



**HARDISTY JONES  
ASSOCIATES**

HARLOW & GILSTON GARDEN TOWN

# Strategic Economic Framework

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September 2023





# Contents



1	Introduction .....	7
2	Economic Road Map .....	9
3	Strategic Framework.....	17
4	Attract: Inward Investment.....	19
5	Develop & Grow: Business & Innovation Support .....	23
6	Accommodate: Employment Sites & Premises.....	26
7	Enable: Skills and Training .....	32
8	Retain: Community Wealth Building .....	36
9	Drive: Coordination & Capacity .....	40
10	Monitoring and Review.....	41
	Appendix 1. Policy Summary .....	44
	Appendix 2. Methodology and Results.....	47
	Appendix 3. Employment Land Supply Summary .....	60





# Foreword

by Guy Nicholson, Independent Chair, HGGT

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The Strategic Economic Framework for Harlow Gilston Garden Town (HGGT) outlines the economic growth plan for the growing community and provides a roadmap to coordinate economic development across the cross-boundary geography of the Garden Town project.

The Strategic Economic Framework has been formed to complement and enhance the adopted Harlow Economic Development Strategy 2023-28. It expands existing economic growth policies, strategies, and draws on growth research related to the HGGT area, with a specific emphasis on supporting integrated economic regeneration, delivering a balanced labour market, and ensuring that growth is both inclusive and sustainable.

The analysis has identified that from 2023 through to 2045, the Garden Town area is projected to accommodate an additional 45,000 residents; this would require the creation of an additional 23,000 jobs in order to maintain a balanced labour market and a thriving community. Growth on this scale represents a significant increase from Harlow's current employment base. Achieving this growth will demand a substantial change in delivery and ownership, it will demand increased economic development efforts from the partners and an increase in activity in the commercial property market.

The research behind the Strategic Economic Framework identifies a number of key sectors for growth across the Garden Town. These are:

- Health
- Life sciences (including medical technology)
- Technology and advanced manufacturing
- Arts, culture, and creativity
- Construction (including retrofitting)
- Transport, warehousing, and logistics
- Green industries

The primary areas of growth from the list above are anticipated in the health, construction, and education sectors. However, the Framework also identifies an expansion in subsidiary activities that include professional services, public administration, and research & development.



This Strategic Economic Framework has clearly identified six themes to enable the scale of economic growth required to realise the 2045 target. These are:

1. Attracting inward investment
2. Developing and supporting businesses and innovation
3. Providing employment sites and premises
4. Enabling skills and training
5. Promoting community wealth building
6. Coordinating and building capacity

The intention is to ensure that there are regular review points as the plan period progresses. The Framework identifies the need for an approach to future delivery that must be flexible enough to respond to markets and macro-economic changes identified through the reviews. As part of the review process a set of key performance indicators are identified that will help keep track of progress which focus on monitoring the outcomes of the six themes.

The Strategic Economic Framework is the result of a high level of collaboration between each of the five partner Authorities that make up the Garden Town area and is without a doubt a testament to the longer-term commitment to sustainable economic growth, inclusive community wealth building and deliver the wherewithal for a growing community to prosper.

# Executive Summary

## Introduction

This document sets out the required economic growth trajectory or 'road map' for Harlow and Gilston Garden Town (HGGT) and provides an action-focused strategic economic framework to coordinate economic development action across stakeholders. This has been prepared to complement the Harlow Economic Development Strategy (EDS) 2023-28, primarily addressing actions that are required at the Garden Town level.

This framework has been developed to build on and align with existing policy, strategy and research relating to the HGGT. In particular, it seeks to support the ambitions to deliver integrated economic regeneration of Harlow, enable a balanced labour market, and ensure growth is inclusive with sustainability and liveability at its core.

## The Employment Growth Challenge

Updated analysis of the planned growth trajectory of HGGT 2023-45 identifies an expected population growth of around 45,000 residents, which will require an additional 23,000 jobs across the Garden Town to maintain a balanced labour market. This is a 50% increase on the current employment base of Harlow.

The scale of growth required, over a sustained period, is around four times the historic trend. This will require a major step change in performance, the level of underpinning economic development delivery effort, and higher levels of activity in commercial property markets to accommodate growth.

There are a number of opportunities which can contribute to employment growth. Analysis undertaken in preparing this framework identifies prospects for 18,000 – 20,000 jobs over the framework period. However, this is by no means secured, and indicates that a gap of 3,000 – 5,000 jobs remains.

Figure A provides a summary of the 'top-down' growth requirement and the 'bottom-up' analysis of economic opportunities. This shows a significant gap in the period 2028-33 in particular. The scale of this gap could increase if the potential relocation of the UK Health Security Agency (UKHSA) is delayed or downgraded.

**Figure A Summary economic road map**

	2023-28	2028-33	2033-38	2038-45
	Short-term	Medium-term	Long-term (partial)	
Dwellings	4,400	7,200	4,200	3,700
Population	10,100	16,500	9,600	8,500
Top Down Jobs Need	<b>5,200</b>	<b>8,500</b>	<b>5,100</b>	<b>4,000</b>
Bottom Up Jobs Growth	4,900	6,200	4,100	4,700
Indicative Gap	300	2,300	1,000	-700



## Sector Focus

A number of priority sectors for the HGGT area have been established in research and strategy:

- Health;
- Life sciences (including med-tech);
- Technology and advanced manufacturing;
- Arts, cultural and creative;
- Construction including retrofit;
- Transport, warehousing and logistics; and
- Green industries.

Analysis of growth opportunities for this framework suggests employment growth across a broad range of sectors is likely. The three largest growth sectors are anticipated to be health, construction and education, reflecting the scale of new development, and the service demands associated with substantial growth in the population. There is also projected to be substantial growth in the professional services, public administration, and R&D sectors which relate to key target sector opportunities, including the potential relocation of UKHSA to Harlow.

The profiled growth will also start to deliver a shift towards higher wage and higher order occupational activities. However, there will continue to be employment opportunities across the occupational and skills spectrum.

## Strategic Economic Framework

The strategic economic framework has been structured around six themes as illustrated in Figure B. These themes are not mutually exclusive and will work in combination to support and deliver the growth required across the Garden Town.

**Figure B Framework summary**

<b>Attract</b>	<b>Inward Investment</b>
<b>Develop &amp; Grow</b>	<b>Business &amp; Innovation Support</b>
<b>Accommodate</b>	<b>Employment Sites &amp; Premises</b>
<b>Enable</b>	<b>Skills &amp; Training</b>
<b>Retain</b>	<b>Community Wealth Building</b>
<b>Drive</b>	<b>Coordination &amp; Capacity</b>



## **Attract: Inward Investment**

The action framework is focused on supporting a step change in employment growth across the HGGT through delivering a proactive, coordinated and consistent inward investment promotion function and securing funding to deliver the planned large-scale regeneration of the town centre. It also includes specific short-term actions around lobbying for and maximising the potential impact of the potential relocation of UKHSA to Harlow, with fall-back actions should the decision be delayed or downgraded.

## **Develop & Grow: Business & Innovation Support**

The action framework is focused on ensuring a consistent and clear business support offer across the HGGT to develop a start-up, scale-up and innovation culture, and drive an SME focused approach to economic development. This will seek to maximise the opportunities of other large-scale investments into the area, build clusters and networks around key sectors, and attract additional innovation expertise into the Garden Town.

## **Accommodate: Employment Sites & Premises**

The action framework is focused on addressing identified shortages of employment land to meet the growth ambitions of the Garden Town and ensure the planned Garden Communities deliver a meaningful employment contribution. Actions will also explore the potential for a more proactive public sector led approach to employment sites to drive change in the commercial market and support the SME and cluster focused approach to growth.

## **Enable: Skills & Training**

The action framework is focused on ensuring the skills are in place to underpin the growth ambitions, particularly for key sectors; to maximise the impact of major investment and to support the central aim of ensuring existing residents of Harlow are able to participate in the economic regeneration brought about through the Garden Town. This includes ensuring all HGGT partners support the skills and employment actions set out within the Harlow EDS 2023-28. Raising aspiration and awareness of opportunities among young people, as well as strengthening links between training providers and employers are key actions.

## **Retain: Community Wealth Building**

The action framework is focused on maximising the retained impact from the investment and expenditure made within the HGGT. This includes engagement with developers and anchor institutions as well as building capacity through SME engagement and skills development.

## **Drive: Coordination & Capacity**

This is focused on ensuring there is organisational and leadership capacity as well as sufficient resources to deliver the framework.

## **Monitoring and Review**

Monitoring and review will include a high-level annual review and adjustment as well as a major five-year review and refresh. Monitoring will include both quantitative and qualitative approaches. A headline dashboard of key performance indicators will be used to track overall progress, with theme level monitoring focused on progress against action frameworks.

# 1 Introduction

- 1.1 This document is the strategic economic framework for Harlow and Gilston Garden Town (HGGT).

## Purpose

- 1.2 The purpose of this document is to build on existing policy, strategy and evidence to provide greater clarity on the **road map** for economic growth across HGGT and to provide a **strategic framework** for stakeholder action in order to deliver that road map.
- 1.3 The road map is a tool to help understand the scale and timing of economic growth that will be required to achieve the socio-economic ambitions already set out for HGGT<sup>1</sup> over the next 20+ years, and to consider whether existing identified opportunities and employment sites provision will be sufficient to meet these ambitions.
- 1.4 The strategic framework considers actions required across a range of themes to enable the growth set out in the road map.
- 1.5 This HGGT focused document sits alongside, and shares an evidence base with the recently produced Harlow Economic Development Strategy 2023-28. This framework takes a wider perspective, encompassing the entire HGGT, which includes all of Harlow and parts of the Epping Forest and East Herts district areas, straddling the Essex and Hertfordshire county border and therefore falling within the coverage of the South East Local Enterprise Partnership (SELEP) and Herts LEP areas. There are already economic strategies across many of these geographies which are used to direct the activities of key HGGT stakeholders, but without a specific Garden Town focus.

## HGGT Ambition

- 1.6 There is a range of existing policy, strategy and evidence documents relating to HGGT (summarised at Appendix 1). These set out principles which are relevant to this strategic economic framework. In particular:
- **Integrated economic regeneration of Harlow** – significant new housing development within Garden Communities around the periphery of Harlow are clearly intended to support the economic regeneration of Harlow. This includes bringing critical mass to enable town centre redevelopment and creating an integrated sense of place rather than dormitory suburbs.
  - **Balanced community** - as part of the HGGT Employment Commission (2020)<sup>2</sup> it was agreed that HGGT should aspire to maintain a ‘balanced community’ or labour market with a broadly equal number of jobs and workers<sup>3</sup>. It is recognised that there will inevitably

<sup>1</sup> Including the HGGT Vision and Design Guide, HGGT Employment Commission, Harlow, Epping Forest District and East Herts Local Plans and recently approved planning applications for the Gilston Villages.

