Norfolk County Council

Strategic Employment Site Study

Final Report

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1 Introduction

1.1 In May 2004, GVA Grimley was commissioned by Norfolk County Council to undertake an assessment of an agreed list of strategic employment land allocations across the County of Norfolk and advise on the delivery of a small number of these sites.

1.2 The study specifically addresses the potential development constraints and opportunities on the sites included (and agreed with the Client Steering Group) and assesses them in the context of the prevailing economic and property market. The study provides a strategic classification of these sites and prioritises them in terms of the ease by which they can be delivered by the private sector. Finally the report provides advice on the potential role of the public sector in helping to unlock sites that are suffering from market failure or have the potential for enhanced development with appropriate public assistance.

1.3 This document comprises the final report to the Steering Group. The structure of the report is as follows: Section Two outlines the methodology and approach to the study; Section Three provides a review of a selection of relevant literature; Section Four examines the economic base of the study area; and, Section Five details the strategic employment site prioritisation.

1.4 A series of appendices accompany this report. **Appendix A** includes a copy of the Original Brief for consultants dated 25th February 2004. **Appendix B** constitutes a detailed work programme issued and revised at the outset of the study in June 2004. **Appendix C** is a full list of sites recommended for inclusion before the initial proofing and **Appendix D** is made up of the detailed site specific pro-forma which include delivery advice, where relevant.

2 Methodology

2.1 The following section outlines the methodology used to develop a new list of strategic employment sites for Norfolk. It builds on the approach to the study developed at the outset of the project, in consultation with Norfolk County Council. This detailed work programme can be found in **Appendix B**.

2.2 The objectives of the employment land study were defined as follows:

- To review and update the County-wide strategic sites survey undertaken in 1997, to reflect current land availability, planning policy and economic and market conditions
- To identify with the client Steering Group an agreed 'long-list' list of strategic employment sites
- To prioritise those sites that are capable of being delivered in the short, medium and long-term
- To assess those sites that are not capable of being delivered under current market conditions and which, as a result of market failure, may require third party (public sector) intervention to facilitate delivery
- To provide a broad action plan relating to potential use and issues of delivery for a number of those sites which will not be brought forward without third party intervention.

2.3 The two main substantive outputs of the study are a refreshed list of strategic employment sites throughout Norfolk, which together meet the County's strategic employment needs and high-level advice on the deliverability of a number of those sites and, where necessary, recommendations on interventions aimed at over-coming market failure.

2.4 The study process culminating in the identification of a revised list of strategic sites was divided into three parts:

- Review of original WS Atkins list of strategic employment sites
- Review and refresh designation criteria
- Preparation of a revised list of strategic sites.

2.5 These three parts of the study are discussed in detail below.

Review of original WS Atkins list of strategic employment sites

2.6 WS Atkins produced a list of strategic employment sites in Norfolk and Waveney in 1997. Our first task involved a review of this original list to assess which sites have been partially or fully developed since the 1997 study was completed. The sites which had been developed could then be excluded from our analysis whilst those that had not could remain in the study to be re-assessed.

2.7 In order to understand which sites had progressed we undertook a desk-based review of each of the Norfolk Districts' Local Plans. Where Local Plans had been replaced since 1997, it was possible to make an initial cross-reference of progress since 1997. Where Local Plans hadn't been updated, we consulted local stakeholders with detailed knowledge of the sites to provide an update on their development status. An annotated shortlist of strategic sites was then forwarded to the client for approval (see Table 5.1).

Review and refresh designation criteria

2.8 The objective of this second task was to review and refresh strategic site designation criteria originally used in the WS Atkins study. The criteria were reviewed in order to reflect the current local economic conditions and prevailing policy guidance. Sites were then nominated by each of the Norfolk Districts for inclusion in the study.

2.9 Before a final decision on whether or not to include the nominated sites was made, each of the sites was given an initial proofing to ensure that they fell within the remit of the study. This proofing involved a review of site size and an indicative assessment of the overall level of constraint to development. The sites considered to be too small or those that were subject to little or no development constraint were excluded from our analysis. The remaining sites would form the focus of the study.

2.10 The outcome of this element of the work programme was a new, long list of strategic employment sites. A full list of sites, including those that were subsequently excluded is provided at **Appendix C**.

Preparation of a revised list of strategic sites

2.11 Having collated a new list of strategic employment sites, we undertook a series of tasks aimed at building our understanding of the nature, key issues, and constraints relating to each of the sites. To achieve this we conducted desk-based analyses, site visits and sectoral employment analysis. We also consulted relevant local authority officers and other key stakeholders.

2.12 In order to analyse each of the strategic employment sites, a number of further tasks were undertaken. These were site classification, quantitative constraint assessment and examination of local level sectoral employment.

Site Classification

2.13 To simplify the task of making site specific recommendations we designated each of the sites using a classification relating to strategic importance. We adopted a typology broadly similar to that applied in the WS Atkins study that was agreed with the Steering Group to be logical and robust. However, for the purpose of this study we reduced the number of classifications to three in order to simplify the process of site prioritisation that would follow. Based on the following definitions, we were then able to classify each of the sites as being either major, secondary or special use sites:

2.14 Each of these classifications can be described as follows:

- **Major sites:** Sites suitable for large single occupants, major facilities or significant comprehensive development / sub-division into a number of smaller estates and plots. Size is not the primary determinant; this classification also encompasses qualitative factors such as strategic location in relation to other developments.

- **Secondary sites:** Moderately sized sites suitable for medium sized single occupants or comprehensive development for numerous occupants. Size is not the primary determinant as qualitative factors were considered.

- **Special uses sites:** Sites with some unique characteristics, which imply limited demand but could be suitable for sector specific occupants. Such sites could range in scale and are classified primarily by proximity / potential for sector specific use.

Constraints assessment

2.15 Having classified each of the employment sites according to their strategic importance we undertook an exercise aimed at assessing the level of prevailing constraints to development.

2.16 We undertook a programme of research to understand the level of constraint to development occurring at each site. The objective of this task was to analyse the ease with which sites could be brought forward for development and to provide an indicative view on whether public sector intervention would be needed to facilitate delivery.

2.17 The constraint criteria to assess the sites were developed in consultation with the client and with an understanding of over-arching public sector policy objectives. The final list of criteria is shown below:

- **Access:** Does the site benefit from good direct access? Is it close to major / regional road network?

- **Physical constraints:** Is there any existing development on site that would need to be demolished? Is the site low-lying and likely to be susceptible to flooding? Is the site level or is there a gradient?

- **Existing site infrastructure:** Is the site likely to be served by mains water / foul water systems, electricity, gas, roads etc?

- **Sustainable transport / access to work force:** Is the site in close proximity to a large resident population? How well does the site's location correspond to the compact city concept?

- **Visibility:** Is the site visible from major or local roads? Is the site in a prominent location?

- **Need for remediation:** Do known previous uses on site suggest that clean up and remediation works could be required?

2.18 Each of the sites was then scored against these criteria on a scale of 1 to 3. In this scale, 3 was the highest score and 1 was the lowest. For example where sites scored highly i.e. had good access or had few physical constraints, they were awarded 3 points, and where sites scored poorly i.e. had a lack of existing infrastructure or poor visibility they were awarded 1 point. Table 5.4 illustrates the results of this exercise.

2.19 Having scored each of the strategic employment sites according to the level of constraint to development, each site was classified according to overall level of constraint based on the total of their scores for each constraint category. These classifications were based on the following:

- Sites that scored well (15 and above) are classified as least constrained.

- Sites that recorded a moderate score (12,13 or 14) are classified as moderately constrained.

- Sites that scored poorly (11 and below) are classified as heavily constrained.

2.20 It must be noted that this was a quantitative exercise. The individual site pro-forma provide a more representative indication of the level of constraint as they contain qualitative details that could not be accounted for in this exercise.

Economic analysis

2.21 In order to make recommendations on the types of uses for which demand may exist, we undertook a detailed sectoral economic baseline exercise.

2.22 This part of the study, constituting section four of the report, analysed a variety of economic indicators for the County of Norfolk and its Districts. The indicators included in the baseline were as follows:

- Population and workforce

- Gross Value Added (GVA)

- Employment

- Unemployment

- Skills

- Business Profile

2.23 In addition to this, the most substantive part of the exercise was focussed on understanding in detail, the historic sectoral employment trends occurring in each of the Districts. To do this, we looked at trends occurring in broad industrial sectors as defined by NOMIS and trends occurring in the key sectors / clusters highlighted in the Shaping the Future Economic Strategy for Norfolk.

2.24 By understanding these growth trends we were able to make indicative assumptions about the implications on demand for different types of employment land and property. For example, strong historic employment growth in the financial services sector is likely to mean corresponding demand for A2 and B1 type land and property, and if the economic trend endures, this demand will continue to be strong. We understand that this exercise was largely abstract and based on historic statistical sources. In order to provide more up-to-date, local detail relating to the immediate surroundings of each of the sites, we asked Economic Development Officers from the Norfolk Districts to supplement our statistical findings.

Outputs

2.25 The first output, presented in Section Five draws on the findings of the work streams outlined above and details those sites which are capable of being delivered in the short, medium and long term.

2.26 The second substantive output provides advice on the potential uses and delivery issues for a selection of sites that were considered significantly constrained and unlikely to be delivered without public sector intervention. These delivery outputs are presented in the individual strategic employment site pro-forma in **Appendix D**.

3 Literature Review

Introduction

3.1 The following section is intended to provide an overview of the various economic strategies and planning policy documents directly affecting the County of Norfolk. We have included a review of documents from the national, regional and local level and structured the section along these lines. For each document we summarise the implications of relevant policies on employment land and what they are likely to mean for strategic employment sites throughout Norfolk.

3.2 The planning policies we have reviewed are as follows:

- PPG 4: Industrial, commercial development and small firms [ODPM]
- Regional Planning Guidance for East Anglia , RPG6, 2000 [Government Office for the East of England, November]
- Draft Regional Spatial Strategy for the East of England, RSS14 [Government Office for the East of England]
- Norfolk Structure Plan, 1999 [Norfolk County Council]

3.3 The relevant economic strategies we have reviewed are as follows:

- Regional Economic Strategy for the East of England, June 2001 [EEDA]
- Draft Regional Economic Strategy for the East of England, May 2004 [EEDA]
- Shaping the Future Strategy, Economic Development for Norfolk 2001-2010 [Shaping the Future Partnership]

National

Planning Policy – PPG4, Industrial, commercial development and small firms

3.4 PPG4 provides guidance on how planning can help to achieve one of the Government's key aims, to encourage continued economic development in a way that is compatible with its stated environmental objectives. Its main objective is to ensure the combination of economic growth and a high quality environment.

3.5 PPG4 recognises that industry and commerce have always sought locational advantage in response to various external factors. These include: the demands of customers; access to raw materials and suppliers; links with other businesses; the workforce catchment area; and various transport considerations. Therefore business often gives high priority to good access to roads, and sometimes rail, airports and ports. The locational demands of businesses are therefore a key input to the preparation of development plans.

