residential/other sensitive uses

Market Attractiveness

5 = **Very good:** high profile/high quality appearance, managed site; good environment and quality of occupiers; under 10% vacant; viewed as attractive by agents/occupiers; recent investment/development activity, strong demand, units rarely available

1 = **Poor:** run-down unattractive appearance/location; attracts lower end users and over 25% vacant space/buildings; vacant units not marketed; no recent investment; units remain vacant for lengthy period

Sequential Status

Applies to existing/potential office sites only – identifies whether site is in town centre, edge of centre or out-of-centre location in NPPF terms

Barriers to Delivery

Identify any factors that would constrain development of the site for employment uses e.g. site occupied, need for infrastructure

Planning Factors

Identify any planning designations or policy constraints that could affect development of the site for employment uses

Appendix 6 Site Assessments

Site Reference	Site Name	Area (ha)	Site Status	Assessment Criteria							Future Potential				General Comments
				Strategic Access	Local Access	Proximity to Labour & Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	TOTAL SCORE (/30)	Planning Factors	Barriers to Delivery	Timescale for Delivery	Potential Uses	
1	Bunns Bank Industrial Estate, Attleborough	12.45	General Employment Area	2	3	3	2	3	2	15	Designated employment area	Cost of remediation work	Potentially, in the short/medium term	B1c, B2 and B8	Site comprises a large parcel of land that has been partially cleared of buildings and is now only used for parking.
2	Gaymer Industrial Estate, Attleborough	11.42	General Employment Area	2	3	3	2	3	2	15	Designated employment area				Fully developed site. Some units are dated and poorly specified.
3	Haverscroft Industrial Estate, Attleborough	5.52	General Employment Area	4	3	3	4	3	2	19	Designated employment area	None identified	Could come forward in the short/medium term	All types of B1, B2 and B8	This site has only partially been developed. Adjacent undeveloped plot features a site road and it is understood that all the main services have been connected.
4	Saved Employment Allocation, Attleborough	3.97	General Employment Area	5	3	3	2	1	2	16	Designated employment area with part planning permission for residential use	Cost of providing infrastructure and services	Short to medium term	All types of B1, B2 and B8	This site takes the form of a parcel of land in a field which is currently farmed. Planning permission recently granted for mixed use development providing up to 12,000 sq.m of B1/B8 floorspace (including a planning condition for a period of marketing)
5	Dereham Business Park, Dereham	5.29	General Employment Area	5	3	4	4	4	3	23	Designated employment area	N/A	N/A	B1c	The build quality of this scheme, which was completed relatively recently, is considered to be good. A small overgrown plot (1.1 hectares) is undeveloped.
6	Dereham Business Park, Dereham	3.21	General Employment Area	5	3	4	4	1	2	19	Designated employment area	Dereham's closeness to Norwich	Unlikely to occur in the short/medium term	All types of B1	Undeveloped site. If there was sufficient local demand this site would be suitable for purpose built office accommodation.
7	Rashes Green Industrial Estate, Dereham	25.10	General Employment Area	4	3	4	3	3	1	18	Designated employment area	N/A	N/A	All types of B1, B2 and B8	A large site that appears to be fully developed. Some stock on this estate is dated and/or is poorly specified, and some units are currently vacant.
8	Rashes Green Industrial Estate, Dereham	3.20	General Employment Area	4	2	4	1	1	1	13	Designated employment area	Relatively poor access and lack of infrastructure	N/A	Retain as is	This is a small greenfield site which effectively delimits the existing estate from nearby housing. Due to the costs involved it has limited prospects of delivering any form of employment use.
9	Yaxham Road Industrial Estate, Dereham	13.23	General Employment Area	5	4	4	4	3	2	23	Designated employment area	None identified		B1c, B2 and B8	A parcel of land on this site is currently only used for parking – potentially this could be used for additional employment development.