<sup>2</sup> Found at <https://hggd.co.uk/wp-content/uploads/2021/07/HGGT-Employment-Commission-FINAL-Report-v1.0d.pdf> (last accessed 22/06/23)

<sup>3</sup> Alternatives previously discussed included a dormitory settlement, with more workers than jobs – fuelling out commuting, or an economic hub, with more jobs than workers – fuelling in-commuting. The balanced community approach creates the conditions to enable more sustainable travel patterns. It is acknowledged that some workers will continue to choose to commute in and out but at a structural level it is important to enable balance. The recent rapid growth in hybrid working



be in- and out- commuting, but there is a desire that this remains in balance, as has been true of Harlow historically. This will be critical to both avoid HGGT becoming a dormitory town and reduce the need for unsustainable travel patterns.

- **Inclusive growth** – at the heart of economic proposals is the focus on ensuring existing residents of Harlow are able to fully participate in the growth opportunities that HGGT will deliver. This is not only critical for the economic inclusion of existing and future residents of Harlow and the wider Garden Town, but also for achieving sustainable transport ambitions. For this reason skills has been identified as a high priority within the Harlow Economic Development Strategy and is supported fully through this framework.
- **Sustainability and liveability** – the Garden City principles of walkable neighbourhoods and reducing reliance on the car to deliver more sustainable travel are at the heart of the HGGT vision, with stretching targets within the HGGT Transport Strategy. This links with the balanced community ambitions and the economic dimensions of placemaking to ensure residents have improved access to employment opportunities as well as retail, leisure and services close to home.

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will also impact on where people work on a day-to-day basis. However, the majority of hybrid workers retain a formal 'place of work' and it is therefore important that this is fully taken into account.

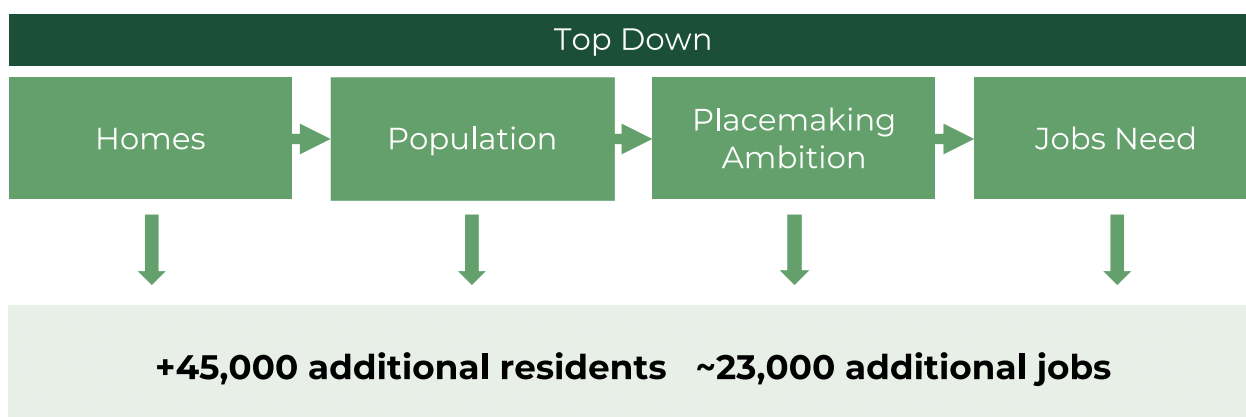
## 2 Economic Road Map

- 2.1 The strategic economic framework for HGGT needs to be driven by an understanding of both the ‘top down’ **need** for employment growth to deliver the ambitions that have been outlined for the Garden Town – enabling a balanced community aligned to proposed housing growth - and the ‘bottom up’ economic growth **opportunities** – considering how this growth might be achieved. This not only helps to understand the scale of growth that is required and how this might be achieved, but also helps to inform the priorities and actions that will be required by stakeholders to deliver this growth.
- 2.2 Appendix 2 to this strategy sets out further details on the technical modelling which underpins the summary set out in this section. The results set out below present a high-level ‘economic road map’ for HGGT over the short (2023-28), medium (2028-33), and long-term (2033-45).
- 2.3 The long-term element stretches beyond current Local Plan periods. Consideration of the long-term is helpful to ensure actions taken in the short term are appropriate and contribute to the overarching aims, rather than focusing solely on early wins and quick fixes.

### ‘Top-Down’ Growth Requirement

- 2.4 The top-down analysis builds on work set out in the HGGT Employment Commission (2020). A very similar modelling approach has been adopted. This has been updated to take account of new information on the anticipated housing trajectory and the latest socio-economic data (including the 2021 Census of Population).
- 2.5 The approach is summarised in Figure 1. Over the period 2023-45 a total of 19,500 dwellings are currently planned<sup>4</sup>. This will lead to an additional population of around 45,000 residents<sup>5</sup>, requiring approximately 23,000 additional jobs to maintain a balanced community. This equates to a need to generate 1,000+ additional jobs per annum over the long term.

**Figure 1 Top-down assessment of employment growth need**



<sup>4</sup> This figure is based on current Local Plan allocations and recently approved applications for the Gilston Villages. This figure does not take into account any wider housing needs which may be determined as part of Local Plan review or replacement processes for the period beyond 2033.

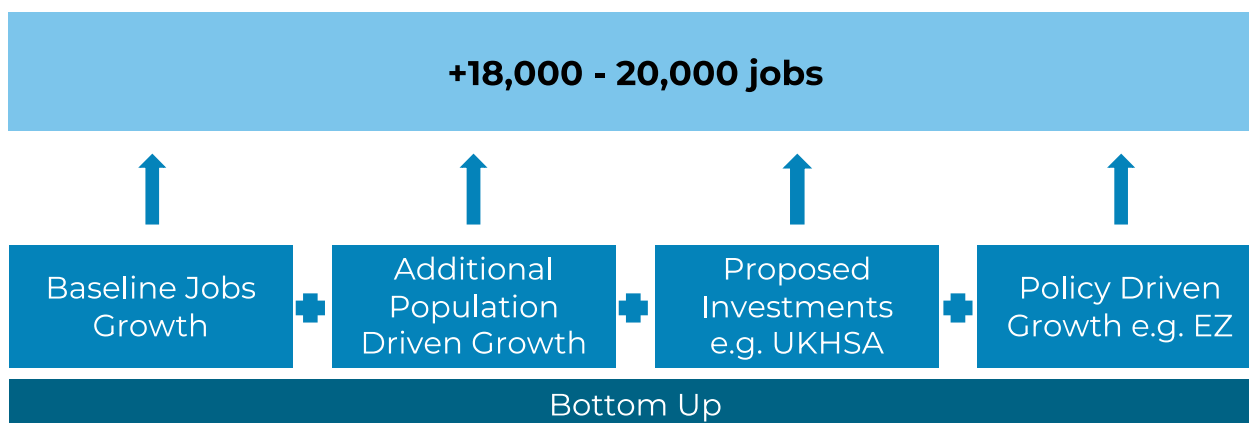
<sup>5</sup> Compared to the current Harlow population.

2.6 With this scale of growth HGGT will become a settlement of around 140,000 persons and 67,000 jobs. This is around a 50% increase on the current Harlow population and employment base. This is a notable growth in the scale of the settlement putting it into a population size-band with places such as Exeter, Cambridge, Norwich and Oxford<sup>6</sup>. These cities perform a wider function as service centres and, as a result of agglomeration effects<sup>7</sup> and other specialisms, have much larger employment counts than has been modelled for HGGT. The critical point for the Garden Town is the potential for a successful HGGT economy to develop strengths and interactions to drive further employment growth<sup>8</sup>. Harlow currently has a relatively low jobs density<sup>9</sup> given its urban character. This will need to increase to achieve the policy ambitions for HGGT.

### ‘Bottom-Up’ Growth Opportunities

2.7 The approach to developing the ‘bottom-up’ analysis is illustrated in Figure 2. This considers baseline forecast jobs growth, makes adjustment for the substantial additional population growth arising from planned new housing development (e.g. within education and health), allows for potential investments such as the proposed relocation of UKHSA to Harlow, and uplifts for wider economic development policy-driven growth such as the Enterprise Zone.

**Figure 2 Bottom-up assessment of employment growth potential**



2.8 This analysis identifies the potential for 18,000 - 20,000 jobs across HGGT. Table 1 provides a breakdown of the key components. Continued uncertainty over the potential relocation of UKHSA to Harlow leads to the range of jobs estimates identified.

<sup>6</sup> These places each have local authority boundaries closely mapped to the urban areas.

<sup>7</sup> Agglomeration effects refer to the economic benefits gained when businesses and industries cluster together in a specific geographical area. These can include productivity gains, increased innovation activity, additional job creation, improved knowledge and skills accumulation and attraction of additional infrastructure and amenities; all of which can underpin increased levels of economic development.

<sup>8</sup> Towns and cities with a similar scale employment base include Worcester and Cheltenham. These places both have lower total populations than is projected for HGGT further confirming the potential for agglomeration effects.

<sup>9</sup> Jobs density represents the ratio of total jobs to population aged 16-64. In comparison to other post war New Towns in England for which data is easily available Harlow has the lowest jobs density save for Redditch.

**Table 1 Potential Components of Bottom-Up Jobs Growth**

Component	Indicative Jobs Growth
Baseline	11,000
Additional population driven	4,000
Proposed UKHSA related	2,000
Economic development policy driven	2,500
<b>Total (with UKHSA)</b>	<b>20,000</b>
<b>Total (without UKHSA)</b>	<b>18,000</b>

Source: HJA Analysis. Figures rounded for ease of interpretation.

- 2.9 On this basis there remains a gap of around 3,000 – 5,000 jobs to meet the identified requirements from the top-down analysis and meet the needs of the increased working age population. This will require either additional inward investment, or further growth in existing or new start-up businesses within the Garden Town. As the HGGT grows this gap may be filled through agglomeration effects, as clusters of activity form and success breeds success as well as improved connectivity following the recent completion of M11 Junction 7a.

### Potential UKHSA Relocation to Harlow

The former GSK site in Harlow has been identified as a suitable location to accommodate the agency, with a range of functions including science and administration activities identified for potential relocation. Preparatory works at the site have been underway for some years.

The final investment decision has been subject to delays for various reasons, with the Covid-19 pandemic leading to substantial organisational restructuring within the public health sector. The final business case for the relocation is due for submission and consideration at the time of preparing this economic framework.

The scale of any relocation is currently uncertain. The final investment decision will include determination of which functions (if any) are relocated to Harlow. The latest information made available to local stakeholders is that the scale of the relocation (in terms of total jobs) is likely to be smaller than initially proposed.