3.6 The guidance states that the preparation of development plans provides an opportunity to encourage new development in locations that minimise the length and number of trips, especially by motor vehicles and encourage new development in locations that can be served by more energy efficient modes of transport. Locational policies in development plans can help to achieve that objective through reducing the need to travel, and encouraging development in areas that can be served by more energy efficient modes of transport, such as rail or water.

3.7 PPG4 states that it is now generally recognised that it may not be appropriate to separate industry and commerce -especially small-scale developments- from the residential communities for which they are a source of employment and services. In areas that are primarily residential, development plan policies should not seek unreasonably to restrict commercial and industrial activities of an appropriate scale, particularly in existing buildings, which would not adversely affect residential amenity. It is preferable for buildings to be used appropriately than to stand wholly or partially empty.

3.8 This objective of achieving sustainable patterns of development, balancing residential and employment needs, is particularly important to the development planning agenda given the weight attached to promoting sustainable development at all levels. Accordingly, this objective has been given significant weight in our analysis.

3.9 PPG4 contains a specific section on the re-use of urban land, which will apply to a number of sites identified in this study. It states that many urban areas contain large amounts of land, once used for industrial purposes but now under-used or vacant. Restoring this land to beneficial use is important to the regeneration of towns and cities. Optimum use should be made of potential brownfield sites and existing premises in inner cities and other urban areas, taking into account such factors as accessibility by public transport, particularly in the case of labour-intensive uses. Local planning authorities should identify such areas and indicate their appropriate alternative uses, including industrial and commercial uses, in their development plans, keep up-to-date details on available sites, and provide information about them to potential developers.

Regional: The East of England

Economic Policy - Regional Economic Strategy 2010 – Prosperity and Opportunity for All

3.10 The Regional Economic Strategy was prepared by EEDA and published in 2001. It formed the framework and the focus for the economic development of the East of England for the ten years 2001-2011. The main goal of the Strategy is to make the East of England one of the top 20 regions in Europe by 2010 whilst incorporating principles of sustainable development.

3.11 The document outlines a number of strategic priorities, which EEDA will pursue in order to fulfil its main goal. The strategic priorities with direct relevance to this study are listed below:

- **Competitive businesses and organisations for a world class region:** The East of England must provide an environment in which existing businesses prosper and grow, new businesses are established and the full potential of individuals and businesses throughout the region is realised.

- **Leading edge infrastructure and high-quality environment:** An innovative approach to infrastructure design and investment – in transport, land and buildings, ICT, and a good supply and variety of quality housing – will support business competitiveness while adding value to the quality of life and environment of the East of England.

3.12 In its consideration of the provision of leading edge infrastructure and a high quality environment, the RES highlights that allocating and bringing forward appropriate sites for business activity is a vital component of meeting the needs of the economy. It states that the first step in this process is to improve the information base and to map the quantity and quality of land for development and its suitability to the needs of modern businesses. Previously developed or brownfield land is specified as a priority location for new development and is appropriately outlined as a target in EEDA's Corporate Plan. This study will play an important part in furthering these objectives in the Norfolk area and help guide agencies such as EEDA on its role for intervention in brownfield sites.

Draft Regional Economic Strategy – Progressing a Shared Vision

3.13 The draft RES was released for consultation during May-July 2004 and will replace East of England 2010: Prosperity and Opportunity for all, described above.

3.14 The strategy states that the quality of life of all who live and work in the East of England can be improved using the principles of sustainable development, urban renaissance and rural vitality; equality and diversity; and regional leadership, coherence, and cohesion in the goals and priorities pursued.

3.15 The strategy outlines eight strategic goals, each of which have a number of action oriented priorities. The strategic goal that covers issues relating to employment land is goal four; High Quality Places to Live and Work. It encompasses the following priorities:

- Ensuring a high quality supply of business land and premises
- Enabling renaissance and regeneration of the region's communities
- Developing and supporting local mechanisms for implementation and delivery.

3.16 The most relevant of these priorities; ensuring a high quality supply of business land and premises includes a direct recommendation for action. It states that it is important to retain existing employment sites where possible and only sites that no longer meet regeneration and growth objectives should be made available for alternative uses.

3.17 The draft RES recognises that as part of the statutory planning process, there is a need to identify key land use issues including strategic employment sites to provide a choice of employment locations of a quality and quantity that reflect business needs. The scale of employment site provision and job growth should meet the needs specified in Draft RSS14. This provision must recognise the needs of different sectors and clusters including knowledge based activities adjacent to the region's HE and other research centres. There are a number of employment sites throughout Norfolk where our analysis has made specific reference to this last point for example the Norwich Research Park.

Planning Policy – Draft RSS14

3.18 Draft Regional Spatial Strategy 14 (RSS 14) sets out the regional planning guidance for the expanded East of England region to 2021. The 'banked' RSS14 has been supplemented by proposed changes to the document. The RSS notes that for the region to accommodate its development needs in an environmentally acceptable and sustainable way, existing trends need to be modified. Developments for housing, jobs and services will need to be much more closely integrated with each other and much more closely related to sustainable transport provision. The main urban centres will need to play a major role in accommodating growth and good access to public transport will be necessary.

3.19 The main policy (relating to the entire region) setting out guidance on employment generating development, Policy E3 states:

Local Development Documents will allocate employment land to provide a range of sites and premises to meet the quantitative and qualitative needs of business within the sequential approach of the core spatial strategy, and job growth targets enabling urban renaissance, economic regeneration, social inclusion and rural diversification. Where development proposals and issues cross local authority boundaries this approach will be developed and applied across the whole urban or development area. Efficient use will be made of existing employment land resources. Land in employment use will be considered for alternative uses only where a completed employment land assessment demonstrates that sufficient land is available, of an appropriate type, range, quality and quantity, to ensure that the Regional Economic Strategy's objectives are achievable.

3.20 RSS 14 identifies three sub-regions that fall inside the study area of this project: Norwich, Great Yarmouth and Lowestoft and Kings Lynn. The planning guidance outlines key issues and recommendations for each sub-region. These are summarised below.

Norwich Sub-Region

3.21 Under Policy NSR 1: Promoting Clusters and Strategic Sites, RSS 14 states that strategic employment sites will be identified in Local Development Documents and allocations will be protected from non-employment uses. It describes the following strategic locations as particularly significant for the future development of the Norwich sub-region:

- Norwich City Centre – providing a focus particularly for media and creative industries, finance and insurance and ICT

- Business parks and research parks to the east, north-east and west edges of Norwich, where significant expansion will be required for business, R&D, higher education and hospital related uses

- Norwich International Airport – land will be identified to accommodate uses that would benefit from an airport related location

- Sites facilitating high tech development in the A11 corridor, particularly around Wymondham, Attleborough and Snetterton (with the additional possibility of distribution uses taking advantage of the rail head).

3.22 In supporting text accompanying Policy NSR 1, RSS 14 states that existing and emerging clusters/sectors to be supported and promoted in the sub-region are media and creative industries, finance and insurance, ICT, energy (including renewable energy), advanced engineering (including high performance motorsport), environmental economy, plant biotechnology, education and tourism.

Great Yarmouth and Lowestoft Sub-Region

3.23 Policy GLY 1: Economy and Regeneration states that relevant Local Development Documents and other strategies will:

- Develop and support existing sectors including food processing, energy, port, transport and tourism

- Promote radical change in the economy by building on the sub-region's attributes

- Encourage an urban renaissance in core areas by identifying priority areas and projects for brownfield redevelopment in order to achieve economic, physical and social regeneration in inner urban areas, in particular, taking advantage of key waterfront sites in both towns.

3.24 RPG 14 identifies the following strategic locations as being of particular importance in achieving the proposals outlined above:

- Business parks and employment sites in South Gorleston and the Ness Point area of Lowestoft, to provide a focus for innovation in the energy sector;

- South Denes/East Port area of Great Yarmouth, for urban regeneration and port related activities; and

- Lake Lothing area of Lowestoft, for maritime and leisure industries, offshore wind energy and electronics.

King's Lynn Sub-Region

3.25 The vision for the sub-region is focussed largely on the urban area of King's Lynn. Without highlighting specific sites, it identifies the following priorities:

- To have a strong and diverse employment base, building on King's Lynn's strengths in engineering and food; providing high quality and well paid jobs

- To maintain a skilled and adaptable workforce

- To become primary retail, leisure and cultural centre serving the populations of western Norfolk, North Eastern Cambridgeshire and South East Lincolnshire

- To be a short break visitor destination built around King's Lynn's heritage and natural environment

- To tackle social exclusion, including that arising in the sub-region's rural communities.

3.26 Policy KL 2: Exploring Growth of the King's Lynn Urban Area states that studies will be carried out to examine a potential step change in the delivery of housing and employment growth (within supporting infrastructure) for a period up to 2021.

County / Sub-Regional – Norfolk

Economic Policy- Economic Development Strategy 2001-2010 – Shaping the Future

3.27 The Shaping the Future Strategy is the economic development strategy for Norfolk for 2001-2011. The Shaping the Future Partnership was formed in 1997, bringing together the private, public and voluntary sectors to work together to improve the performance of the Norfolk economy. The shared vision for the Norfolk economy in 2010 is:

For Norfolk to have a distinctive economy, characterised by innovative and dynamic businesses, where people are skilled and motivated with the opportunities to maximise their potential in a high quality environment

3.28 The practical implications of this vision would mean that by 2010 Norfolk would be a County that has a reputation for business excellence and innovation with strong clusters of related businesses. It will have a high rate of new business formation and have land and premises available to meet the needs of businesses. The Norwich Research Park is mentioned specifically with the aspiration that it should be the premier location for plant-bio and food related R&D activity in Europe.

3.29 The strategy identifies nine key clusters / sectors, the performance of which will largely determine the extent to which all of the County's targets are met (listed below). Our analysis of employment growth gives specific focus to these sectors / clusters.

- Agriculture and food processing

- Boat building

- Business and financial services

- Creative industries

- Energy
- Engineering and electronics
- Health and life sciences
- Information and communications technology
- Tourism.

3.30 Six strategic priorities were developed for the County which are underpinned by clear aims and objectives. The priority with the most direct relevance to this study is as follows:

To develop a high quality infrastructure, partly by making effective use of the County's land and premises in order to address the other Strategic Priorities. This will be achieved through making effective use of the County's land and premises in order to and by bringing forward strategic employment sites in a phased programme and by improving the provision of managed workspace schemes.

Planning Policy – Norfolk Structure Plan, 1999

3.31 The Norfolk Structure Plan outlines the strategic land use framework for Norfolk. All policies in the Plan are linked to the promotion of sustainable development, which includes promoting the re-use of previously developed land.

3.32 Policy EC.3: New Employment Development states that

A sufficient quantity of employment land will be identified to provide a range of quality of sites to meet the needs of inward investment, new businesses and existing businesses wishing to expand or relocate, and which:

- *Aid urban regeneration*
- *Are located so as to reduce the need to travel, particularly by private car*
- *Maintain a range of types and sizes of premises*
- *Allow distribution and warehousing activities to access transport interchanges, which provide opportunities to use the strategic rail network and water transport.*

Existing and allocated employment sites will be safeguarded from other development, which would undermine these aims.

3.33 Policy EC.2 Main Settlements for Economic Development, goes on to outline the major locations for economic development over the plan period.