Site Reference	Site Name	Area (ha)	Site Status	Assessment Criteria							Future Potential				General Comments
				Strategic Access	Local Access	Proximity to Labour & Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	TOTAL SCORE (/30)	Planning Factors	Barriers to Delivery	Timescale for Delivery	Potential Uses	
10	Snetterton North, Snetterton	9.22	General Employment Area	5	2	2	2	4	4	19	Designated employment area	N/A	N/A	B1c, B2 and B8	This site is fully developed and is now as referred as the Snetterton Business Park.
11	Snetterton South, Snetterton	64.70	General Employment Area	5	2	2	4	1	4	18	Designated employment area	Lack of infrastructure and services	Medium term	B1c, B2 and B8	A substantial site, only partially developed, with very good access to the A11 but notably there may be insufficient electricity capacity in the area, which could constrain further development.
12	Ecotech Business Park, Swaffham	14.09	General Employment Area	5	5	4	4	4	3	25	Designated employment area	Market interest/policy focus is now centred on Thetford	Unlikely to occur in the short/medium term	All types of B1	Highly accessible employment site located close to Swaffham's centre and the strategic road network. Most of the site has been developed, but despite its success several plots are still undeveloped.
13	Land North of the Eco-Tech Emp Area, Swaffham	3.14	General Employment Area	5	4	4	2	1	1	17	Designated employment area	Market interest/policy focus is now centred on Thetford	Development of this site in short/medium term seems remote	All types of B1	Undeveloped site
14	Land West of the Eco-Tech Emp Area, Swaffham	5.85	General Employment Area	5	4	4	2	1	1	17	Designated employment area	Market interest/policy focus is now centred on Thetford	Development of this site in short/medium term seems remote	All types of B1	Undeveloped site adjacent to A47
15	Station Yard, Swaffham	1.55	General Employment Area	4	4	4	4	3	1	20	Designated employment area	Non identified	N/A	B1c	This site mainly comprises a car park but also features a row of 10 small light industrial units, all of which appear to be in use.
16	Tower Meadow, Swaffham	0.53	General Employment Area	4	4	4	4	3	2	21	Designated employment area	N/A	N/A	B1c	Fully developed employment site comprising 4 light industrial units, all of which are occupied.
17	Brunel Way Industrial Estate, Thetford	38.75	General Employment Area	5	4	4	4	4	2	23	Designated employment area	N/A	N/A	All types of B1, B2 and B8	A large site that appears to be fully developed, though some plots may be underutilised and/or there could be scope for some infill. Some stock on this estate is dated and/or is poorly specified, and some units are currently vacant.

Site Reference	Site Name	Area (ha)	Site Status	Assessment Criteria							Future Potential				General Comments
				Strategic Access	Local Access	Proximity to Labour & Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	TOTAL SCORE (/30)	Planning Factors	Barriers to Delivery	Timescale for Delivery	Potential Uses	
18	Burrell Way Industrial Estate, Thetford	30.56	General Employment Area	4	4	4	4	4	2	22	Designated employment area	N/A	N/A	All types of B1, B2 and B8	A large site that appears to be fully developed, though some plots may be underutilised and/or there could be scope for some infill. Some stock on this estate is dated and/or is poorly specified, and some units are currently vacant.
19	Caxton Way Industrial Estate, Thetford	22.06	General Employment Area	4	4	4	4	1	1	18	Designated employment area	Extensive refurbishment/ redevelopment required to bring vacant buildings back into use	Medium/long term	All types of B1, B2 and B8	The site predominately comprises former food production facilities. Extensive refurbishment/redevelopment required to bring vacant buildings back into use. Very little market interest in this site
20	Caxton Way, Thetford	7.15	Saved Employment Allocation	3	3	4	2	1	1	14	Designated employment area	There is little scope of this site coming forward until there is greater certainty regarding the existing Caxton Way estate	Medium/long term	B1c, B2 and B8	Largely undeveloped site backing onto A11.
21	Fi Way Industrial Estate	48.17	General Employment Area	5	4	4	4	3	3	23	Designated employment area	N/A	N/A	All types of B1, B2 and B8	Probably has the largest concentration of transport and logistics businesses in Thetford. Some stock on this estate is dated and/or is poorly specified, though this seems to be more of an issue on other employment sites in the town.
22	Site adj. to Fison Way Industrial Estate, Thetford	8.99	Saved Employment Allocation	5	3	4	4	3	3	22	Designated employment area - forms part of Thetford's urban extension	None obvious	Dependent on over phases on Thetford's planned urban extension - Medium to long term	All types of B1, B2 and B8	Undeveloped site located between the Fison Way Industrial Estate and A11