If the relocation decision is approved, this provides a major opportunity for Harlow helping to establish its role as a key hub at the centre of the UK Innovation Corridor. The investment has the potential to kick start growth, not only through the direct relocation of job roles, but also through a range of indirect and induced effects within the supply chain, and as a result of major construction activity. UKHSA provides a potential focal point within the health and life sciences sector around which further clustering activity can happen.

If the relocation process does not proceed, a different approach will need to be taken. The GSK site will remain a prime opportunity location for the economic development of the wider HGGT, and appropriate actions to drive high-quality employment growth will need to be pursued. This economic framework therefore provides the flexibility to adapt to the potential outcomes of the UKHSA investment decision making process.

## Phasing (Road Map)

- 2.10 Figure 3 sets out the phasing of the top-down and bottom-up analysis across the short-, medium- and long-term time periods. This also highlights where gaps remain.
- 2.11 It is important to recognise that the bottom-up jobs growth is neither certain nor secure and will require substantial effort to deliver and flexibility to respond to opportunities that are presented.
- 2.12 Figure 3 suggests the largest requirement and the largest gap fall within the 2028-33 period. However, there is a degree of uncertainty over timing, particularly with the potential UKHSA relocation. In the event the UKHSA relocation is delayed or downgraded, the gap in the period 2028-38 could increase markedly.
- 2.13 It is also appropriate to take account of the potential for new residents of HGGT to move from locations such as London whilst retaining their existing jobs (at least in initially). Over time these new residents may choose to work closer to home, so deferring some of HGGT jobs needs towards the longer-term. Deferral of some of the local jobs requirement will allow more time to put in place the foundations which can stimulate the agglomeration effects.
- 2.14 Even if the identified gaps in the short and medium term can be deferred, this will still require substantial jobs growth across the next 10-years, well above anything experienced in Harlow over the past 20 years. Therefore, it is vital that there is rapid mobilisation of efforts to deliver actions to support growth and to secure quick wins<sup>10</sup>.

**Figure 3 Balancing need and opportunity (including UKHSA relocation)**

	2023-28	2028-33	2033-38	2038-45
	Short-term	Medium-term	Long-term (partial)	
Dwellings	4,400	7,200	4,200	3,700
Population	10,100	16,500	9,600	8,500
Top Down Jobs Need	<b>5,200</b>	<b>8,500</b>	<b>5,100</b>	<b>4,000</b>
Bottom Up Jobs Growth	4,900	6,200	4,100	4,700
Indicative Gap	300	2,300	1,000	-700

Source: HJA analysis (figures may not sum due to rounding)

## Growth Challenge

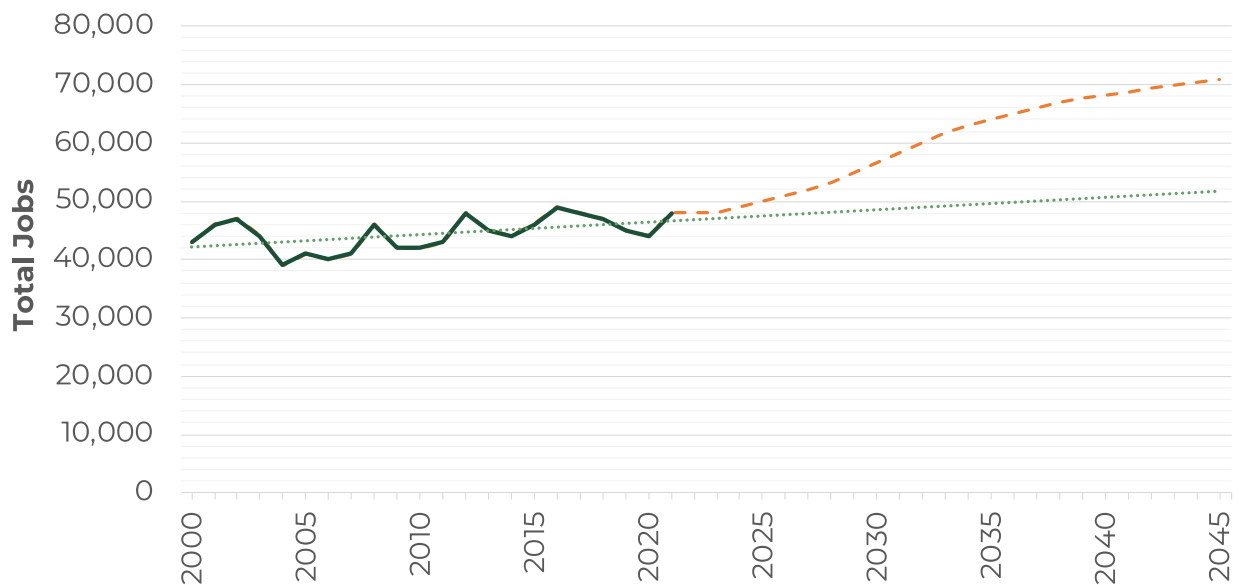
- 2.15 Delivering 23,000 jobs across HGGT over 23 years is a significant level of growth. As noted above this is around a 50% increase on current levels, which will lead to a step-change in the size of the local economy.
- 2.16 This scale of growth is a substantial challenge in comparison to the historic jobs growth performance of Harlow. Figure 4 illustrates historic employment growth in Harlow over the period 2000-2021 (dark green line). This shows an upward trend (pale dotted line) despite

<sup>10</sup> A failure to deliver the required scale of jobs growth, with fixed housing growth, will lead to an increasing level of dormitory status.

some volatility in the data<sup>11</sup>. However, the scale of growth over the last 20 years is well below the levels required to achieve future policy ambitions (orange dashed line). Around 5,000 additional jobs were created in Harlow between 2000-2021, equivalent to approximately 250 jobs per annum, around 25% of the level of growth that will be required across HGGT over the next 20 years. In short, the Garden Town needs to achieve jobs growth in the first five years of this framework period of the same scale that has been achieved in the last 20 years across Harlow.

- 2.17 These figures clearly demonstrate that future employment growth will need to be on a totally different scale to that achieved in the past, and will require a concerted effort to attract and grow businesses to deliver this growth. Given historic performance, the level of focus on securing growth will need to be substantially scaled up.
- 2.18 The potential relocation of UKHSA provides a possible quick win and could be a key driver for indirect opportunities, however, this is not a panacea. There will still be a need for major additional growth to be secured. If the relocation is aborted, then this need is increased.

**Figure 4 Historic and forecast employment growth in Harlow/HGGT 2000-2045**



Source: ONS Jobs Density/Total Jobs via NOMIS and HJA modelling

## Sector Mix

- 2.19 The analysis set out above has focused on the quantitative need to deliver an overall balanced labour market as development across HGGT takes place and the population grows. The quality of growth is also critical. The Garden Town needs to offer opportunity across the wage and occupational spectrum so that existing residents of Harlow and the future residents of HGGT can find suitable employment and grow, develop and progress in a career.

<sup>11</sup> At local authority level many socio-economic statistics can be volatile, partly due to the fact that individual business closures and openings can have a marked impact on a local employment base, as well as the impact of statistical sampling errors.

2.20 A number of priority sectors have been identified in research and strategy for the HGGT area. These form part of the Harlow EDS and are fully relevant to this economic framework. These include:

- **Health** – this is a large and growing sector and has strong growth potential related to the growing population of the Garden Town, the general ageing of the population, and the replacement Princess Alexandra Hospital;
- **Life Sciences (including med-tech)** – this has historically been an important sector for Harlow and has huge potential with the proposed relocation of UKHSA to the Garden Town and the wider opportunities of the UK Innovation Corridor with proximity to London and Cambridge. This sector has been identified by Essex County Council as a significant specialism for Harlow and official data shows scientific research and development has been one of Harlow’s fastest growing employment sectors in recent years. There is potential to strengthen links across the health, life sciences, med tech and digital sectors.
- **Technology and Advanced Manufacturing** – Harlow has a number of significant businesses in these sectors generating high-value employment opportunities and with the potential to grow, and stimulate wider development within the sector;
- **Arts, Cultural and Creative** – the town has a number of assets to support the further growth of this sector, which formed the basis for the successful recent Levelling Up Fund bid. These sectors are vital to making HGGT a more attractive place to live, work and visit;
- **Construction and Retrofit** – Harlow has a large and growing construction sector, particularly for specialised construction trades. With the scale of planned growth across the HGGT there is significant expansion opportunity, as well as the huge need for retrofit activities to support the transition to net zero;
- **Transport, Warehousing and Logistics** – this sector shows a high concentration in Harlow and has been growing strongly in recent years. The strategic location and access of HGGT is a key attractor; and
- **Green Industries** – as well as retrofit and energy efficiency there are major growth opportunities arising from the transition to net zero and adaptation to climate change. Primarily this reaches across renewable energy, sustainable transport, waste management and sustainable agriculture. However, there will be opportunities across all sectors for new technology and processes to aid society’s adaptation, this will include Harlow’s existing strengths in life sciences and med-tech.

2.21 These include activities within the high value and ‘tradeable’ economy<sup>12</sup> as well as sectors which form part of the ‘foundational’ economy<sup>13</sup>, ensuring HGGT can meet the needs of its residents with high quality local services. Both elements will be vital to the future economic and social development of the Garden Town.