The major locations for economic development will be in the Norwich Policy Area and at Great Yarmouth, King's Lynn, Thetford and Dereham.

Employment growth will also be encouraged at the towns of Attleborough, Aylsham, Cromer, Diss, Downham Market, Fakenham, Harleston, Holt, Hunstanton, Loddon, North Walsham, Sheringham, Stalham, Swaffham, Watton and Wells to improve the balance between people and jobs in the towns and their rural catchments.

In these locations support will be given to regeneration initiatives and the redevelopment of under-used and derelict land.

3.34 It is in these settlements where the guidance detailed under policy EC.3 is most likely to be applied. In considering strategic employment sites throughout Norfolk, appropriate attention has been given to potential opportunities in these areas.

4 Economic Baseline

Introduction

4.1 The following section illustrates the results of our economic analysis. The results supplement our site specific research with details of trends occurring in local sectors. The section begins with a summary of general economic trends occurring throughout the County. The information was taken from the 2001 Shaping the Future (STF) Strategy and our own research and encompasses the following areas:

- Population and Workforce
- Deprivation
- Gross Value Added (GVA)
- Employment
- Unemployment
- Skills
- Business Profile.

4.2 Following this, the main part of the section details the results of our sectoral employment analysis which looks at historic sectoral employment change across each of the Norfolk Districts and forecast employment change for Norfolk.

4.3 The STF strategy identifies two key issues that are likely to affect the County's ability to improve its economic prosperity:

- The skills level of the Norfolk workforce which is below that of the UK as a whole and the East of England
- The proportion of people willing to become entrepreneurs and set up their own business which is lower in Norfolk than the UK and East of England.

4.4 Although the Norfolk economy has a number of significant strengths, it is not performing as well, in comparison, as the East of England. Forecasts analysed by the STF partnership, indicate that unless the issues highlighted above can be addressed, the disparity between the Norfolk economy and that of the East of England is likely to continue to grow.

Population and Workforce

4.5 The County's total population was approximately 800,000 in 2001. 79% of the population were economically active, compared to 82% at the regional level, whilst the proportion of the population aged 16 and over which were active was only 57% (64% regionally). This pattern has been caused by a significant demographic change taking place in Norfolk, in particular the increased incidence of retired residents. For example, STF forecasts that the number of people aged 75+ in Norfolk will increase by 54% between 2000 and 2025.

Deprivation

4.6 In 2004 new and improved deprivation data was released by the ODPM. The key advantage, especially for large, rural Counties such as Norfolk is that the data was collected at the Super Output Area (SOA). This scale of data collection is smaller than the previous ward-based survey and therefore provides a more genuine reflection of deprivation in rural areas.

4.7 At the Local Authority level, none of the Norfolk Districts are in the 5% or 10% most deprived in England. However, both Norwich and Great Yarmouth are in the top 20% most deprived Districts in England based on an average of scores for all domains and Norwich was found to be the most deprived District in the East of England. Analysis at this scale however is susceptible to ecological fallacy, with average scores masking detailed local patterns.

4.8 At the level of the SOA, a more genuine picture of localised deprivation in Norfolk is revealed. Of the 5% (1,624) most severely deprived SOAs in England, eight are in Norfolk. Five of these are located in Great Yarmouth and three in King’s Lynn and West Norfolk and one of the SOAs in Great Yarmouth is the 55^{th} most deprived in England (from a total of 34,482). A further 20 Norfolk SOAs are between the 5% and 10% most deprived in England. 10 of these are in Norwich, six in Great Yarmouth and four in King’s Lynn and West Norfolk.

Gross Value Added (GVA)

4.9 Projections from the STF strategy indicate that productivity (GVA) in Norfolk is declining relative to the region. Over the period 1995-2000, the compound annual growth rate in GVA was 2.7% in Norfolk, 3.3% in the East of England and 2.6% in the UK.

4.10 One of the main reasons explaining why productivity in Norfolk has been dropping and is projected to do so into the future is strongly related to the demographic trends described above.

Employment

4.11 Total employment throughout Norfolk was approximately 350,000 in 2001, which equates to 45% of the total population. This proportion is lower than the national and regional level. Whilst there has been substantial growth in employment in the County (34% over the period 1982-2010), growth has been greater elsewhere. The comparable figure for the region, as a whole is 41%.

4.12 Projections analysed as part of the STF strategy indicate that employment growth in Norfolk will decline against the regional growth rate, thus reducing the County’s share of total regional employment. For example, Norfolk accounted for 14% of employment in the East of England in

1982, and it is anticipated that by 2010, the County's share of the regional total will have declined to 13%.

Unemployment

4.13 Based on records of unemployment benefit claimants (Jobseekers Allowance), unemployment throughout Norfolk has declined over the period 1997-2000 in line with national trends. The County level unemployment rate does however, mask trends at the local level. For example, Great Yarmouth experiences some of the highest levels of unemployment in the UK, whilst Diss and Thetford have comparatively low levels of unemployment.

4.14 The nature of employment and unemployment in Norfolk, as elsewhere, is constantly changing and the loss of important, local employers in small, rural areas is seldom visible from standard data analysis. For example, during our reporting, it was announced that RAF Coltishall in North Norfolk is going to be closed. This installation is a significant employer in and around North Walsham and its loss, without any apparent immediate replacement, is likely to have a severe negative impact on employment in the local area.

Skills

4.15 At NVQ levels 3 and 4, Norfolk's performance in educational attainment is behind the national and East of England average. At GCSE level (age 16). Norfolk's results are comparable with other Counties in the region although there is a significant fall off in achievement beyond this age.

4.16 The Norfolk Strategic Area Review (StAR), Consultation Paper (November 2004) outlined a number of other headline findings. These are as follows.

- Norfolk as three general further education colleges, one specialist college and two sixth form colleges. Around half of secondary schools operate a sixth form – either independently or as part of consortia. A number of institutions in Norfolk are innovative, strong, effective and successful and some are excellent when judged alongside national benchmarks. There is a network of institutions serving communities throughout Norfolk.

- The ways in which post 16 learning provision is organised and delivered is now inconsistent with the demands that are, and will increasingly be made of it.

- The A47 corridor offers a broad choice to learners. North and south of the A47 corridor, the picture becomes increasingly, though not entirely, that of an academic AS / A2 – i.e. level 3 – landscape. Whilst there is evidence to suggest that learners are prepared to travel considerable distances, some students either do not or cannot travel.

- There are a number of powerful demand-side challenges operating in Norfolk. These include; (I) fewer jobs requiring higher levels of qualifications when compared to the regional and national picture, (ii) a higher proportion of jobs requiring few or no skills; (iii) a culture, in some areas, of non-participation and some low levels of aspiration; and (iv) the current Key Stage Four curriculum which, as in many other areas of the country, is not meeting the needs of some learners.

- Some school sixth forms are constrained in their ability to broaden their curriculum offer because of either; (I) limited accommodation; (ii) economics and insufficient learner numbers; and / or (iii) institutional mission and purpose.

- Colleges in Norfolk have been successful in winning Centre of Vocational Excellence (CoVE) status and there are many examples of innovative ways in which the colleges are serving employer needs. The extent to which the supply of skills-related learning, and learning more generally, is meeting employer needs (locally and regionally) will come under greater scrutiny.

Business Profile

4.17 Sectorally, the Norfolk economy is characterised by having a wide range of activities and no single dominant sector. Despite steady job losses, manufacturing remains a significant employer (along with public administration).

4.18 The economy is dominated by Small to Medium sized Enterprises (SMEs) – especially micro-businesses: Over 90% of companies throughout the County employ less than 25 people, providing 25% of total employment. Larger firms (over 200 employees) account for only 1% of the total stock, but provide almost half of all the jobs.

4.19 The business start up rate in the County is the lowest in the region (25% below the East of England average). Figures for 2000 show that there was a net loss in the stock of businesses in the County of 1% compared to a net gain of 1% regionally. However, business survival rates throughout Norfolk County are amongst the highest in the Eastern region.

Sectoral Employment Analysis

4.20 The section below describes patterns of sectoral employment growth in Norfolk and its constituent Districts (Breckland, Broadland Great Yarmouth, King’s Lynn and West Norfolk, North Norfolk, Norwich and South Norfolk). It represents a summary of our research into historic growth in broad employment sectors, key sectors / clusters[1] and the industrial classifications which are used by ONS. The historic analysis covers the period 1998 to 2002.

4.21 A short summary of trends occurring within each District is given concluding with a brief description of the implications the observed trends in employment growth are likely to have on land and property.

[1] The key sectors / clusters outlined in the Norfolk Shaping the Future Strategy are Agriculture and Food Processing, Financial and Business Services, Boat Building, Creative Industries, Media & Publishing, Energy, Engineering and Electronics, Health and Life Sciences, Information Communications Technology, Public Sector, Tourism.

4.22 The data we have used for the historic analysis (1998-2002) has been obtained from NOMIS. The employment data used is provided by the ABI (Annual Business Inquiry). The ABI is an annual business survey that collects employment information.

4.23 The forecasting data we have used for the Norfolk County area was provided by Cambridge Econometrics and covers the period 2002-2012. Limitations on the availability of data meant that comparable statistics were not available for the East of England and UK. Further limitations on the availability of data meant it was not possible to analyse employment growth forecasts for individual districts. Implications for future land and property growth are therefore drawn largely from historic trends.

Norfolk

4.24 Norfolk has experienced an increase in total employment of 2% (5,590) over the period 1998-2002, a lower rate than has been recorded at the national (5%) and regional (4%) levels. Of the broad sectors illustrated in Table 4.2, five sectors have experienced significant growth: wholesale/retail trade, repair (6% or 3,684 jobs); transport, storage and communication (10% or 1,340 jobs); real estate, renting, business activities (21% or 6,662 jobs); education (32% or 6,409 jobs); and, other community, social/personal service (23% or 2,993 jobs).

4.25 Employment forecasts show that over the period 2002-2012 total employment in Norfolk will increase by 5% (17,024 jobs). Over the same period, seven sectors are forecast to experience growth in employment. The three most significant growth sectors are forecast to be other business services (20% or 7,911 jobs); health and social work (16% or 7,329 jobs); and, distribution (including retail, (9% or 6,021 jobs)).

4.26 In terms of land and property at the County level there are two significant trends which are likely to place an increased demand for employment land. These trends are the historic growth in transport storage and communications and retail/wholesale, and the historic and forecast growth in employment by business and service industries. The growth in transport storage and communications is known to have placed demand on land for B8 type uses. The growth in retail/wholesale is likely to have created demand for A1 type uses. The historic and forecast growth in employment in business services is likely to mean an increasing demand on land for B1 type uses.

4.27 However, this County level analysis is however relatively broad and does not provide an indication of which specific Districts are likely to experience the greatest demand for land and premises. The following analysis at the District level is intended to provide this detail.

Breckland

4.28 Total employment in Breckland has declined by 1% (358 jobs) over the period 1998-2002. The broad sectors illustrated in Table 4.2 that have experienced significant growth in employment were wholesale/retail, trade, repair (14% or 1,009 jobs); education (49% or 1,097 jobs); and, other community, social/personal service (23% or 336 jobs).