Site Reference	Site Name	Area (ha)	Site Status	Assessment Criteria							Future Potential				General Comments
				Strategic Access	Local Access	Proximity to Labour & Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	TOTAL SCORE (/30)	Planning Factors	Barriers to Delivery	Timescale for Delivery	Potential Uses	
23	Thetford Enterprise Park, Thetford	18.09	General Employment Area	5	4	4	4	5	4	26	Outline planning permission has been granted for the business park	Requires the development of a new spine road and other infrastructure improvements	Dependent on over phases on Thetford's planned urban extension - Medium to long term	All types of B1, B2 and B8	A foodstore is proposed for a plot on this site which would reduce the amount of employment development, but this proposal will provide some of the infrastructure this site requires.
24	Griston Road Industrial Estate, Watton	4.26	General Employment Area	1	4	3	1	2	2	13	Designated employment area	See comments		B1c, B2 and B8	New housing in Watton is encroaching on this existing employment site – it is still very much in use but some buildings are now derelict.
25	Norwich Road Industrial Estate, Watton	11.23	General Employment Area	2	4	3	3	3	3	18	Designated employment area	None obvious		All types of B1, B2 and B8	The site features a few undeveloped parcels of land. A number of units are currently vacant. The development of a new roundabout has strengthened the viability of the site by improving local access.
26	Part of RAF Technical Site, Watton	2.16	General Employment Area	2	4	4	3	3	1	17	Designated employment area	No apparent market interest in this site for employment use, which has poor visibility from Norwich Rd	No scope in the short/ medium term	All types of B1	Employment use for this site was intended to be included IN a major housing led mixed use development. With the exception of this site that scheme has now been developed. Consideration should be given to using this site for an alternative use.
27	Threxton Road Industrial Estate, Watton	12.45	General Employment Area	3	3	3	3	4	4	20	N/A	N/A	N/A	All types of B1, B2 and B8	The site is almost fully developed, although potentially there is scope for a small amount of infill. Market feedback indicates there is strong, local demand for space on this estate.
28	Mundford Road, Weeting	23.48	General Employment Area	3	4	4	2	3	1	17	Designated employment area	Adjoins Breckland forest, which has SSSI status	No scope for redevelopment of unused plots in the short/ medium term	B1c, B2 and B8	Much of this site has been developed and is in use, but part it is underutilised and has been neglected.

Site Reference	Site Name	Area (ha)	Site Status	Assessment Criteria							Future Potential				General Comments
				Strategic Access	Local Access	Proximity to Labour & Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	TOTAL SCORE (/30)	Planning Factors	Barriers to Delivery	Timescale for Delivery	Potential Uses	
29	Fengate Drive, Weeting	9.9	Non General Employment Area	3	2	2	1	1	1	10	No longer designated as an employment area	Site is at risk of flooding and further development may have an adverse effect on nearby SPA	Very little scope for redevelopment of unused land in the short/medium term	B1c, B2 and B8	Further employment development on this site is now likely to be resisted.
30	Heath Road, Banham	1.37	Non General Employment Area	1	3	3	2	4	2	15		Poor access to the strategic road network	N/A	B1c and B8	This employment site serves the rural settlement of Banham.
31	Dereham Road, Beeston	4.99	Non General Employment Area	1	2	2	1	2	2	10		See comment	N/A	B1c, B2 and B8	Fully developed site mainly comprising warehousing and light industrial units. Located over 2 miles from the A47 and no roadside signage – the site has very poor access to the strategic road network.
32	Rookery Business, Park Silver Street, Bethorpe	6.96	Non General Employment Area	3	1	2	1	3	3	13		See comment	N/A	B1 and B2 only	Fully developed site mainly comprising warehousing and light industrial units. Poor access to local services and relatively inaccessible. Silver Street is not suited for heavy traffic or HGVs.
33	Church Road, Griston	1.41	Non General Employment Area	2	3	3	2	3	2	15		See comment	N/A	B1c, B2 and B8	Fully developed site almost directly opposite the former Quantrells Industrial Estate. Relatively poor access to local services and labour.
34	Camp Farm, Roudham Road, Roudham	7.03	Non General Employment Area	2	3	1	1	2	2	11		See comment	N/A	B8	Fully developed site in rural location, being used for B8 storage purposes. The site has very poor access to local services and labour.
35	Roudham/Harling Road Industrial Area	14.50	General Employment Area	4	3	2	2	2	3	16	Designated employment area	None obvious	N/A	B1c and B2	Fully developed site occupying both sides of Harling Road and notably comprising the Hereward Way Business Park. Despite its rural location the site has good access to the strategic road network via the nearby A11.

Site Reference	Site Name	Area (ha)	Site Status	Assessment Criteria							Future Potential				General Comments
				Strategic Access	Local Access	Proximity to Labour & Services	Compatibility of Adjoining Uses	Development & Environmental Constraints	Market Attractiveness	TOTAL SCORE (/30)	Planning Factors	Barriers to Delivery	Timescale for Delivery	Potential Uses	
36	Shipdham Airfield Industrial Estate	22.22	General Employment Area	1	2	2	4	3	3	15	This site is designated for heavy/bad neighbour industrial development	See Comment	N/A	B1c, B2 and B8	A large site part used as a waste transfer station, but also comprising some commercial units. The site appears to be fully developed, though some plots may be underutilised.