2.22 The modelling set out at Appendix 2 provides an indication of the potential sectoral breakdown of future employment growth. This is illustrated in Figure 5. It shows:

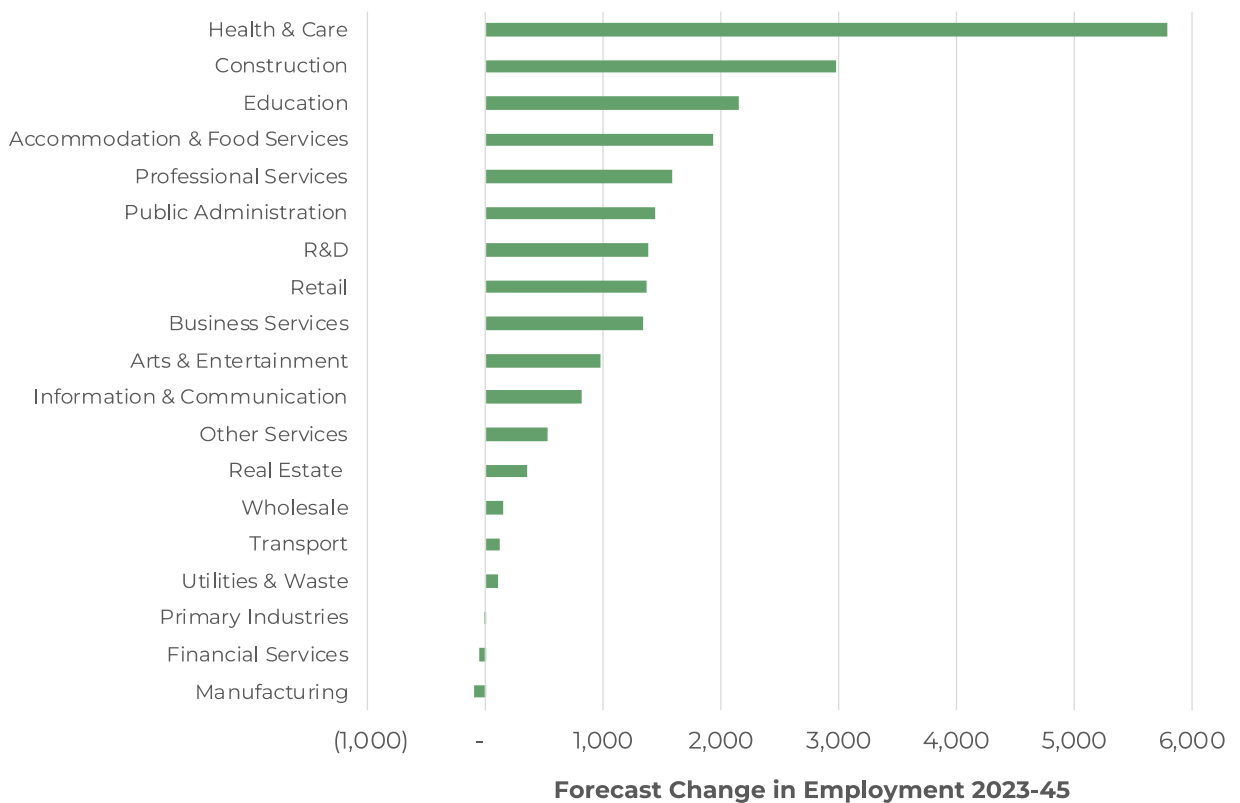
<sup>12</sup> This comprises jobs in activities creating products or services that are traded outside the local area. For example, manufacturing activities, regional or national service businesses or government departments and functions. These activities are not reliant on demand from the local population, but from customers (either businesses or consumers) further afield in the UK or internationally.

<sup>13</sup> In particular this comprises jobs that are related primarily to the place in which they are located or perhaps its hinterland, essentially jobs that make a place function effectively. This includes jobs in many sectors such as retail, motor trades, food and drink, education, health, construction and related maintenance trades, leisure and public administration.

- Significant employment growth in the Health & Care sector, accounting for 25% of total employment growth over the analysis period, almost 6,000 jobs;
- Major employment growth in the Construction sector, with around 3,000 additional jobs;
- Substantial employment growth within the Education and Accommodation & Food Services sectors, with around 2,000 jobs in each; and
- More than 1,000 jobs in each of the Professional Services, Public Administration, Business Services, Retail and R&D sectors<sup>14</sup> which includes much of the life sciences and med tech sectors.

2.23 The high value professional and scientific sector, encompassing professional services, R&D and the elements of UKHSA incorporated within the public administration sector aggregate to around 4,000 jobs, highlighting its potential role in the future growth of HGGT.

**Figure 5 Forecast change in employment by sector 2023-45 (with UKHSA and remaining gap closed)**



Source: HJA based on EEFM, UKHSA, Oxford Economics, IDP

2.24 Analysis of occupational and wage data (see Table 2) indicates that this sectoral growth profile is slightly skewed towards higher order occupations and higher wage employment. However, it will continue to provide employment opportunities across the occupational and skills spectrum.

<sup>14</sup> UKHSA employment is spread across the public administration and R&D sectors in line with how it is currently recorded at its existing locations within the ONS Business Register and Employment Survey data.



**Table 2 Occupational Profile Estimates**

Occupational Group (SOC2020)	UK Median Full-time Earnings <sup>15</sup>	Estimated Current Profile 2023 <sup>16</sup>	Estimated Future Profile 2045 <sup>17</sup>	Change (%)
Managers and Senior Officials	£45,900	11%	11%	-3%
Professional	£41,600	25%	26%	+4%
Assoc Prof. and Technical	£33,300	14%	15%	+1%
Administrative and Secretarial	£25,500	10%	10%	+1%
Skilled Trades	£30,200	9%	9%	+2%
Personal Service	£21,800	7%	8%	+14%
Sales and Customer Service	£21,900	8%	7%	-10%
Process, Plant and Machine Operatives	£27,900	5%	4%	-12%
Elementary	£23,200	10%	10%	-6%

Source: HJA based on ONS Annual Population Survey and own modelling

<sup>15</sup> ONS Annual Survey of Hours and Earnings, 2022. UK full time median earnings data provided as indicator of occupational earnings.

<sup>16</sup> Estimated for some occupations due to some data gaps in ONS APS 2022 data for Harlow workplace based occupational profile, APS profile applied to modelled employment by sector to be consistent with forecast data.

<sup>17</sup> Based on UK sector (SIC) to occupation (SOC) data from ONS Annual Population Survey 2022 applied to estimated sectoral profile at 2045.



### 3 Strategic Framework

- 3.1 The previous chapter sets out the economic road map and highlights the need for significant jobs growth to be achieved across HGGT to achieve the balanced community ambitions. This will require a step change in employment growth when compared to the historic performance of Harlow.
- 3.2 To deliver this growth there will also need to be a step-change in economic development focus and a concerted effort across HGGT stakeholders to:
  - Deliver the identified bottom-up growth
  - Plug the remaining gap
  - Achieve policy ambitions around inclusivity and sustainability
- 3.3 A strategic economic framework has been developed across six themes, which are well aligned with the Harlow EDS, as summarised in Figure 6.
  - **Attract** – new investment will need to be attracted to HGGT. This will require a focused and aligned promotional effort with consistent messaging to highlight the opportunities and potential of HGGT to investors.
  - **Develop & Grow** – the scale of employment growth required will not be met through parachuting in investment from elsewhere, but will also require bottom up, local business start-up and growth.
  - **Accommodate** – sufficient sites and premises of the right type are critical to facilitating the growth ambitions and effective place making across HGGT.
  - **Enable** – ensuring a workforce with the right skills and aspirations is vital for attracting investment, enabling businesses to grow, and ensuring residents can participate.
  - **Retain** – to deliver the inclusive growth ambitions there is a need to take a strategic approach to ensuring opportunities, investment and expenditure within HGGT are retained locally and benefits local residents.
  - **Drive** – ensuring sufficient capacity to coordinate and drive forward growth at scale across the HGGT.

**Figure 6 Headline strategic framework**

<b>Attract</b>	Inward Investment
<b>Develop &amp; Grow</b>	Business & Innovation Support
<b>Accommodate</b>	Employment Sites & Premises
<b>Enable</b>	Skills & Training
<b>Retain</b>	Community Wealth Building
<b>Drive</b>	Coordination & Capacity

- 3.4 These themes are not mutually exclusive with myriad interactions. For example, attracting new inward investment will be reliant on evidencing both a strong skills base and having the right sites and premises to offer.
- 3.5 The following chapters discuss each theme in more detail with high level action frameworks. Across all themes the emphasis in the short term is putting in place key building blocks that can drive growth over the medium and long term.

## 4 Attract: Inward Investment

### Context

- 4.1 Delivering employment growth across HGGT is a high priority for this strategic framework, to ensure that wider placemaking ambitions for the Garden Town can be achieved. This will require a mix of new investments from outside the area and growth in the local business base (considered in the following chapter).
- 4.2 The potential relocation of the UKHSA, with a final investment decision due in 2023, creates an opportunity to kick-start inward investment to the Garden Town<sup>18</sup>. The presence of UKHSA within the HGGT has significant direct job creation potential, as well as creating an asset around which wider economic development efforts can be built (e.g. to capture supply chain and spin out activity); focused on one of the key sectors. Whilst UKHSA has the potential to deliver only part of the growth required, seeking to secure this investment is a huge opportunity to accelerate the required economic growth of HGGT. Coordinated lobbying for a positive decision is therefore an immediate action for all HGGT stakeholders.
- 4.3 If UKHSA does not relocate to Harlow the need to drive jobs growth only increases. The former GSK site which is currently under consideration will remain a prime opportunity. Stakeholders will need to focus efforts on a proactive and open approach to attracting businesses to the Garden Town, particularly within the key sectors. In the short term the approach to inward investment should be flexible, to secure quick wins and build momentum, confidence and critical mass, rather than pursuing a narrow focus. This also needs to be reflected in how sites are promoted.
- 4.4 Currently, the majority of inward investment activity is reactive, including the recently developed website to provide information on sites across the UK Innovation Core<sup>19</sup> area. To drive the required step change in growth there is a need to take a far more proactive approach to investment promotion. This will require agreement on a consistent proposition, brand and messaging to promote the HGGT area effectively. This is potentially complicated given the number of existing stakeholders with a role and a mixture of competing and aligned interests<sup>20</sup>. It is recognised that this needs to be very clearly place driven whilst also securing the wider benefits of working with partners to extend reach and achieve economies of scale.
- 4.5 The focus of inward investment promotional activity should not be solely on landing very large schemes, which can take many years to deliver. There is a need to consider how SMEs can be attracted across the key sectors, to build a resilient business base, and clusters of activity that can build critical mass and become attractors of further investment into the medium and long term.

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<sup>18</sup> The final number of job roles to be relocated is currently uncertain and will be determined as part of the final investment decision making process. It had previously been anticipated that 2,750 roles would be relocated. However, informal dialogue with UKHSA has indicated that the scale of relocation is likely to be lower than previously envisaged. If a positive investment decision is taken it is anticipated jobs will be moved to Harlow over the period 2027-2033.

<sup>19</sup> The UK Innovation Core covers the districts of Broxbourne, East Herts, Epping Forest, Harlow and Uttlesford. This is a subset of the UK Innovation Corridor area.

<sup>20</sup> There is a need to overcome the challenges of cross county/LEP/district boundaries in order to coalesce around a common brand.

- 4.6 Inward investment efforts should also focus on developing and leveraging the benefits of HGGT’s location at the heart of the UK Innovation Corridor to strengthen connections to Cambridge and London, with potential to target secondary and tertiary companies in supply chains.
- 4.7 The Inward Investment theme interacts with other themes of this framework, particularly Skills & Training and Employment Sites & Premises themes. There is a need for clear feedback loops to ensure the sites and premises offer across the entire HGGT is aligned to promotional activities.
- 4.8 Placemaking will be a further catalyst to attract investment to HGGT, ensuring the quality of place and the range of amenities and services are attractive to potential occupiers and their workforces. Efforts are already underway to deliver regeneration of Harlow town centre, including Towns Fund and Levelling Up Fund supported investments. This is in addition to ensuring the new Garden Communities are vibrant in their own right, as well as part of an integrated HGGT.