4.29 The key sectors outlined in the STF strategy that experienced employment growth over the period 1998-2002 were creative industries, media and publishing (17% or 82 jobs); engineering and electronics (28% or 544 jobs); ICT (37% or 68 jobs) and public sector (15% or 574 jobs).

4.30 Although Breckland experienced a net loss in employment over the period 1998-2002, the analysis of broad sectors and the STF key sectors/clusters showed that a number of industries have, and could be likely to place an increased demand on land and premises in the District in the future. The growth in engineering and electronics is likely to have created demand for B2 type land and premises. Historic employment growth in creative industries, ICT and the public sector could have placed demand on B1 type land and premises, and the growth in wholesale, retail; repair is likely to have placed demand on A1 type land uses. If the growth in engineering and electronics, ICT and creative industries and retail sectors continues into the future demand for A1, B1 & B2 land uses is likely to be sustained.

4.31 Growth in employment in engineering and electronics and therefore demand for land and premises is likely to be focussed on existing industrial areas close to transport links. The ICT and creative industries are comparatively foot-loose and difficult to plan for in spatial terms. Growth in retail employment will be focussed mainly in town centres and existing retail parks.

Broadland

4.32 Total employment in Broadland has increased by 4% (1,381 jobs) over the period 1998-2002, in line with regional growth and greater than County level growth (2%). Broad sectors experiencing significant employment growth over the period 1998-2002 include manufacturing (15% or 892 jobs); transport, storage and communication (97% or 826 jobs); education (47% or 950 jobs); real estate, renting and business activities (23% or 571 jobs); and, wholesale/retail, trade and repair (8% or 525 jobs).

4.33 Further to the positive trends in broad sectors, analysis in Broadland of the key sectors listed in the STF strategy also shows employment growth in a significant number of areas. Employment in financial and business services has increased by 29% (178 jobs); in boat building by 7% (23 jobs); in creative industries, media and publishing by 15% (89 jobs); in engineering and electronics by 49% (678 jobs); in ICT by 164% (454 jobs) and in the public sector by 37% (1,088 jobs). Strong growth in total employment throughout Broadland over the period 1998-2002 occurred alongside strong overall demand for land and property across a number of land use classes. If this historic growth in these sectors (transport, storage and communications, financial and business services, engineering and electronics, ICT etc) continues, demand is likely to remain strong for all B-class land and property.

4.34 It is assumed that due to the District's proximity to Norwich, much of the employment growth will be linked to that of the City. This is likely to mean that demand for land and property will be concentrated on Norwich City fringe areas and locations with good transport links.

Great Yarmouth

4.35 Total employment in Great Yarmouth has increased by 2% over the period 1998-2002 in line with the County but below the regional level (4%). Broad sectors that have experienced employment growth over this period are real estate, renting and business activities (21% or 710 jobs); education (58% or 688 jobs); wholesale/retail trade, repair (6% or 413 jobs); other community services (22% or 385 jobs); health and social work (7% or 377 jobs); and, manufacturing (10% or 334 jobs).

4.36 The key sectors highlighted in the STF strategy that have experienced employment growth are financial and business services with 42% growth (497 Jobs); creative industries with 50% growth (287 Jobs); engineering and electronics with 18% growth (305 Jobs); ICT with 20% growth (31 Jobs); and, public sector with 22% growth (619 Jobs).

4.37 Net increases in employment in Great Yarmouth over the period 1998-2002 are likely to have meant a strong overall demand for employment land and premises. Specific sectors that have experienced the greatest actual increases in employment are business activities / financial and business services, wholesale and retail and manufacturing/engineering and electronics. If these trends continue into the future, demand for land and premises is likely to be focussed on B1, A1 and B2 land uses.

4.38 The largely urban character of the Borough Council area will have meant that the majority of employment growth will have been and will continue to be focussed on the urban area of Great Yarmouth. The forthcoming URC with its tightly drawn boundaries is only likely to accentuate this trend with the effect of stimulating the local market.

King's Lynn and West Norfolk

4.39 Total employment in King's Lynn and West Norfolk has declined by 1% or 308 jobs over the period 1998-2002. This compared poorly to the positive growth experienced at the County and regional levels, both of which had employment growth, of 2% and 4% respectively. The broad sectors that experienced employment growth over the period 1998-2002 were mining and extraction (117% or 157 jobs); public sector which grew by 10% (571 jobs); real estate, renting and business activities (16% or 495 jobs); education (28% or 872 jobs); and, other community, social/personal services (46% or 639 jobs).

4.40 The key sectors that experienced significant employment growth over the period are financial and business services which grew by 26% (509 jobs) and ICT which grew by 28% (58 jobs). If this trend continues into the future, it could create and sustain a demand for property from B1/A2 type users. Such a trend is particularly important in relation to the office space likely to be developed as part of the NORA regeneration project.

4.41 Despite net employment loss in King's Lynn and West Norfolk, we understand that demand for land and property has remained buoyant throughout the District over the period 1998-2002.

North Norfolk

4.42 Total employment in North Norfolk declined by 3% over the period 1998-2002, which equates to the loss of 932 jobs. The District experienced the second most significant loss of employment in the County and compares particularly poorly to the positive growth experienced at the County and regional levels. Despite this, there were a number of sectors that experienced growth in employment over the period. The broad sectors that exhibited positive employment growth trends were construction (20% or 245 jobs); public sector (27% or 822 jobs); real estate, renting and business activities (12% or 249 jobs); education (50% or 991 jobs); and, other community, social/personal services (19% or 295 jobs).

4.43 The key sectors defined by the STF strategy to experience growth over the period 1998-2002 were creative industries, media and publishing and ICT. These key sectors experienced actual employment growth of 282 and 57 jobs respectively.

4.44 The net loss of employment in North Norfolk over the period 1998-2002 is likely to have created little additional demand on employment land and premises and may possibly have led to issues of oversupply. Only two market driven sectors have experienced significant employment growth in the District over the period 1998-2002; real estate renting and business activities and creative industries, media and publishing. If these trends continue, demand for land and premises is likely to be focussed on B1 type land uses.

4.45 Real estate, renting and business activities and the associated demand for land and premises is likely to be focussed on the primary urban areas such as North Walsham and Fakenham. The creative industries sector is comparatively small scale and footloose and difficult to plan for in terms of land and property.

Norwich

4.46 Norwich is the biggest centre of employment in Norfolk and drives the economy of much of the County. Of around 90,000 jobs in the District, around 50,000 are taken by employees travelling into the City from other Districts. Norwich experienced an increase in employment of 1,094 jobs over the period 1998-2002. As Table 4.2 shows, The broad sectors that exhibited employment growth over the period were construction (74% or 1,493 jobs); wholesale, retail trade/repair (8% or 1,288 jobs); transport, storage and communications (17% or 754 jobs); public sector (4% or 480 jobs); real estate, renting and business activities (31% or 3,969 jobs); education (12% or 848 jobs); and, other community, personal/social services (20% or 776 jobs).

4.47 Of the key sectors and clusters highlighted in the Shaping the Future strategy, only two experienced growth trends in total employment from 1998-2002. Agriculture and food processing experienced an increase in employment of 110 jobs whilst business and financial services experienced an increase of 1,876 jobs. The financial services industry in Norwich is particularly strong and is considered to be an economic cluster with national headquarters, spin-outs, synergies and sector specific learning opportunities.

4.48 It is difficult to make an assessment of the requirement for strategic employment land in Norwich based on these data. However, it can be said that the city is likely to remain a key regional focus for retail and office based employment in the future. Whilst there is likely to be future demand for employment land in the District, an assessment of both supply and likely demand according to guidance produced by the ODPM (2004) would need to be undertaken to define this quantitatively.

South Norfolk

4.49 South Norfolk District experienced 24% (7,148 jobs) growth in total employment over the period 1998-2002, by far the most significant increase throughout all Districts studied. This growth was due largely to the increase in the health and social work broad sector, which gained 4,795 jobs (157%). Other broad sectors that experienced growth were the public sector which grew by 51% or 1,504 jobs; real estate, renting and business activities which grew by 38% or 1,303 jobs and education which grew by 44% or 961 jobs.

4.50 A number of the key sectors identified in the STF strategy experienced significant employment growth over the period 1998-2002. These were creative industries, media and publishing which grew by 41% or 161 jobs; engineering and electronics which grew by 6% or 146 jobs; health and life sciences which grew by 16% or 4,758 jobs; and, ICT which grew by 48% or 144 jobs.

4.51 South Norfolk District experienced significant growth in employment over the period 1998-2002 that is likely to have meant a corresponding demand for land and premises. Demand from market driven sectors on A2/B1 land and property has been generated by growth in employment in the real estate, renting and business activities, creative industries and ICT sectors. Growth in the engineering and electronics sector is likely to have exerted demand for B1 and B2 type users whilst the significant growth in the health and life sciences sector will have generated demand for B1 (b) research and development, studios, laboratories, high tech users. If these trends continue into the future, demand for these B1, B1 (c), and B2 land uses is likely to continue with the emphasis on B1 use.

4.52 Growth in business and related sectors will have been focussed on appropriate space and accessible locations such as the Gateway 11 Business Park at Wymondham. Sub-sectoral analysis demonstrated that growth in the engineering and electronics sector was driven by motorsport related activity. This would have been focussed around the facilities at Hethel and Snetterton. Growth in employment and related demand for land and premises in the health and life sciences sector will have been and will continue to be focussed on the Norwich Research Park at Colney.

Employment Change Forecasts 2002-2012

4.53 The following passages describe sectors that are forecast to experience employment growth over the period 2002-2012 in Norfolk based on forecasts provided by Cambridge Econometrics. The data in Table 4.3 shows actual and percentage change in employment for broad sectors of the economy as defined by Cambridge Econometrics. Because of the lack of fit between the available forecast data and the historic data, we considered it appropriate to outline a number of forecast growth sectors in their own right and not alongside incompatible historic trend information.

4.54 Total employment in Norfolk is forecast to increase by 5% (17,024 jobs) over the period 2002-2012. This percentage increase is comparable to the 5% growth (118,000 jobs) forecast by EBS at the regional level[2] over the same period and above that forecast for the UK (2.8% or 668,000 jobs).

4.55 Although the two forecast models differ somewhat, we consider this comparison to be a good reflection of trends in employment change. It clearly demonstrates that the economy of Norfolk is forecast to keep pace with its surrounding region and experience significant employment growth. Both Norfolk and the East of England look set to outperform the economy of the UK in employment terms.

Distribution

4.56 The distribution sector, including retail and wholesale activities, accounted for the largest amount of employment in Norfolk in 2002 with 18% of total employment or just under 65,000 jobs. The sector is forecast to experience considerable growth (9% or 6,021 jobs) and will maintain its position as the largest employer in 2012 accounting for 19% of total employment or 70,626 jobs. Such forecast growth, when translated into land and property, is likely to have significant implications for land and property because the sector provides only very low-density employment.

Health and social work

4.57 Health and social work represented the second largest employment sector in Norfolk in 2002 with 12% of total employment or just under 45,000 jobs. In addition, the sector is forecast to be the second strongest performer in terms of actual employment growth from 2002 – 2012 with growth of 16% or 7,329 jobs. The sector will remain the second largest employer in 2012 accounting for 14% of all employment or 52,007 jobs.