Appendix 7 Definition of B Class Sectors

The method used for re-categorising the employment forecasts by sector into B-Class uses is summarised below.

Apportionment of B Class Sectors to Land Uses

EEFM Sector	Proportion of Jobs by Use Class		
	B1 Office	B2 Industrial	B8 Warehousing
Agriculture, Forestry & Fishing	Non B-Class		
Extraction & Mining	Non B-Class		
Food, Drink & Tobacco (manufacture of)	0%	100%	0%
Textiles & Clothing (manufacture of)	0%	100%	0%
Wood & Paper (manufacture of)	0%	100%	0%
Printing and Recorded Media (manufacture of)	0%	100%	0%
Fuel Refining	0%	100%	0%
Chemicals (manufacture of)	0%	100%	0%
Pharmaceuticals (manufacture of)	0%	100%	0%
Non-Metallic Products (manufacture of)	0%	100%	0%
Metal Products (manufacture of)	0%	100%	0%
Computer & Electronic Products (manufacture of)	0%	100%	0%
Machinery & Equipment (manufacture of)	0%	100%	0%
Transport Equipment (manufacture of)	0%	100%	0%
Other Manufacturing	0%	100%	0%
Utilities	0%	73%	0%
Construction of Buildings	Non B-Class		
Civil Engineering	Non B-Class		
Specialised Construction Activities	0%	36%	0%
Wholesale	0%	23%	77%
Retail	Non B-Class		
Land Transport, Storage & Post	0%	0%	73%
Air & Water Transport	Non B-Class		
Accommodation & Food Services	Non B-Class		
Recreation	Non B-Class		
Media Activities	100%	0%	0%
Telecoms	100%	0%	0%
Computing & Information Services	100%	0%	0%
Finance	100%	0%	0%
Insurance & Pensions	100%	0%	0%
Real Estate	100%	0%	0%
Professional Services	100%	0%	0%
Administrative & Supportive Services	13%	0%	0%
Other Private Services	Non B-Class		
Public Administration & Defence	10%	0%	0%
Education	Non B-Class		
Health	Non B-Class		
Residential Care & Social Work	Non B-Class		

Source: EEFM/NLP analysis

Appendix 8 EEFM Baseline Forecasts

EEFM Sector	Workforce Jobs			
	2011	2031	Change 2011-2031	% Change 2011-2031
Agriculture, Forestry & Fishing	2,359	1,810	-549	-23.3
Extraction & Mining	24	12	-12	-49.8
Food, Drink & Tobacco (manufacture of)	2,185	1,893	-292	-13.4
Textiles & Clothing (manufacture of)	0	0	0	0.0
Wood & Paper (manufacture of)	0	0	0	0.0
Printing and Recorded Media (manufacture of)	0	0	0	0.0
Fuel Refining	0	0	0	0.0
Chemicals (manufacture of)	1,097	850	-247	-22.5
Pharmaceuticals (manufacture of)	429	359	-70	-16.3
Non-Metallic Products (manufacture of)	0	0	0	0.0
Metal Products (manufacture of)	845	759	-86	-10.2
Computer & Electronic Products (manufacture of)	394	273	-121	-30.7
Machinery & Equipment (manufacture of)	0	0	0	0.0
Transport Equipment (manufacture of)	555	336	-218	-39.4
Other Manufacturing	2,388	2,143	-245	-10.3
Utilities	478	373	-106	-22.1
Construction of Buildings	1,585	1,887	303	19.1
Civil Engineering	563	692	129	22.8
Specialised Construction Activities	2,406	2,856	450	18.7
Wholesale	3,395	3,833	438	12.9
Retail	5,659	5,977	318	5.6
Land Transport, Storage & Post	3,143	3,800	658	20.9
Air & Water Transport	1	2	1	56.9
Accommodation & Food Services	2,594	3,158	563	21.7
Recreation	1,355	1,743	388	28.6
Media Activities	124	155	31	24.6
Telecoms	18	19	0	1.4
Computing & Information Services	235	319	85	36.1
Finance	490	536	46	9.4
Insurance & Pensions	0	0	0	0.0
Real Estate	623	911	289	46.4
Professional Services	4,361	6,431	2,070	47.5
Administrative & Supportive Services	882	1,090	208	23.6
Other Private Services	1,662	1,920	258	15.5
Public Administration & Defence	2,013	1,887	-126	-6.3
Education	4,007	3,619	-388	-9.7
Health	4,851	5,035	184	3.8
Residential Care & Social Work	0	0	0	0.0
Total	50,722	54,679	3,957	7.8

Source: Oxford Economics / NLP analysis



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