## Objectives

- 4.9 Objectives within the Inward Investment theme include:
  - Supporting a step change in employment growth across HGGT
  - Delivering a coordinated and consistent proactive inward investment function
  - Securing funding for large scale town centre regeneration in Harlow

## Action Framework

Action	Stakeholders
<b>Short Term</b>	
Agreement of consistent branding and promotional proposition with committed focus to achieving HGGT employment growth.	HGGT (lead), Harlow Council, Epping Forest District Council, East Herts Council, UKICorridor, UKICore, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP.
Development and launch of a promotional inward investment offering for HGGT whilst exploring potential to extend reach and drive economies of scale through working with partners.	
Driving stronger connections and relationships into the UK Innovation Corridor to establish links to Cambridge and London institutions and businesses.	
Preparation of an SME attraction and development strategy including focus on key sectors and consideration of infrastructure investment to act as key attractor <sup>21</sup> .	

<sup>21</sup> For example, Lisbon has been cited as successful in providing lab space and other facilities in order to attract high quality start ups and grow on businesses. See <https://www.espon.eu/scaling-smes-and-attracting-fdi-what-role-local-and-regional-governments> [Last accessed 27/06/2023].

Action	Stakeholders
Coordinated lobbying and support focused on securing UKHSA relocation as a potential lynchpin to future HGGT growth.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP, UKHSA
Developing a UKHSA supply chain and affiliate attraction strategy, including reviewing opportunities to utilise unused parts of the former GSK site to drive related growth.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP.
Establishing clear linkages between economic development, planning and developers to ensure alignment between inward investment activity, wider business growth support and sites and premises provision.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council,
Establishing a task force to consider economic led opportunities for former GSK site and reflection on key sector strategy in the event the UKHSA relocation fails to progress.	Harlow Council, HGGT, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP,
Continued support for major town centre regeneration with promotion of employment role on key opportunity sites and continued efforts to secure funding at scale to deliver transformation.	HGGT, Harlow Council, EFDC, EHC, ECC, Developers
<b>Medium Term</b>	
Establishing and developing the promotional inward investment function.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP,
Continuing to drive linkages across UK Innovation Corridor to secure increased presence of key institutions within HGGT.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP,
Implementing SME attraction strategy actions.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP,



Action	Stakeholders
Implementing response to UKHSA investment decision to maximise impact of former GSK site.	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, UKI Corridor, UKI Core, Essex County Council, Hertfordshire County Council, SELEP, HertsLEP,
Delivering town centre regeneration.	HGGT, Harlow Council, ECC, Developers
<b>Long Term</b>	
This action framework will be kept under review to ensure a rolling 5-10 year programme of required actions aligned to progress achieved and wider updates to relevant visioning, policy and strategy.	



## 5 Develop & Grow: Business & Innovation Support

### Context

- 5.1 Whilst attracting new inward investments to HGGT will be a key component of economic growth, developing the business base, through scaling up existing enterprises and the formation of new ones will be critical. More than 99% of the business base are SMEs<sup>22</sup>, accounting for more than 60% of employment. On that basis nearly 14,000 of the required jobs are likely to be within SMEs.
- 5.2 It will take a proactive approach to creating an enterprising and innovating culture, ensuring that the infrastructure to start and grow businesses is clear, consistent and well communicated. Therefore, this SME focus must also align with our Sites & Premises theme to ensure the right commercial property infrastructure is in place to facilitate growth and development across the Garden Town.
- 5.3 Business support services to SMEs (including start up, growth and innovation) at present are far from clear, consistent and well communicated. The current offer is also very slimmed-down compared to previous provision. This is not an HGGT issue, but a national issue resulting from various policy and funding changes. This creates a particular challenge for HGGT. Straddling three local authorities and two counties/LEP areas there is the very real prospect that three businesses in three different parts of HGGT would have three very different business support offerings available to them. This is in stark contrast to the ambitions for a coherent and integrated Garden Town. This will require real cross boundary working to align services.
- 5.4 In the immediate term we must continue to raise awareness of available growth support across the existing Harlow business base. For example, schemes such as the UK Government's Help to Grow initiative can help to catalyse SME growth through developing management capability. We must also ensure we strengthen links into and awareness of central offerings, as well as local provision to maximise take up across HGGT.
- 5.5 We will need to work to develop campaigns to encourage and support new business start-ups and must also work to support business networks across the Garden Town, aligning to the activities within the Harlow EDS.
- 5.6 To ensure we can support our science and technology sectors we need to develop the innovation ecosystem within the Garden Town and across our wider sub-region. In particular we need to work to improve the breadth and depth of innovation support across the Garden Town through engagement with key institutions across the UK Innovation Corridor to increase the presence of universities and other innovation support bodies within HGGT.
- 5.7 Business support can also develop focus around the key sectors, particularly around health, life sciences and med tech as well as the growing arts and cultural sector. Developing and

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<sup>22</sup> Small and medium sized enterprises, this includes businesses with up to 249 employees and turnover of less than €50 million per annum.



growing our own SMEs in these sectors will boost embeddedness and can also develop integration with key inward investors to drive innovation<sup>23</sup>.

- Life Sciences/MedTech includes existing assets within Harlow Innovation Park (including Arise Innovation Hub). The UKHSA and replacement Princess Alexandra Hospital investments provide a potential boost to this, with opportunity to develop supply chain and spin out businesses within the HGGT. Activity should be coordinated with the UK Innovation Corridor to lever the opportunities of HGGT's location in proximity to existing innovation hub locations at Cambridge and London as well as Stevenage.
- Advanced Engineering and Technology, building on existing businesses such as Arrow Technologies and Raytheon and Harlow's long history of technological innovation.
- Arts & Culture includes existing assets around the Playhouse and will benefit from recent funding successes such as Levelling Up Fund to develop an arts and cultural quarter, including arts and creative workspaces. Opportunities to develop arts and cultural SMEs across the entire HGGT should be explored to integrate economic and placemaking ambitions.

## Objectives

5.8 Objectives for the business and innovation support theme include:

- Ensuring consistent and clear business support offer across the HGGT
- Developing a start-up, scale up and innovation culture across the HGGT
- Developing embedded SME focused key sector clusters

## Action Framework

Action	Stakeholders
<b>Short Term</b>	
Continue to promote current development opportunities e.g. Help to Grow to existing companies	Harlow Council
Explore how to overcome postcode lottery as new developments come on stream and ensure coordination and consistency of business support offer	HGGT, Harlow Council, Epping Forest District Council, East Herts Council, Essex County Council, Hertfordshire County Council, SELEP, Herts LEP
Strengthen linkages and communication across stakeholders and into Whitehall to ensure awareness of all schemes that can be promoted to HGGT businesses.	
Develop and promote enterprise culture campaigns and activities including outreach to schools and colleges. Considering pursuing funding to support an entrepreneurship officer with sub-regional partners to lead activities across HGGT and beyond.	HGGT, Harlow Council, Epping Forest District Council, Essex County Council, Hertfordshire County Council, East Herts Council, HertsLEP, SELEP

<sup>23</sup> For example using approaches such as those set out at <https://www.oecd.org/cfe/smes/fdi-sme.htm> [last accessed 27/06/2023] to foster linkages and strengthen local resilience. These approaches can also be applied to domestic inward investment such as the potential relocation of UKHSA.

Action	Stakeholders
Develop business networks with reach across the Garden Town, building on recent activities in Harlow and integrating with existing business representative organisations.	Harlow Council, Epping Forest District Council, East Herts Council
Developing a strategy and launching activity to catalyse cluster development around UKHSA supply chain and spin out opportunities, with a view to rolling out to other inward investments or developments including replacement Princess Alexandra Hospital.	HGGT, Harlow Council, UKHSA, Counties, LEPs, Colleges, ARISE
Explore HGGT focused support for local cluster growth in health and life sciences/adv. manufacturing and technology <ul style="list-style-type: none"> <li>Strengthening links across UKIC into key innovation assets</li> <li>Ensuring strategic engagement from sector development resources (DIT, British Business Bank etc)</li> <li>Supporting collaboration between existing strengths including health/med tech, the Digital Innovation Zone and ARISE as identified in the Harlow EDS.</li> </ul>	UKIC, UKHSA, Herts LEP, SELEP, Essex County Council, Herts County Council, Anglia Ruskin University/ARISE, District Councils, Digital Innovation Zone.
Establish links between existing/developing arts and cultural sector (including LUF investment) across new Garden Communities	HGGT, Harlow Council, Epping Forest District Council, East Herts Council
<b>Medium Term</b>	
Roll out aligned business start up, growth and innovation support across the Garden Town area.	Harlow Council, Epping Forest District Council, East Herts Council
Continuing cluster growth development around major investments e.g. UKHSA and PAH to develop supply chain and spin out opportunities	HGGT, Harlow Council, UKHSA, Counties, LEPs, Colleges, ARISE
Further development of innovation support capacity including establishing additional University presence within HGGT as part of wider effort to strengthen links to UKICorridor and local innovation ecosystem	HGGT, Harlow Council, UKHSA, Counties, LEPs, UKICorridor
<b>Long Term</b>	
This action framework will be kept under review to ensure a rolling 5-10 year programme of required actions aligned to progress achieved and wider updates to relevant visioning, policy and strategy.	

## 6 Accommodate: Employment Sites & Premises

### Context

- 6.1 It is vital that there is sufficient employment sites and premises to accommodate the growth required to achieve the ambitions for HGGT. Discussions with economic development stakeholders in the process of developing this framework have highlighted the critical challenges faced in accommodating growing businesses within the HGGT at present, and the increasing pressure on existing employment areas from alternative uses or land hungry warehousing uses, leaving a reducing supply of available sites to meet occupier needs. Identifying new sites is also challenging given the extent of Green Belt around HGGT and remaining undeveloped areas at Harlow leading to limited opportunities for further expansion.
- 6.2 There is also a conflict between the current state of the commercial market, which is not enabling new employment development at scale due to weak viability; the aspirations of HGGT policy; and the evidence set out in this framework of a need for substantially higher levels of employment growth in order to deliver a balanced community. This creates a conundrum that will require time and effort to resolve in order to build confidence, stimulate demand and enable commercial employment development.
- 6.3 What is essential is the availability of sites and premises to sustainably facilitate growing businesses and to accommodate inward investment. Without this the economic ambitions will be sure to falter.