Other business services

4.58 Other business services accounted for the third largest number of jobs in Norfolk in 2002 with 11% of total employment or just over 40,000 jobs. The sector is forecast to experience the most significant actual growth of all sectors in the County with a forecast increase in employment of 20% or 7,911 jobs over the period 2002 – 2012. It will remain the third largest employment sector in 2012 accounting for 13% of all employment or 48,127 jobs.

Education

4.59 The education sector is forecast to be the fourth best performing sector between 2002 and 2012 behind business services, health and social work and distribution with a growth rate of

[2] National and regional forecasts generated by Cambridge Econometrics were not available.

12% (nearly 3,000 jobs). The sector's proportion of total employment is forecast to remain the same at 7%, which will account for 27,528 jobs by 2012.

Rest of manufacturing

4.60 The rest of manufacturing sector is forecast to experience the greatest actual decline in employment with a loss of 15% or 4,640 jobs over the period 2002 - 2012. This sector accounted for 8% of total employment in the County in 2002, a proportion that is forecast to fall to 7% by 2012. This negative trend must be seen in the broader context of decline across the manufacturing industry throughout the UK and many other advanced economies in transition towards becoming service-led or "post-industrial".

Food, drink and tobacco

4.61 The food, drink and tobacco sector is forecast to experience the second greatest actual decline in employment of all sectors over the period 2002-2012. Employment is forecast to decline in this sector by 17% or 2,207 jobs. Despite this negative trend, it is important to recognise that the sector only represented 4% of total employment in 2002.

4.62 The rural nature of Norfolk has meant that this sector has been of significant importance throughout the County in recent history. A number of large national and international food and brands are based in Norfolk. However, the sector is quickly globalising with production and processing activities increasingly taking place elsewhere, in part, enabled by increased and improved methods for transporting food-stuffs. This globalising trend has partly attributed to employment decline in the food, drink and tobacco sector.

Table 4.1: Employment Change in Key Sectors / Clusters, 1998-2002

Sector	Great Britain		East of England		Norfolk		Breckland		Broadland		Great Yarmouth		King's Lynn & W Norfolk		North Norfolk		Norwich		South Norfolk	
	Change		Change		Change		Change		Change		Change		Change		Change		Change		Change	
	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%
Agriculture and food processing	-31,653	-6	-7,039	-12	-162	-1	26	1	347	14	-78	-19	197	5	-316	-14	110	18	-446	-30
Business and financial services *	246,257	11	-8,162	-4	-3,418	-12	-929	-33	178	29	497	42	509	26	36	4	1,876	12	-227	-19
Boat building	- 4,441	- 11	- 396	- 18	- 185	- 19	-308	-100	23	7	4	2	-8	-53	121	92	1	100	-18	-51
Creative industries, media and publishing	52,282	8	571	1	-508	-6	82	17	89	15	287	50	108	20	282	64	-1,524	-31	161	41
Energy	-7,774	-6	-4,656	-43	-476	-25	1	-	-128	-99	-247	-24	-79	-37	24	10	-101	-59	53	34
Engineering and electronics	-265,840	-16	-22,692	-15	134	1	544	28	678	49	305	18	-252	-8	-424	-29	-859	-25	146	6
Health and life science cluster	204,370	11	8,689	6	-843	-3	-103	-4	-1,607	-33	30	1	-121	-3	121	6	-3,918	-62	4,758	168
Information and coms technologies (ICT)	166,425	29	9,210	14	572	21	68	37	454	164	31	20	58	28	57	34	-241	-17	144	48
Tourism	230,004	12	18,705	12	-5,218	-18	-127	-6	-750	-26	-951	-16	-970	-25	-979	-24	-754	-10	-683	-21
[Public sector]	342,762	11	25,515	9	5,660	17	575	15	1,088	37	619	22	571	10	822	27	480	4	1,504	51

Source: NOMIS, 2004

* Excludes activities aux. to insurance / pension funding for Norwich in 1998

Table 4.2: Employment Change in Broad Sectors, 1998-2002

Sector	Great Britain		E of England		Norfolk		Breckland		Broadland		Great Yarmouth		King's Lynn & W Norfolk		North Norfolk		Norwich		South Norfolk	
	Change 98-02		Change 98-02		Change 98-02		Change 98-02		Change 98-02		Change 98-02		Change 98-02		Change 98-02		Change 98-02		Change 98-02	
	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%	Actual	%
Agriculture, hunting and forestry *	6,862	12	971	11	223	10	76	9	23	11	7	7	53	10	35	12	3	30	25	10
Fishing	-5,912	-47	-764	-81	-165	-70	-8	-73	-5	-71	-34	-81	-37	-55	-68	-75	-2	-100	-11	-73
Mining and quarrying	-11,793	-16	162	5	131	9	59	116	-1	-50	-266	-26	157	117	32	14	95	244	54	100
Manufacturing	-625,451	-15	-45,797	-13	-2,817	-6	-38	-0.4	892	15	334	10	-288	-3	-856	-17	-2,704	-24	-157	-3
Electricity, gas and water supply	-1,983	-1	-3,230	-26	-305	-32	-10	-30	-131	-99	15	107	-90	-38	48	133	-184	-55	47	28
Construction	44,606	4	24,751	26	906	7	-636	-33	-22	-1	-467	-38	35	2	245	20	1,493	74	259	10
Wholesale/retail trade; repair, etc	245,304	6	28,900	7	3,684	6	1,009	14	525	8	413	6	-163	-2	-155	-3	1,288	8	767	13
Hotels and restaurants	139,326	9	10,598	8	-7,015	-28	-324	-18	-791	-34	-1,623	-31	-1,036	-30	-1,016	-29	-1,221	-20	-1,002	-34
Transport, storage and communication	141,010	10	2,400	2	1,340	10	119	6	826	97	12	1	-174	-8	-116	-11	754	17	-81	-8
Financial intermediation**	52,392	5	-12,127	-14	-5,458	-28	-121	-23	13	5	-3	-1	-127	-15	-82	-20	331	3	-104	-27
Real estate, renting, business activities	421,865	12	31,577	10	6,662	21	-635	-16	571	23	710	21	495	16	249	12	3,969	31	1,303	38
Public admin/defence; social security	-31,335	-2	-14,470	-13	-751	-5	-522	-31	138	15	-71	-4	-303	-11	-169	-15	-367	-7	542	68
Education	374,096	20	39,985	25	6,409	32	1,097	49	950	47	688	58	872	28	991	50	848	12	961	44
Health and social work	274,880	11	12,718	6	-247	-1	48	1	-1,534	-24	377	7	44	1	8	0	-3,985	-41	4,795	157
Other community, social/personal service	208,743	18	20,750	22	2,993	23	336	23	40	2	385	22	639	46	295	19	776	20	523	47
Private households with employees	0	-	0	-	0	-	0	-	0	-	0	-	0	-	0	-	0	-	0	-
Extra-territorial organisations/bodies	0	-	0	-	0	-	0	-	0	-	0	-	0	-	0	-	0	-	0	-
Total employment*	**1,189,705**	**5**	**89,578**	**4**	**5,590**	**2**	**-358**	**-1**	**1,381**	**4**	**675**	**2**	**-308**	**-1**	**-932**	**-3**	**1,094**	**1**	**7,418**	**24**

Source: NOMIS, 2004

* Excluding MAFF/DAFF agricultural data

** Excludes activities aux. to insurance / pension funding for Norwich in 1998

Table 4.3: Future Employment Forecasts, 2002-2012

	2002-2012					
	Norfolk		East of England		UK	
	Actual Change	%	Actual Change	%	Actual Change	%
Agriculture etc	-824	-9				
Mining & quarrying	-88	-5				
Food, drink & tobacco	-2,207	-17				
Engineering	-1,131	-10				
Rest of manufacturing	-4,640	-15				
Electricity, gas & water	-112	-14				
Construction	629	2				
Distribution	6,021	9				
Hotels and catering	-474	-2				
Transport & telecommunications	905	6				
Banking & insurance	-727	-5				
Other business services	7,911	20				
Public admin and defence	-606	-4				
Education	2,982	12				
Health and social work	7,329	16				
Miscellaneous services	2,054	10				
Total	**17,024**	**5**	**118,000**	**5.4**	**668,000**	**2.8**

Source: Forecasts for Norfolk: Cambridge Econometrics, forecasts for East of England and UK: Experian Business Strategies (the sectoral breakdown of Employment forecasts provided by Experian differs from that provided by Cambridge Econometrics. It was therefore not possible to provide sectoral Information for the East of England and the UK).

5 Strategic Employment Site Prioritisation

Introduction

5.1 The purpose of this section of the report is to outline the employment sites included in this study and to demonstrate the processes used to assess their strategic importance, level of constraint and local economic context.

5.2 The 1997 WS Atkins study included a total of 24 employment sites. A number of these sites remained wholly undeveloped and therefore, subject to being reassessed against the criteria agreed with the Client Steering Group, remained relevant to a new strategic employment study. Where appropriate, a number of the sites have been discounted from our analysis following consultation with the client and local stakeholders because they have progressed and are either partially or fully developed. The original 1997 WS Atkins list of sites is shown below in Table 5.1, along with justification for their exclusion from this study, where relevant.

Table 5.1: Original WS Atkins sites and reasons for exclusion

District	WS Atkins Sites, 1997	Details
Breckland	Ecotech, Swaffham	Excluded: Developed
	Brunel Way, Thetford	Excluded
	Dereham Business Park	Excluded: Developed
Broadland	St Andrew's Business Park, Norwich	Excluded: Developed
	Broadland Business Park, Norwich	Included
Great Yarmouth	White House Farm/Bure Loop	Included
	Gapton Hall Extension	Included
	South Gorleston Business Park	Included
King's Lynn & West Norfolk	British Sugar, King's Lynn	Included
	NORA, King's Lynn	Included
	Barton's Drove South, Downham Market	Included
	Hardwick Industrial Est. Extension, King's Lynn	Included
North Norfolk	North Walsham Industrial Estate Extension	Included
	Fakenham Industrial Estate (G.Edwards Road)	Excluded: Part developed
	Fakenham Industrial Estate (C. Lane)	Excluded: Part developed
	Tatterset Business Park, Sculthorpe	Included
Norwich	Former UEA Student Residents	Included
	Deal Land, Trowse	Included
	Utilities Site, Cremorne Land	Included
	Norwich Airport	Excluded: Part developed
South Norfolk	Gateway 11, Wynomdham	Excluded: Part developed
	Sawmills Industrial Estate, Diss	Included
	Longwater Employment Area, Norwich	Included
	Norwich Research Park, Colney	Included
Waveney	Beccles Business Park	Excluded: Outside area
	South Norfolk Industrial Estate Extension	Excluded: Outside area

5.3 Following this update of the original list of strategic employment sites, the client, in consultation with stakeholders from its Districts identified a number of new sites which were recommended for inclusion in this study. Before this new list was finalised, the sites that were recommended for inclusion were given a preliminary assessment to ensure that they fell within the remit of the study. This assessment involved a review of size and the overall level of constraint to development.