### Need and Supply

- 6.4 Detailed analysis of future employment sites and premises need and supply was undertaken as part of the 2020 HGGT Employment Commission. Appendix 2 to this report sets out updated analysis assessing the anticipated need for employment land across HGGT aligned to the economic road map, and in keeping with the approaches established as part of earlier studies<sup>24</sup>. A summary of the updated analysis is set out at Table 3.
- 6.5 Within the current Local Plan periods (to 2033) need<sup>25</sup> is estimated at 8.9ha of industrial and warehousing land and 3.1 – 7.8ha<sup>26</sup> of land for office development (31,000 sq m of floorspace). In addition, a backlog need of up to 14ha of employment development has been identified based on the low level of development activity across Harlow since 2016. In aggregate this leads to a total requirement of up to 25.3 – 30.8ha.
- 6.6 Remaining undeveloped employment allocations across HGGT total 22.3ha. However, 'effective' remaining supply is estimated at 13 – 17ha due to significant constraints or agreement for non E(g) or B Use Class development on the allocated sites. Appendix 3 sets out further detail of the employment land supply position.

<sup>24</sup> The 2017 FEMA Employment Land Study and 2020 Employment Commission

<sup>25</sup> This includes existing allocations, but does not include the reuse of brownfield employment areas. Sites such as the former GSK site, former Raytheon site, River Way, Kao Park, East Place and Templefields are accounted for within the adjustment for reusing former employment sites to accommodate new development.

<sup>26</sup> Office type development can be achieved at very different densities. This indicative range is based on 40-100% development density. Much higher densities could be achieved in town centre locations therefore reducing the land take. For this reason floorspace figures in square metres is a preferable measure.

**Table 3 Summary of Employment Land Need and Supply (all figs in ha)**

	Current Plan Period	Framework Period 2023-45
<b>Future Need</b>		
Office	3.1 – 7.8	5.3 – 13.3
Industrial & Warehousing	8.9	23.8
<b>Sub Total</b>	<b>11.3 – 16.8</b>	<b>29.1 – 37.1</b>
Backlog	Up to 14ha	Up to 14ha
<b>Total Need</b>	<b>Up to 25.3 – 30.8</b>	<b>Up to 43.1 – 51.1</b>
<b>Supply</b>		
Remaining Supply	22.3	22.3
Effective Supply	13 – 17	13 – 17

Source: HJA Analysis. Figures may not sum due to rounding.

- 6.7 In combination the analysis shows a substantial quantitative shortfall within the Local Plan period to 2033, which is exacerbated when looking beyond the current Local Plan period. This is before taking any account of qualitative factors. This will need resolution through the respective Local Plan review processes. In the short term the role of existing allocated sites needs to be maximised (particularly given viability challenges within the development market) and other potential opportunity sites need to be explored.
- 6.8 Remaining supply within HGGT suitable for industrial and warehousing development is well below the identified requirement, with a maximum of 7ha and the adjusted 'effective' supply figure is well below this. The majority of remaining sites have allocations for B1<sup>27</sup> or E Use Class development and the Garden Communities are not envisioned to deliver B2 or B8 development at scale.
- 6.9 7ha of employment land has been allocated within the new Garden Communities but the latest available information suggests much of this will be targeted at a wider range of employment generating and commercial uses rather than contributing to the 'traditional' employment classes. All efforts should be used to ensure employment (E(g), B2, B8) development is retained within the Garden Communities to meet the needs of SMEs, deliver a range of employment opportunities and ensure services are available to residents and to support the needs of HGGT.
- 6.10 The analysis indicates a significant shortfall in meeting the identified need for industrial and warehousing uses in the short term, as well as risking the overall placemaking ambitions for the Garden Communities as set out within the HGGT Employment Commission (2020). Addressing this shortfall will require clear focus to retain existing sites as a priority in the

<sup>27</sup> The Use Classes Order has been revised since the original allocations were made, so would now be considered as E(g)

short term. In the medium term there is a need to identify the next generation of employment sites that can serve the future growth of the Garden Town.

- 6.11 Some additional capacity could be utilised at the North Weald Airfield site, with an allocation for 10ha just beyond the HGGT boundary for industrial and warehousing uses. However, this will also play a role in meeting the wider needs of Epping Forest District. Opportunities for employment development adjacent to the new Princess Alexandra Hospital should also be explored.
- 6.12 In addition, opportunity sites across Harlow town centre have been identified, with potential to deliver up to 16,400 sq m; although the timing on this is uncertain and this would be relevant to office uses and will not help to address the shortfall of industrial capacity.
- 6.13 Stakeholders should work to ensure a continuous rolling supply of available employment sites in order that growing and relocating business can be accommodated.

## Sites

- 6.14 In terms of strategic employment sites, the Enterprise Zone including Harlow Innovation Park will continue to be a key priority for developing life sciences and high technology businesses. Given public ownership of part of the site there are potential opportunities to take a more proactive approach to encouraging growth in target sectors. Notwithstanding, identifying the next location for science and technology development is needed.
- 6.15 UKHSA has informally indicated that there will be spare capacity at the former GSK site that is earmarked for its use. This creates a potential opportunity to develop a cluster of related businesses if the relocation investment decision is favourable. In the event the relocation of UKHSA is downgraded the potential to use a strategic site in public ownership as a key asset to drive high value sector growth should be explored as a matter of urgency. This has the potential to tie in with actions under the Attract and Grow & Develop themes to take a proactive approach to developing infrastructure to boost economic development in key sectors.
- 6.16 Analysis considering the regeneration of Harlow town centre has identified potential for around 16,000 sq m of new office capacity. Whilst Harlow has seen a significant reduction in town centre office stocks in recent years, a rejuvenated and thriving mixed use centre with residential, leisure, arts, entertainment, retail and offices has the potential to become a far more attractive proposition to occupiers desiring a range of amenity provision to meet employee needs. Current capacity figures are relatively modest and consideration of increased employment workspace should be proposed, taking into account the planned development of arts and cultural activity within the central area.
- 6.17 The analysis set out above reconfirms the findings of the Employment Commission that the Garden Communities need to play a role in meeting the needs of the wider HGGT. Current proposals include small to medium scale mixed use local centres within the heart of Garden Communities. There is also potential for some additional employment development at Gilston Village 6 and Dorrington Farm. These opportunities should be maximised to provide a range of accommodation for SMEs. The following approaches should be considered:
  - Developing a meanwhile use strategy across the HGGT (including the Garden Communities) to assist in safeguarding land for longer term employment use and supporting cohesive placemaking and masterplanning in the short to medium term. This

should integrate with wider community wealth building ambitions as explored at Chapter 8;

- Ensuring Garden Communities deliver on walkable neighbourhood ambitions and provide a range of local services and community facilities. This will include a mix of employment space to facilitate commercial, trade and employment uses; and
- Ensuring Garden Communities play an active role in supporting SME development and facilitating an enterprise culture. This will include providing start up and grow on space for SMEs and hybrid working particularly within E(g) Use Classes.

## Evidence and Policy

- 6.18 There are a number of pieces of research and policy development that will be required to support this theme.
- 6.19 There is a need for continued coherent planning for the HGGT. Current Local Plans run to 2033. These were developed using a shared evidence base. This should be considered as a minimum to enable the employment needs of the Garden Town to be reviewed in a joined-up manner as Local Plan reviews take place and to identify the next generation of strategic employment sites for the HGGT. A joint strategic plan should also be considered to ensure a consistent and coherent policy basis beyond 2033 for strategic matters relating to the Garden Town and key infrastructure.
- 6.20 Local Plan review processes and the development of new Local Plans will require additional provision to be made to support the economic ambitions of HGGT and tackle the challenges already being faced when seeking to accommodate growing businesses and new occupier enquiries. New provisions will need to be made fully recognising the ambitions and approach of this framework and the wider HGGT placemaking approaches. This will include alignment with sustainable transport ambitions and considering how public transport interchanges and sustainable transport corridors can be integrated into spatial economic planning to avoid increased car use.
- 6.21 Commercial viability is the key challenge, an issue that goes beyond HGGT, with rising construction costs making the successful delivery of new commercial employment space very difficult. A HGGT viability evidence base is required to ensure the challenges are objectively understood and appropriate response mechanisms can be developed where appropriate.
- 6.22 Greater understanding of wider infrastructure needs should be coordinated with employment land studies to ensure issues such as power and digital infrastructure align; as well as public transport interchanges and sustainable transport corridors. Town Centre masterplanning activity should also be aligned with this economic framework to ensure its potential role in supporting the economic ambitions of the HGGT are fully recognised in addition to placemaking.
- 6.23 A larger than local logistics study should be undertaken to look at strategic options for land hungry uses in order to ensure the constrained supply of sites within Harlow can be utilised to accommodate higher density uses. Any such study should consider the M11 corridor as a

minimum<sup>28</sup> and could look wider given the range of large scale logistics proposals being developed across Essex.

6.24 A feasibility study to consider the potential for developing SME focused start up and grow on space across the Garden Town in order to understand potential demand levels, funding requirements and business case. This ties across to actions under earlier themes to use infrastructure development as a tool to attract and grow cluster activity, and can support wider SME and innovation development actions.

## Objectives

6.25 Objectives for the employment sites and premises theme include:

- Overcome shortage of employment provision, particularly for B2/B8 uses across HGGT
- Secure employment contribution of Garden Communities
- Identify next phase employment space including for science and technology uses

## Action Framework

Action	Stakeholders
<b>Short Term</b>	
Seeking to protect existing employment areas within the HGGT from change of use to mitigate current shortages in supply.	Harlow Council, Epping Forest District Council, East Herts Council
Ensuring the development of evidence relating to employment sites and premises is delivered in a joined up and coordinated way to plan coherently for the future growth of the Garden Town. Aligning employment evidence with infrastructure analysis to ensure appropriate power and digital requirements are planned and delivered.	
Use the Local Plan review processes to address identified employment land shortfall and develop a mechanism for ensuring a rolling supply of available employment sites	
Identify the next generation of strategic employment sites, including for science and technology uses.	
Undertake collaborative viability study to understand challenges and potential responses.	
Engage with UKHSA and UK Government to clarify the potential scale of opportunity at the former GSK site for wider cluster development.	HGGT, Harlow Council
Undertake a larger than local logistics study to ensure a strategic approach to meeting needs of a key sector with extensive land requirements. Scale and reach to be agreed.	Harlow Council, Epping Forest District Council, East Herts Council, HGGT, ECC, HCC, SELEP, EHLEP

<sup>28</sup> The M11 focus would take into account recent development of J7a, proposals for new development at London Stansted Airport (Northside). This may also consider looking wider including freeport proposals within Essex.



Action	Stakeholders
Undertake feasibility study to explore potential for delivery of start up and grow on space.	Harlow Council, Epping Forest District Council, East Herts Council, HGGT, ECC, HCC, SELEP, EHLEP
<b>Medium Term</b>	
Consideration of Joint Strategic Plan (or similar) to ensure coordinated approach to HGGT development beyond the current plan period	Harlow Council, Epping Forest District Council, East Herts Council
Developing office capacity within Harlow town centre regeneration and ensuring town centre masterplanning is fully cognisant of its potential employment and economic role	Harlow Council
Allocate additional employment sites within Local Plans including next generation science and innovation park	Harlow Council, Epping Forest District Council, East Herts Council
<b>Long Term</b>	
This action framework will be kept under review to ensure a rolling 5-10 year programme of required actions aligned to progress achieved and wider updates to relevant visioning, policy and strategy.	



## 7 Enable: Skills and Training

### Context

- 7.1 Skills and training will play a key role for both residents and businesses in the development of HGGT. For residents to participate in the employment opportunities that are created, they will need the skills and aspirations to access them. For businesses it is vital they can find the skilled labour to fill the roles created. In order to attract new investment there is a need to demonstrate a skilled workforce that can support the establishment and growth of new operations within HGGT.
- 7.2 Enabling the residents of Harlow to participate and share in the opportunities and benefits of growth arising from HGGT is at the core of the vision and policy ambition. Without this there is a significant risk of entrenching existing disparities in the local economy. The Harlow EDS highlights skills and training as one of its highest priorities. For HGGT, stakeholders across the wider area will fully support and enable that ambition and the actions within the Harlow EDS where appropriate.
- 7.3 Analysis carried out to develop the economic road map has shown employment opportunities are anticipated across a broad range of sectors in both the foundational and tradeable economy. In addition to new job creation there will be significant replacement demand through the natural ageing and churn in the workforce. This will mean significant employment opportunities across skills levels and sectors well beyond historic activity levels in Harlow. Further work will need to be commissioned to understand the likely skills needs across the Garden Town to ensure coordinated strategic planning, building on the recently developed Local Skills Improvement Plans (LSIPs) for Essex and Hertfordshire.
- 7.4 Skills and training stakeholders have indicated that funding for expanding provision is not a major barrier across the core market segments of 16-18 year olds, adults and apprenticeships. It was also indicated that there is no current need for major restructuring of provision. However, there is a desire to build capacity for higher level skills delivery to meet the needs of key sectors. There have already been a range of significant investments in skills and training infrastructure in readiness for growth across a range of sectors including Harlow College's Construction Skills Centre<sup>29</sup>, Renewable Energy Centre and participation in the South East Institute of Technology.
- 7.5 A critical issue that has emerged in consultation with stakeholders<sup>30</sup> in developing both this framework and the Harlow EDS is the need to effectively communicate the opportunities within the HGGT to residents, and particularly young people. If they are not aware of the prospects, and the skills and qualifications that will be needed to access those opportunities, it will drive the demand for in-commuting, working against the core principles of the Garden Town.

<sup>29</sup> This modular facility can be relocated to meet the needs of large scale construction projects.

<sup>30</sup> This chapter has been developed drawing on a workshop including Hertford Regional College, Harlow College, Harlow Council, New City College, Epping Forest District Council and Essex County Council.

## 7.6 Further issues identified by stakeholders for key focus include:

- Engagement with young people at an early age to explain and inspire about future opportunities (particularly in life sciences);
- Creating a culture of lifelong learning and growing aspiration<sup>31</sup>;
- Adult enabling skills (e.g. literacy and numeracy);
- Developing soft/employability skills;
- Engaging with employers and growth sectors to ensure provision can match needs (in particular major employers such as UKHSA and Princess Alexandra Hospital) with sufficient time to put plans in place and tool up training providers;
- Securing employment and training opportunities (including work placements) through Section 106 agreements and Employment and Skills Strategies for major developments; and
- Particular challenges around construction skills and training which have the potential to create major workforce challenges in the medium term.

7.7 A wider issue highlighted by providers is that of public transport, affecting the ability of those without private transport accessing placements and employment opportunities; particularly where this involves travelling during unsociable hours. The benefits arising from developing sustainable transport corridors need to be captured to ensure these enable residents to access training and employment opportunities.

### Sector Focus

With major planned or proposed physical development including 20,000 new dwellings, UKHSA, replacement Princess Alexandra Hospital and major town centre regeneration, as well as retrofit of existing buildings to meet increasing sustainability standards the need to grow the **construction** skills base is a major challenge for HGGT. In addition there are national and regional sector challenges at play. A shortage of staff willing to deliver construction skills training exacerbates the issues. This requires an urgent strategic response with the potential for HGGT to play a convening role, linking across developers, public sector bodies and training providers, as well as interfacing with regional organisations seeking to tackle these challenges.

The **health and care** sector is identified as the largest employment growth sector in HGGT over the next 20 years. This will remain a high priority sector for skills and training across the framework period to respond to the needs of a growing and ageing population, as well as the changing nature of health and care, and the replacement Princess Alexandra Hospital.

Across the **life sciences, med tech, advanced engineering and technology** sectors the importance of higher-level STEM<sup>32</sup> skills is increasing. This will also impact on **warehousing and logistics** with increased levels of automation and complex logistics planning. Local capacity will need to be developed to support these sectors, particularly where local demand has been lower in recent years such as within the life sciences.

<sup>31</sup> See also [https://issuu.com/acl-essex/docs/9471\\_acl\\_strategy\\_2022-2025\\_accessible](https://issuu.com/acl-essex/docs/9471_acl_strategy_2022-2025_accessible) [last accessed 27/06/2023].

<sup>32</sup> Science, Technology, Engineering and Maths

## Objectives

7.8 Objectives for the skills and training theme include:

- Ensuring skills to underpin growth ambitions, particularly in key sectors of health and care; life sciences and med tech; and construction
- Maximising the employment and skills impact of major investments
- Supporting ambitions of the Harlow Economic Development Strategy
- Developing stronger employer-provider links, including SME sector

## Action Framework

Action	Stakeholders
<b>Short Term</b>	
<p>Support the skills and employment actions of the Harlow EDS actions to ensure Harlow residents have the awareness and skills to benefit from the opportunities of HGGT. These include actions around:</p> <ul style="list-style-type: none"> <li>• Aspiration and awareness raising;</li> <li>• Youth, education and industry links;</li> <li>• Improving attainment;</li> <li>• Boosting participation; and</li> <li>• Developing skills for growth.</li> </ul>	HGGT, County and District Councils, Colleges and Training Providers, DWP
<p>Commission a HGGT Skills Audit with key sector focus to provide coordinated intelligence. This should consider ongoing skills gap tracking and include ongoing engagement to implement recommendations.</p>	HGGT, Harlow Council, EFDC, East Herts Council, Developers, Colleges and Training Providers, Business Representative Organisations/Key Employers
<p>Convene key stakeholders to develop a construction sector skills and employment task force to address key challenges including:</p> <ul style="list-style-type: none"> <li>• Working with partners to promote training careers</li> <li>• Highlighting opportunities to the future workforce</li> </ul>	HGGT, County and District Councils, Colleges and Training Providers, Construction Industry Bodies, Developers, and LEPS
<p>Develop a skills and employment plans with UKHSA (as soon as investment decision is taken) and PAH as a template to roll out to other major inward investors.</p>	Harlow Council, Essex County Council, HGGT, UKHSA, PAH Harlow College, Partner Colleges and Training Providers
<p>Broker engagement to ensure aspirational S106 and Employment and Skills Strategies/Plans are in place to deliver social value across major developments. These should include clear communication and monitoring arrangements in place to ensure agreed actions and outputs are delivered through the supply chain with appropriate flexibility given the duration of major schemes.</p>	HGGT, Harlow Council, EFDC, East Herts Council, ECC, Herts County Council, Developers, Colleges and Training Providers



Action	Stakeholders
Appropriate contributions should be sought to a skills fund which can be used flexibly to address barriers and challenges in skills delivery across key sectors.	
Strengthening networks between SMEs (including small business representative organisations) and skills and training providers to improve skills development across the small business sector	HGGT, County and District Councils, Colleges and Training Providers, Business Representative Organisations.
<b>Medium Term</b>	
Continue to drive key sector skills awareness and build capacity with a focus on construction, life sciences and health to underpin growth	
Develop skills and employment plans with inward investors.	
Develop HE capacity and presence within HGGT to support higher level skills delivery and innovation support	
<b>Long Term</b>	
This action framework will be kept under review to ensure a rolling 5-10 year programme of required actions aligned to progress achieved and wider updates to relevant visioning, policy and strategy.	

## 8 Retain: Community Wealth Building

### Context

- 8.1 We want to maximise the value of HGGT planned investment and expenditure within the community. A strategic approach to community wealth building creates the potential to increase the local benefits of large-scale investment, to enhance placemaking and community development, and to support effective masterplanning across the entire HGGT.

**Community Wealth Building (CWB)** is a people-centred approach to retain and redirect wealth back into local economies to benefit local people. The approach seeks to achieve the recirculation of wealth into communities through creating fair work opportunities, supporting local businesses and inclusive ownership to expand, placing more investment and assets (i.e., land and property) into the hands of the local community.

The aim of CWB is to lock wealth within the local community through approaches such as developing and growing small enterprises, community organisations, and co-operatives to generate finance and investment in the local economy. Engagement from citizens, businesses and anchor institutions is key for facilitating CWB:

Encouraging citizens to own and control more parts of the local economy will help retain the wealth generated in the area.

Encouraging high rates of local employment and spending and investing in local assets will help local SMEs to grow, empowering local businesses and helping deliver social, and economic benefits.

Encouraging anchor institutions (organisations with a significant presence and stake in the local community in terms of spending power, workforce, and financial and physical assets) to work collectively, helping to encourage more local circulation of assets and spending.

CWB can be instilled into anchor institutions through policy and practices, where growth created by local, people-centred approaches drive their ambitions.

Greater promotion of local ownership and employment helps to generate and retain wealth as investments and expenditure are circulated within a more localised ecosystem as opposed to elsewhere (e.g., large chain suppliers/businesses that are based elsewhere). This can be supported through the provision of business support and funding, real-living wages, and improved pathways into employment and workplace progression.

Embedding CWB into procurement policies, recruitment processes and the way assets are managed can help create more local supply chains which are centred around local enterprises, SMEs, employee owned or community owned businesses, and social enterprises.

- 8.2 With significant capital investment and operational expenditure as a result of major physical development and new anchor institutions, it is vital that a coordinated approach to securing employment, skills, procurement and wider social value for HGGT is adopted, enabling greater consistency and coordination as well as building on recent pilot projects in Harlow and the draft HGGT Stewardship Charter. For major public sector developments including UKHSA and Princess Alexandra Hospital procurement may be led outside the HGGT area. We will need to lobby to secure social value generation including opportunities for skills,

employment and procurement through bid processes and the supply chain. This also applies to operation phases of activity with significant annual expenditure on goods and services anticipated. We must also work with our SME base to build capacity and networks or collectives to enable more effective tendering.