5.4 Sites that were considered to be too small to be strategic employment sites, or sites that were subject to little or no development constraint were excluded from our analysis. The remaining sites that would form the focus of the study are listed below with the District in which they are located in Table 5.2.

Table 5.2: New List of Strategic Employment Sites

District	Strategic Employment Sites, 2004
Breckland	RAF Watton
	Snetterton Circuit & Heath
	Thetford Business Park
Broadland	Broadland Business Park, Norwich
Great Yarmouth	Beacon Business Park (previously South Gorleston Business Park)
	Gapton Hall Industrial Estate Extension
	White House Farm / Bure Loop
King's Lynn & West Norfolk	British Sugar, King's Lynn
	Hardwick Industrial Estate Extension, King's Lynn
	NORA, King's Lynn
	St John's Business Park, previously Barton's Drove South
	The Willows Business Park
North Norfolk	General Trailer Site, North Walsham
	North Walsham Industrial Estate Extension
	Tatterset Business Park, Sculthorpe
Norwich City	Anglia Square
	Deal Ground
	Hurricane Way
	Utilities Site
South Norfolk	Longwater Employment Area, Norwich
	Lotus 60 Acres
	Norwich Research Park, Colney
	Sawmills Industrial Estate, Diss

Designation Criteria

5.5 Following the finalisation of sites to be included in the study, the next stage of work was to break this list of sites down into appropriate sub-groups. It was considered that the most appropriate way of grouping the sites would be in terms of their strategic importance and physical or locational commonalties. The sites listed above in Table 5.2, were therefore classified into three groups. The classifications reflect a simplified version of those used in the WS Atkins study. The three classifications are:

- **Major sites:** Sites suitable for large single occupants, major facilities or significant comprehensive development / sub-division into a number of smaller estates and plots.

Size is not the primary determinant; this classification encompasses qualitative factors such as strategic location in relation to other developments.

- **Secondary sites:** Moderately sized sites suitable for moderately sized single occupants or comprehensive development for numerous occupants. Size is not the primary determinant, qualitative factors such as strategic location in relation to urban areas were also considered.

- **Special use sites:** Sites with some unique characteristics which implies limited demand but suitability for sector specific occupants. Such sites could range in scale and are classified primarily by proximity to / potential for sector specific use.

5.6 Table 5.3 below outlines the classification of each strategic employment site.

Table 5.3: Site Specific Classification

Site Name	District	Classification
Broadland Business Park	Broadland	Major Site
Deal Ground	Norwich	Major Site
Hardwick Industrial Estate Extn.	King's Lynn & W. Norfolk	Major Site
Longwater Employment Area	South Norfolk	Major Site
NORA	King's Lynn & W. Norfolk	Major Site
Utilities Site	Norwich	Major Site
Anglia Square	Norwich	Secondary Site
Gapton Hall Extension	Great Yarmouth	Secondary Site
General Trailer Site	North Norfolk	Secondary Site
North Walsham Industrial Estate	North Norfolk	Secondary Site
RAF Watton	Breckland	Secondary Site
Sawmills Industrial Estate	South Norfolk	Secondary Site
St John's Business Park	King's Lynn & W. Norfolk	Secondary Site
Tatterset Business Park	North Norfolk	Secondary Site
Thetford Business Park	Breckland	Secondary Site
The Willows Business Park	King's Lynn & W. Norfolk	Secondary Site
White House Farm / Bure Loop	Great Yarmouth	Secondary Site
British Sugar Site	King's Lynn & W. Norfolk	Special Use Site / Major Site
Beacon Business Park	Great Yarmouth	Special Use Site / 2ndary Site
Snetterton Circuit & Heath	Breckland	Special Use Site / 2ndary Site
Hurricane Way	Norwich	Special Use Site
Lotus 60 acres	South Norfolk	Special Use Site
Norwich Research Park	South Norfolk	Special Use Site

Level of constraint (matrix and scoring)

5.7 Having grouped the strategic employment sites we undertook a programme of research directed at understanding the level of constraint to development occurring at each site. The objective of this task was to analyse the ease with which sites could be brought forward for development and provide an assessment of the requirement for public sector intervention to facilitate delivery.

5.8 The constraints criteria used to assess the sites were developed in consultation with the client and in the context of over-arching public sector policy objectives. The final list of constraint assessment criteria are as follows:

- **Access:** Does the site benefit from good direct access? Is it close to major / regional road network?

- **Physical constraints:** Is there any existing development on site that would need to be demolished? Is the site low-lying and likely to be susceptible to flooding? Is the site level or is there a gradient?

- **Existing site infrastructure:** Is the site likely to be served by mains water / foul water systems, electricity, gas etc?

- **Sustainable transport / access to work force:** Is the site in close proximity to a large resident population? How well does the site's location correspond to the compact city concept?

- **Visibility:** Is the site visible from major or local roads? Is the site in a prominent location?

- **Need for remediation:** Did previous uses on site mean that clean up and remediation works would be required to remove possible contamination?

5.9 The sites were then scored against each of these criteria on a scale of 1 to 3 as defined in Section Three. Having scored each of the strategic employment sites according to the level of constraint to development, each site was classified for a second time according to overall level of constraint based on the total of their individual scores. These classifications were grouped according to the following rules:

- Sites that scored well (15 and above) were classified as least constrained.

- Sites that recorded a moderate score (12,13 or 14) were classified as moderately constrained.

- Sites that scored poorly (11 and below) were classified as heavily constrained.

5.10 The results of the strategic classification exercise and constraints assessment allowed us to place each of the sites in a two-dimensional matrix (see Table 5.5) which plots the strategic importance of each site against the level of prevailing constraint to development. A summary of the results of this exercise is given below:

Major sites

5.11 Only one major site included in the analysis can be defined as least constrained. This site is the Broadland Business Park in South Norfolk, just outside Norwich. This site is a focus for office based development in the area and has all primary and secondary infrastructure installed. The site is also partially developed with occupiers including leading national firms. Consultations revealed that this site is the most popular and suitable location for high-profile occupiers and in a relatively tentative office property market, may be one of the few locations in the County where developers have sufficient confidence to consider speculative development.

5.12 There are a number of major sites that experience moderate levels of constraint to development. This group is made up of the Longwater Employment Area, Deal Ground and NORA. These major sites suffer from a level of constraint which, whilst significant may be addressed in the short to medium-term, potentially with assistance from the public sector.

5.13 The major sites considered significantly constrained include the Hardwick Industrial Estate Extension, the British Sugar Site and the Utilities Site. It is unlikely that any of these sites will come forward for development without significant investment from public agencies.

Secondary sites

5.14 A large number of secondary sites were found to benefit from few constraints to development. These sites are the Beacon Business Park, St John’s Business Park, Sawmills Industrial Estate, Thetford Business Park and Anglia Square. The majority of these sites have been “pump-primed” by either private or public funds and are relatively well prepared for future development. In the case of Anglia Square, Norwich, it is acknowledged that the scope for employment-led redevelopment will be limited. This is due to the marginal development viability of office-led schemes in central Norwich and the competition for land in this particular location from higher value uses such as retail, residential and commercial leisure. An employment-led scheme at Anglia Square will require financial support from the public sector to be viable. It is not envisaged that this group of sites will require any significant additional public sector intervention in the future.

5.15 The largest group of sites is those classified as secondary and moderately constrained. This group of sites is made up of Snetterton Circuit and Heath, RAF Watton, North Walsham Industrial Estate, Gapton Hall Extension, General Trailer Site, the Willows Business Park and Tatterset Business Park. This large group is primarily made up of those sites which are not of major regional or local strategic significance and have some constraint to development. Their lack of major strategic importance may account for the absence of public sector investment in the past.

5.16 Only one secondary site was found to be significantly constrained. This site, in Great Yarmouth (the White House Farm / Bure Loop) is unlikely to come forward for development without significant public sector intervention. The proposed URC may serve to unlock public investment in this site depending on its prioritisation amongst other projects the URC will be required to deliver.

Special use sites

5.17 One special use site was found to experience the least level of constraint to development. This site, the Beacon Business Park, has also been detailed above as a major site. It has been included as a special use site because of its high level of attractiveness to major office occupiers, possibly in the renewable energy sector, as supported by the Draft RES. This is a growing area of the regional and local economy based around the historic oil and gas activity that took place in the area and the siting of offshore wind farms around the Norfolk, Suffolk and Essex coast. This site is well placed to provide adequate employment land to progress and develop this key area of the local economy.

5.18 Four special use sites were found to experience a moderate level of constraint to development: Snetterton Circuit and Heath, the Lotus 60 Acres, the Norwich Research Park and Hurricane Way. The Snetterton Circuit and Heath and Lotus 60 acres were designated as special use sites due to their potential role in the emerging high-performance motorsport cluster. The Norwich Research Park was designated as a special use site due to its key role in the health and life sciences cluster.

5.19 All four sites have the potential to provide land and property for important parts of the local economy. However, we consider that they would not be capable of delivering development without some level of public sector support / intervention. We understand that this is now taking place at Lotus 60 Acres, where a manufacturing centre of excellence is being proposed.

5.20 The final group of special use sites, those considered to be significantly constrained only includes the British Sugar Site. The British Sugar site (also a major site) was considered to be a special use site because of the opportunity to accommodate freight transfer facilities. It is unlikely that this site could be developed by the private sector without some level of public sector intervention.

Table 5.4: Site Specific Constraints

	Site Name	Access	Physical Constraints	Existing Site Infrastructure	Sustainable Transport / Access to Work Force	Visibility	Need for remediation	Total Score
Least Constrained	Beacon Business Park	3	3	3	3	3	3	**18**
	Broadland Business Park	3	3	3	2	3	3	**17**
	Thetford Business Park	3	3	1	2	3	3	**15**
	St John's Business Park	3	3	3	1	2	3	**15**
	Sawmills Industrial Estate	2	2	3	3	2	3	**15**
	Anglia Square	3	1	3	3	3	2	**15**
Moderately Constrained	Snetterton Circuit & Heath	3	3	1	1	3	3	**14**
	North Walsham Industrial Estate	2	3	1	3	2	3	**14**
	Longwater Employment Area	3	2	2	1	3	2	**13**
	NORA	3	1	2	3	3	1	**13**
	Norwich Research Park	3	2	1	2	2	3	**13**
	Lotus 60 acres	3	3	1	2	1	3	**13**
	The Willows Business Park	3	1	2	1	2	3	**12**
	Gapton Hall Extension	2	1	1	3	2	3	**12**
	Deal Ground	1	2	1	3	2	3	**12**
	RAF Watton	2	1	2	3	2	2	**12**
	Tattersett Business Park	2	3	3	1	1	2	**12**
	General Trailer Site	2	1	2	3	2	2	**12**
Significantly Constrained	Hardwick Industrial Estate Extension	1	2	1	2	3	2	**11**
	British Sugar Site	3	1	2	1	3	1	**11**
	Utilities Site	1	2	1	3	3	1	**11**
	Hurricane Way	2	1	2	3	1	1	**10**
	White House Farm / Bure Loop	1	1	1	1	2	3	**9**

Table 5.5: Strategic Employment Site Matrix

	Least Constrained	Moderately Constrained	Significantly Constrained
Major Site	▪ Broadland Business Park	▪ Deal Ground ▪ Longwater Employment Area ▪ NORA	▪ Hardwick Industrial Estate Extension ▪ British Sugar Site ▪ Utilities Site
Secondary Site	▪ Anglia Square ▪ Beacon Business Park ▪ Sawmills Industrial Estate ▪ St John's Business Park ▪ Thetford Business Park	▪ Gapton Hall Extension ▪ General Trailer Site ▪ North Walsham Industrial Estate ▪ RAF Watton ▪ Snetterton Circuit & Heath ▪ Tatterset Business Park ▪ The Willows Business Park	▪ White House Farm / Bure Loop
Special Use Site	▪ Beacon Business Park	▪ Lotus 60 acres ▪ Norwich Research Park ▪ Snetterton Circuit & Heath	▪ Hurricane Way ▪ British Sugar Site

Historic demand for land and premises

5.21 Section four of this report outlined an economic baselining exercise that was undertaken as part of this study. The objective of this element of the study was to understand those sectors of the economy that have experienced employment growth over recent years throughout each of the Norfolk Districts. The sectors that were analysed included standard broad industrial sectors and those sectors highlighted in the Shaping the Future Strategy as being of specific importance to the local economy.

5.22 Table 5.6 below highlights those sectors that experienced trends of significant employment growth over the period 1998-2002 in each of the Norfolk Districts and relates them indicatively to their respective employment land use classes. This exercise aims to map historic employment growth based on statistical sources and identified demand, based on consultations with Norfolk County Council, against relevant land-use classes to highlight where demand for land and property has been strong in the past. Strong historic trends may also be used as an indicative guide to potential growth sectors in the short-term future.

Table 5.6: Historic Demand for Land and Premises by District

	Land Use Class			
	A1 (shops, retail warehouses)	B1 & A2 (offices)	B2 & B1c (general/light industry)	B8 (storage or distribution)
Norfolk	▪ Wholesale, retail	▪ Real estate & bus. activities ▪ ***Public sector**** ▪ ***ICT***	▪ ***Engineering & electronics***	▪ Transport, storage & comms
Breckland	▪ Wholesale, retail	▪ ***Public sector***	▪ ***Engineering & electronics***	▪ Transport, storage & comms
Broadland	▪ Wholesale, retail	▪ Real estate & bus. activities ▪ ***Bus. & financial services*** ▪ ***Public sector*** ▪ ***ICT***	▪ Manufacturing ▪ ***Engineering & electronics***	▪ Transport, storage & comms
Great Yarmouth	▪ Wholesale, retail	▪ Real estate & bus. activities ▪ ***Bus. & financial services*** ▪ ***Creative industries*** ▪ ***Public sector***	▪ Manufacturing ▪ ***Engineering & electronics***	
King's Lynn & West Norfolk		▪ Real estate & bus. activities ▪ ***Bus. & financial services*** ▪ ***Creative industries*** ▪ ***Public sector***		
North Norfolk		▪ Real estate & bus. activities ▪ ***Creative industries*** ▪ ***Public sector*** ▪ ***Health & life science: B1 (b)***	▪ ***Boat building***	
Norwich	▪ Wholesale, retail	▪ Financial intermediation ▪ ***Bus. & financial services*** ▪ ***Public sector***		▪ Transport, storage & comms
South Norfolk	▪ Wholesale, retail	▪ Real estate & bus. activities ▪ ***Creative industries*** ▪ ***Health & life sciences: B1(b)*** ▪ ***Public sector*** ▪ ***ICT***	▪ ***Engineering & electronics***	

*Text in bold & italics indicates those sectors highlighted in the Shaping the Future Strategy

Final site assessment and prioritisation

5.23 The paragraphs below outline how, in the future, the strategic employment sites analysed in this study might be prioritised by local agencies. It is based on our interpretation of the constraints affecting each site, qualitative issues and our understanding of the Norfolk economy and property market. It should be noted that in order to facilitate delivery, it may be necessary for development to deviate from existing allocations to include a wider mix of uses, enhancing development viability. Where appropriate, this has been shown in the individual site pro-forma in **Appendix D**. In particular, this point relates to a number of sites within Norwich District which have been subject to significant additional analysis in a concurrent report. We would recommend that the Norwich Strategic Sites Report be read in conjunction with this report in order to obtain a more detailed understanding of the issues and findings obtained.

5.24 The prioritisation of a number of sites shown below is based upon our preliminary assessment of the site's suitability for public sector intervention, drawing upon the findings of our research and experience of projects / sites elsewhere. More comprehensive recommendations would require more detailed assessment and viability appraisal.

5.25 Table 5.7 (Site Assessment) provides an overview of all of the data presented in the paragraphs above, relating it to individual strategic employment sites and including a number of indicative qualitative strengths, weaknesses and actions. The findings of this table are supplemented by the individual site pro-forma in **Appendix D**.

Sites that can be delivered for development in the short-term

5.26 We consider that the following sites are capable of being developed in the short-term and should not require any public sector intervention:

- Broadland Business Park
- Beacon Business Park
- St John's Business Park
- Sawmills Industrial Estate
- Thetford Business Park
- [3]Anglia Square[4]

[3] Whilst Anglia Square is included within this category it is important to note that this is based upon an assumption of a retail and residential led development of the site. A more comprehensive redevelopment of the Anglia Square site and surrounding land and infrastructure is likely to necessitate public sector intervention. The role of the public sector will need to be determined once the scale and extent of development, mix of uses and impact on local infrastructure has been determined.

[4] Reference should be made to the Norwich Strategic Site Study for detailed delivery recommendations relating to Anglia Square, the Deal Ground, Utilities Site and Hurricane Way.

Sites that can be delivered for development in the medium term possibly without significant public sector intervention

5.27 We consider that the sites listed below are capable of being developed in the medium term. They may require public sector intervention in order to be developed although it is difficult to assess the exact extent of this without conducting detailed development appraisals. Such work would highlight the potential costs of overcoming any constraints and the potential receipts from a variety of development options.

- Longwater Employment Area
- RAF Watton
- North Walsham Industrial Estate
- Gapton Hall Industrial Estate Extension
- General Trailer Site
- The Willows Business Park
- Deal Ground[3]
- NORA
- Norwich Research Park
- Lotus 60 acres
- Tatterset Business Park
- Snetterton Circuit and Heath

Sites that cannot be delivered without public sector intervention

5.28 The sites listed below are very unlikely to be delivered without public sector intervention. The evident level of constraint to development on each of these sites is such that, in isolation, the private sector would not be able to undertake a commercially viable development.

- Utilities Site[3]
- Hardwick Industrial Estate Extension
- British Sugar Site
- Whitehouse Farm / Bure Loop

- Hurricane Way[3]

Delivery recommendations

5.29 As requested by our Brief, we have made recommendations on the delivery of a number of sites. This advice contains information relating to method of delivery, funding sources and partners, phasing, timescales and outputs. The sites for which delivery advice has been given were agreed with the Client and are as follows:

- General Trailer Site
- North Walsham Industrial Estate Extension
- Hardwick Industrial Estate Extension
- Longwater Employment Area
- British Sugar Site
- Thetford Business Park.

5.30 Site specific delivery advice for these sites can be found in **Appendix D**. In addition to this, our concurrent work on the Norwich Strategic Sites Study, which is aimed specifically at providing delivery advice, has meant that (with agreement from both project Steering Groups), we are able to provide delivery advice for a number of sites within Norwich. These sites are:

- Anglia Square
- Deal Ground
- Hurricane Way
- Utilities Site.

5.31 Delivery advice for these sites can also be found in the site specific pro-forma in **Appendix D**.

Table 5.7: Site Assessment

Site name, location and size	Potential strengths	Potential weaknesses	Classif’	Level of constraint	L. Plan allocation	Potential local growth sectors
Broadland Business Park Norwich Broadland DC 47 Hectares (116 acres)	▪ Proximity to Norwich ▪ Key anchor occupants such as Norwich Union ▪ Recent reports of speculative development indicating strong demand market ▪ Proximity to local transport	▪ Extent to which site is “developed out” with land-hungry B8 uses, prejudicing the development of other, higher value added uses such as B1 Office	Major Site	Least constrained	B1,B2,B8	A1 Use Class: ▪ Wholesale, retail B1 Use Class ▪ Real estate & bus. services ▪ Bus. and financial services ▪ Public sector ▪ ICT B2 Use Class: ▪ Manufacturing ▪ Engineering & electronics B8 Use Class ▪ Transport storage & comms
Deal Ground Trowse Norwich CC 8 Hectares (20 acres)	▪ Significant site in single ownership ▪ Riverside location – suitable to high value residential development and leisure uses ▪ Office development at the adjacent May Gurney site has gained outline planning permission and will improve access to the area (if implemented) ▪ Proximity to city centre and Norwich railway station	▪ Flood risk ▪ Nature conservation site and presence of two protected species in adjacent land ▪ Access – expensive to solve, will need to bridge an active waterway and require co-operation / support of third parties ▪ Aggregate works and railway lines adjacent impact upon potential quality of environment	Major Site	Moderately Constrained	B1,B2,B8 and residential in the region of 1 hectare	A1 Use Class: ▪ Wholesale, retail B1 Use Class ▪ Financial intermediation ▪ Bus. and financial services ▪ Public sector B8 Use Class ▪ Transport storage & comms
Longwater Employment Area Norwich South Norfolk DC 41 Hectares (101acres)	▪ Proximity to Norwich ▪ Proximity to major local transport routes ▪ Important existing retail and leisure occupants ▪ Future housing development adjacent ▪ Proximity to Norfolk Show Ground	▪ Conditions that require any development to contribute to improvements to the site’s junction with the A47 ▪ Requirement for the electricity supply to be up-graded prior to additional development	Major Site	Moderately constrained	B1, B2, B8	A1 Use Class: ▪ Wholesale, retail B1 Use Class: ▪ Real estate & bus. activities ▪ Creative industries ▪ Health & life sciences: B1 (b) ▪ Public sector ▪ ICT B2 Use Class: ▪ Engineering & electronics
NORA	▪ This site is the District Council’s priority site for new	▪ Unclear if any funding will be left for secondary site	Major Site	Moderately constrained	Mixed use regeneration	B1 Use Class: ▪ Real estate & bus activities

Site name, location and size	Potential strengths	Potential weaknesses	Classif'	Level of constraint	L. Plan allocation	Potential local growth sectors
King's Lynn King's Lynn & W. Norfolk BC 50 Hectares (124 acres)	B1 development ▪ Significant funding has been raised for site remediation and clearance ▪ Positive externalities generated by the surrounding Nar Ouse Regeneration Area development	infrastructure for B1 uses ▪ Local services and infrastructure are at capacity, overcoming this will incur significant costs			area	▪ Bus. & financial services ▪ Creative industries ▪ Public sector
Hardwick I.E. Extension King's Lynn King's Lynn & W. Norfolk BC 27 Hectares (67 acres)	▪ This site is the District Council's priority site for new B2 and B8 development ▪ District Council is part-landowner with tri-partite agreement with 2 other landowners regarding development and contributions to infrastructure costs ▪ Success of surrounding established industrial estate	▪ Local services and infrastructure are at capacity, overcoming this will incur significant costs ▪ Requirement for new access road off the A149 represents a significant cost constraint	Major Site	Significantly constrained	B1, B2, B8	B1 Use Class: ▪ Real estate & bus activities ▪ Bus. & financial services ▪ Creative industries ▪ Public sector
Utilities Site Cremorne Lane Norwich CC	▪ Riverside location – suitable for high value residential development and leisure uses ▪ Proximity to city centre ▪ Proximity to Norwich railway station and city centre	▪ Access is limited to a level crossing and a single-lane, light-weight bridge. Access issues – expensive to solve ▪ Ground contamination previous uses. ▪ Flooding associated with the River Wensum.	Major Site	Significantly constrained	B1, B2 and B8 Power generation from renewable resources Development which makes use of the river for the transport Other uses compatible with the site's surroundings.	A1 Use Class: ▪ Wholesale, retail B1 Use Class ▪ Financial intermediation ▪ Bus. and financial services ▪ Public sector B8 Use Class ▪ Transport storage & comms
British Sugar Site King's Lynn King's Lynn & W. Norfolk BC	▪ Direct access to railway network ▪ Proximity to forthcoming Nar Ouse Regeneration Area	▪ Condition that the site must be used for freight transfer (unlikely to be implemented) ▪ Local services infrastructure are at	Major Site / Special Use Site	Significantly constrained	B1, B2, B8 with requirement for rail freight	B1 Use Class: ▪ Real estate & bus activities ▪ Bus. & financial services ▪ Creative industries ▪ Public sector

Site name, location and size	Potential strengths	Potential weaknesses	Classif'	Level of constraint	L. Plan allocation	Potential local growth sectors
47 Hectares (126 acres)		capacity, overcoming this will incur significant costs ▪ Negative externalities of adjacent uses, especially power station				
Anglia Square Norwich Norwich CC 4.3 Hectares (10.6 acres)	▪ Landowner with a history of delivering high quality urban regeneration projects ▪ Strong existing secondary retail offer ▪ Proximity to city centre and large urban population	▪ Landowner aspiration ▪ Existing architecture, design and layout is outmoded and does not integrate with surrounding urban context	Secondary Site	Least Constrained	Mixed use	A1 Use Class: ▪ Wholesale, retail B1 Use Class ▪ Financial intermediation ▪ Bus. and financial services ▪ Public sector B8 Use Class ▪ Transport storage & comms
Sawmills Industrial Estate Diss South Norfolk 22 Hectares (54 acres)	▪ High quality existing occupants ▪ Proximity to Diss railway station ▪ Proximity to Diss town centre		Secondary Site	Least constrained	B1, B2, B8	A1 Use Class: ▪ Wholesale, retail B1 Use Class: ▪ Real estate & bus. activities ▪ Creative industries ▪ Health & life sciences: B1 (b) ▪ Public sector ▪ ICT B2 Use Class: ▪ Engineering & electronics
St John's Business Park Downham Market King's Lynn & W. Norfolk BC	▪ The site's proximity to Cambridge may represent an incentive to firms looking to locate outside of the city	▪ Condition that a freight link on the site must be maintained (unlikely to be implemented)	Secondary Site	Least constrained	B1, B2, B8 with rail link requirement	B1 Use Class: ▪ Real estate & bus activities ▪ Bus. & financial services ▪ Creative industries ▪ Public sector
Thetford Business Park Thetford Breckland DC 6.6 Hectares (16 acres)	▪ Proximity to local transport routes and existing, successful industrial estates	▪ Landowner aspirations appear to be low ▪ Potential archaeology on site	Secondary Site	Least constrained	B1, B2, B8	A1 Use Class ▪ Wholesale, retail B1 Use Class: ▪ Public sector B2 Use Class: ▪ Engineering & electronics B8 Use Class ▪ Transport storage & comms
Beacon Business Park	▪ Success of Beacon Innovation Centre on site shows strong demand		Secondary Site / Special	Least constrained	Employment and residential	A1 Use Class: ▪ Wholesale, retail B1 Use Class:

Site name, location and size	Potential strengths	Potential weaknesses	Classif'	Level of constraint	L. Plan allocation	Potential local growth sectors
Great Yarmouth Great Yarmouth BC Hectares (acres)Phase 1: 8.92 hectares total – 8.12 hectares remain Phase 2: 24.28 hectares total – 24.28 hectares remain	▪ Forthcoming Great Yarmouth & Lowestoft URC		Use Site			▪ Real estate & bus activities ▪ Bus. & financial services ▪ Creative Industries ▪ Public sector B2 Use Class: ▪ Manufacturing ▪ Engineering & Electronics
RAF Watton Watton Breckland DC 23 Hectares (57 acres)	▪ Development of the site looks likely to go ahead following the submission of a revised application ▪ Favourable planning conditions		Secondary Site	Moderately constrained	B1, B2, B8 with development brief for mixed-use	A1 Use Class ▪ Wholesale, retail B1 Use Class: ▪ Public sector B2 Use Class: ▪ Engineering & electronics B8 Use Class ▪ Transport storage & comms
Tatterset Business Park Sculthorpe North Norfolk DC 25 Hectares (62 acres)	▪ Fakenham (nearby) has been designated as a growth town by North Norfolk DC ▪ Brownfield site	▪ The site is in a relatively remote location ▪ Planning conditions relating to the development of additional floorspace and need for demolition of derelict buildings	Secondary Site	Moderately constrained	B1,B2,B8	B1 Use Class: ▪ Real estate & bus. Activities ▪ Creative industries ▪ Public sector ▪ Health & life science: B1 (b) B2 Use Class ▪ Boat building
Snetterton Circuit & Heath Eccles Road Breckland DC 19 Hectares (47 acres)	▪ Recent acquisition of the circuit complex by purchaser with high aspirations for the site ▪ Proximity to motorsport organisations including Lotus and Proton ▪ Recent improvements to the A11 junction ▪ Direct access and marketability linked to being part of the Snetterton motor		Secondary Site / Special Use Site	Moderately constrained	B1, B2, B8	A1 Use Class ▪ Wholesale, retail B1 Use Class: ▪ Public sector B2 Use Class: ▪ Engineering & electronics B8 Use Class ▪ Transport storage & comms

Site name, location and size	Potential strengths	Potential weaknesses	Classif'	Level of constraint	L. Plan allocation	Potential local growth sectors
	circuit complex					
Gapton Hall I.E. Extension Great Yarmouth Great Yarmouth BC 15 Hectares (37 acres)	▪ Forthcoming Great Yarmouth and Lowestoft URC	▪ The site has been allocated for a significant period of time. Development proposals are yet come forward ▪ Landowner aspirations ▪ Pressure from environmental organisations to protect the land and the views across it	Secondary Site	Moderately constrained	B1, B2, B8 and reference to ground conditions	A1 Use Class: ▪ Wholesale, retail B1 Use Class: ▪ Real estate & bus activities ▪ Bus. & financial services ▪ Creative Industries ▪ Public sector B2 Use Class: ▪ Manufacturing ▪ Engineering & Electronics
North Walsham I.E North Walsham North Norfolk DC 25 Hectares (62 acres)	▪ Proximity to existing industrial estate ▪ Existing industrial estate adjacent is well let, showing strong local demand	▪ Requirement for a new spine/link road before development can commence, likely to incur significant costs for developer ▪ A number brownfield sites in the town centre, which would be preferable for redevelopment	Secondary Site	Moderately constrained	B1, B2, B8 with link road condition	B1 Use Class: ▪ Real estate & bus. Activities ▪ Creative industries ▪ Public sector ▪ Health & life science: B1 (b) B2 Use Class ▪ Boat building
General Trailer Site North Walsham North Norfolk DC 11 Hectares (27 acres)	▪ The site is owned by EEDA, which has strength in levering in investment ▪ Brownfield site		Secondary Site	Moderately constrained		B1 Use Class: ▪ Real estate & bus. Activities ▪ Creative industries ▪ Public sector ▪ Health & life science: B1 (b) B2 Use Class ▪ Boat building
The Willows Business Park King's Lynn King's Lynn & W. Norfolk BC 15 Hectares (37 acres)	▪ Proximity to Nar Ouse Regeneration Area development ▪ Proximity to A47	▪ Landowner aspirations are unclear ▪ Lack of site infrastructure ▪ Proximity to power station may act as a disincentive	Secondary Site	Moderately constrained	B1, B2, B8	B1 Use Class: ▪ Real estate & bus activities ▪ Bus. & financial services ▪ Creative industries ▪ Public sector
White House Farm / Bure Loop Great Yarmouth	▪ Forthcoming Great Yarmouth and Lowestoft URC.	▪ Requirement for A149 – A47 link road, providing improved access to the site, before development could commence	Secondary Site	Significantly constrained	B1, B2, B8 with access road requirement	A1 Use Class: ▪ Wholesale, retail B1 Use Class: ▪ Real estate & bus activities ▪ Bus. & financial services

Site name, location and size	Potential strengths	Potential weaknesses	Classif'	Level of constraint	L. Plan allocation	Potential local growth sectors
Great Yarmouth BC 17 Hectares (42 acres)						▪ Creative Industries ▪ Public sector B2 Use Class: ▪ Manufacturing ▪ Engineering & Electronics
Lotus 60 Acres Wymondham South Norfolk DC 24 Hectares (60 acres)	▪ Favourable planning conditions for land which is not allocated ▪ Proximity to other motorsport organisations and facilities including Snetterton Circuit, Lotus and Proton ▪ Possible support from RDA for cluster development		Special Use Site	Moderately constrained	Not allocated	A1 Use Class: ▪ Wholesale, retail B1 Use Class: ▪ Real estate & bus. activities ▪ Creative industries ▪ Health & life sciences: B1 (b) ▪ Public sector ▪ ICT B2 Use Class: ▪ Engineering & electronics
Norwich Research Park Norwich South Norfolk DC 40 Hectares (acres)	▪ Support from EEDA, STF, and local authorities ▪ Genuine cluster	▪ Landowner aspirations ▪ Competition for tenants is on a global scale ▪ Existing innovation centre is poorly let (a speculative development) ▪ Expansion will only take place on a bespoke, pre-let basis	Special Use Site	Moderately constrained	B1, R&D and high-tech	A1 Use Class: ▪ Wholesale, retail B1 Use Class: ▪ Real estate & bus. activities ▪ Creative industries ▪ Health & life sciences: B1 (b) ▪ Public sector ▪ ICT B2 Use Class: ▪ Engineering & electronics
Hurricane Way Norwich Norwich CC 2 Hectares (5 acres)	▪ Land ownership – City and County Councils ▪ Existing support from the public sector for remediation works ▪ Proximity to existing industrial uses and Norwich Airport	▪ Remediation works – demolition of present buildings and removal of asbestos ▪ Proximity to new residential development ▪ Question of viability for proposed uses	Special Use Site	Significantly Constrained	B1, B2	A1 Use Class: ▪ Wholesale, retail B1 Use Class ▪ Financial intermediation ▪ Bus. and financial services ▪ Public sector B8 Use Class ▪ Transport storage & comms

Appendices