- 8.3 In addition, supporting community-based development through social enterprise, the creative and cultural sector, and across residents and businesses; in partnership with developers and local authorities; has the potential to deliver greater outcomes than stakeholders operating in isolation. This can contribute to creating community vibrancy across the new Garden Communities.
- 8.4 With long term development profiles for the Garden Communities, safeguarding land at their heart, for uses which may not be required in the short term can create commercial challenges. A 'meanwhile use' strategy provides a route to actively delivering community (and commercial) value in the short term, whilst safeguarding key land parcels for the long term. This could include utilising sites as construction skills hubs or a Modern Methods of Construction (MMC) facility given the scale of development.

The approach of developing '**meanwhile uses**' have been more widely adopted over recent years and describes the temporary occupation of vacant or underutilised premises, employment sites, or spaces.

They are seen as a way to facilitate local economic growth and deliver social and environmental benefits by making efficient use of land that awaits longer-term development. They can also help deliver against local ambitions surrounding regeneration, net zero, health and wellbeing, and employment creation.

Meanwhile uses can include the 'pop-up' and/or temporary provision of affordable workspaces (for local businesses, start-ups, entrepreneurs), shops, arts and cultural experiences, and community facilities.

The delivery of meanwhile uses are included within many Local Plans, recognising the need to optimise use of land in support of beneficial outcomes, especially as some strategic developments may not come into fruition for many years. For example, Greater Cambridge and Southampton City Council aim to set out policies in their draft local plans which seek the provision of meanwhile uses to support the local community by:

- enhancing vibrancy and vitality
- increasing activity and footfall
- developing a sense of community early on
- providing opportunities for job opportunities and business growth.

- 8.5 Community Wealth Building has already been incorporated as a key theme within the new Harlow EDS, building on a series of pilot projects. Stakeholders across the HGGT should seek to engage and support these actions, to build greater critical mass and deliver consistency across major developments.



## Objectives

8.6 Objectives for the community wealth building theme include:

- Maximise retained impact within HGGT area from large scale investments and public sector/anchor institution expenditure
- Contribute to vibrant places and community development within new Garden Communities
- Support safeguarding of employment uses for medium to longer term

## Action Framework

Action	Stakeholders
<b>Short Term</b>	
<p>Ensure social value is captured through S106 and other developer agreements on Garden Community developments, town centre regeneration and potential UKHSA and confirmed Princess Alexandra Hospital investments through both construction and operational phases</p> <ul style="list-style-type: none"> <li>• Encouraging and enabling local procurement (including procurement fairs and SME capability development)</li> <li>• Ensuring ambitious employment and skills strategies</li> <li>• Engagement with meanwhile use strategies to aid masterplanning</li> <li>• Lobbying for procurement flexibilities on major public sector frameworks, particularly for sub-contractor opportunities and requiring Tier 1 contractors to deliver local social value through bid processes</li> </ul>	<p>Harlow Council, HGGT, East Herts Council, Epping Forest District Council, Garden Community Developers</p>
<p>Develop and agree a social value monitoring framework</p>	<p>Harlow Council, HGGT, East Herts Council, Epping Forest District Council, Garden Community Developers</p>
<p>Widen Harlow pilot projects (see Harlow EDS) across HGGT developers and businesses including activities centred on:</p> <ul style="list-style-type: none"> <li>• Anchor institutions</li> <li>• SME procurement readiness</li> </ul>	<p>Harlow Council, HGGT, East Herts Council, Epping Forest District Council, Garden Community Developers, UKHSA and PAH</p>
<p>HGGT partners to develop own ambitious social value policies to lead by example</p>	<p>Harlow Council, HGGT, East Herts Council, Epping Forest District Council</p>
<p>Develop and implement ambitious meanwhile use strategy(ies) and task force across HGGT in partnership with local communities and social enterprise sector to develop community vitality, placemaking and safeguard employment sites.</p>	<p>Harlow Council, HGGT, East Herts Council, Epping Forest District Council, Garden Community Developers, Social Enterprise sector</p>



Action	Stakeholders
<b>Medium Term</b>	
Continue implementation of short term actions	Harlow Council, HGGT, East Herts Council, Epping Forest District Council, Garden Community Developers
Developing and strengthening support for the social enterprise sector within the wider business support offer.	Harlow Council, East Herts Council, Epping Forest District Council
Working with employers across HGGT to promote Living Wage Employer accreditation status	Harlow Council, East Herts Council, Epping Forest District Council
<b>Long Term</b>	
This action framework will be kept under review to ensure a rolling 5-10 year programme of required actions aligned to progress achieved and wider updates to relevant visioning, policy and strategy.	



## 9 Drive: Coordination & Capacity

- 9.1 This cross-cutting theme is focused on ensuring sufficient capacity to drive the required level of action. As set out at Chapter 2 of this report, a step change in growth performance is required. This will require action at scale and speed. It will also require the potential barriers of local authority and county boundaries to be overcome to deliver coordinated and aligned activity.
- 9.2 In addition, LEPs will not stay in their present form and may be absorbed into local authorities or, in some cases, become stand-alone organisations. Their future governance and structure will need to be considered as part of the delivery arrangements for the strategic framework<sup>33</sup>.
- 9.3 In the immediate we need to explore how best to deliver the leadership, coordination and resource capacity to meet the ambitions of this framework. This will include:
1. A capacity audit across key stakeholders to identify resource availability in terms of staffing and funding to deliver the framework;
  2. Detailed action planning by lead stakeholders with an immediate focus on short term actions;
  3. An options appraisal of strategic delivery and leadership approaches - options could include strengthening of existing organisational capacity; identifying theme leads; or exploring the potential for a new delivery body/vehicle with a focus on economic development; and
  4. A funding review to identify capacity funding options to underpin coordination activities as well as resourcing action frameworks.

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<sup>33</sup> Where LEPs are referred to within action frameworks throughout this document this terminology also applies to successor organisations/arrangements.

## 10 Monitoring and Review

10.1 This chapter deals with the approach to monitoring and review of the strategic economic framework.

### General principles

- 10.2 A joined-up approach to monitoring and review is vital given the number of stakeholders engaged. This will enable a shared and consistent understanding of progress. There is opportunity to integrate and align with monitoring activities for the Harlow EDS to deliver efficiency and consistency.
- 10.3 A process will be set in place for a high-level annual monitoring update with more substantive reviews at five-year intervals. Annual monitoring will feed into tactical adjustment, with the five-year reviews informing more substantive strategy updates.
- 10.4 Monitoring and review will draw on both qualitative and quantitative approaches. In the early years the focus will be on activity monitoring against the framework themes.
- 10.5 Effective monitoring and review will require appropriate resourcing and leadership. Partners will need to establish a lead body with sufficient capacity to deliver the monitoring and review requirements.

### Data limitations

- 10.6 Quantitative monitoring using official ONS datasets will be subject to some limitations and influences which are recognised:
1. In particular, HGGT is not a statistical entity in itself. Some key datasets only report at Local Authority District (LAD) level including the most complete measure of total jobs for local areas. This may require different approaches to build robust data or interpret available evidence. This might include using Harlow as a proxy for some indicators;
  2. There are timing lags, or infrequent releases of some datasets (e.g. Census of Population) which doesn't allow real time monitoring of progress. In some cases this may require local level monitoring of activity;
  3. In addition, economic performance will be influenced by wider influences including the global and national economic environment and policy approaches; and
  4. Individual datapoints should not be over interpreted. Local area data within national datasets can be volatile and based on relatively small sample sizes. There can also be 'lumpy' impacts on a range of indicators. The focus should therefore be on trends and patterns over time.

### Headline monitoring dashboard

- 10.7 At the core of this economic framework is developing a balanced community, with a significant step change in employment growth required. Tracking progress against these core aims should be at the heart of headline monitoring.
- 10.8 The following headline key performance indicators should be monitored:

- Dwellings completions
- Population change
- Jobs change<sup>34</sup>

- 10.9 A simple model to monitor the balance of jobs, population and dwellings will be useful to track progress against the balanced community ambition. This can be used to identify whether employment growth is keeping pace with residential development and be compared to the key milestones set out within the road map set out at Figure 3.
- 10.10 Sectoral performance will also need to be tracked to help understand the nature of change taking place and inform potential adjustments to theme level activities.

## Theme specific monitoring

- 10.11 Theme level monitoring will need to be focused on tracking progress against framework actions and objectives. However, monitoring arrangements must be put in place to collect and collate data to allow output tracking over time.
- 10.12 More detailed action level monitoring will be developed by action leads. As part of the five-yearly review cycle a deeper view on impact and outcomes will be appropriate.

## Inward Investment

- 10.13 In addition to tracking overall progress against the theme action framework and objectives, data will need to be collected on the number of enquiries received and the number, scale and type of projects secured.
- 10.14 It is acknowledged that there will be inward investments that are not recorded, particularly within SME sector, as they will take place without notification to public bodies. Therefore any data reporting is likely to be incomplete. However, it can be used to track engagement with targeted actions.

## Business and Innovation Support

- 10.15 The focus will be on tracking progress against the action framework and theme objectives. As part of developing detailed actions we need to develop systems to track engagement and take up of services to monitor reach, as well as exploring approaches for assessing effectiveness.
- 10.16 Analysis of published data on business start-up, survival and size will enable monitoring of overall progress.

## Employment Sites and Premises

- 10.17 Headline information will be available through the respective Authority Monitoring Report (AMR) preparation process for each of the district councils. This will enable analysis of site

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<sup>34</sup> Given limitations to official datasets this may require HGGT level data to be 'built' using fine grained data. Total jobs data could be constructed drawing on Inter Departmental Business Register (IDBR) data which is available to local authorities but is not publicly available. This would allow an estimate of total employment to be constructed for a bespoke geography. This would likely provide a more robust estimate than the Business Register and Employment Survey (BRES) which can be subject to heavy rounding or the Jobs Density (Total Jobs) measure which is not available below local authority level.

delivery and availability. This will be supplemented with qualitative analysis to identify effective supply.

- 10.18 A protocol will be established for tracking enquiries, and particularly unsatisfied enquiries where sites and premises availability is a key concern.
- 10.19 Consistent information and communication will be critical within this theme given the three local planning authorities and wide range of stakeholders.

### **Skills and Training**

- 10.20 As well as qualitative tracking of progress against the action framework wider monitoring of data to understand whether Harlow residents are benefiting from the growth opportunities arising from HGGT will be central. This will include tracking indicators such as labour force participation (economic activity and employment rates) as well as qualification profile and earnings data. This will be monitored to identify whether gaps with sub-regional and national benchmarks are closing.
- 10.21 As set out within the action framework, developing intelligence on skills gaps tracking will be required to ensure training provision can respond to need in a timely manner.

### **Community Wealth Building**

- 10.22 This theme will require local 'bottom up' monitoring, building from project and action level data capture in terms of social value secured. It is therefore vital that a meaningful tracking and monitoring function is established to ensure delivery of social value which is set out in developer agreements.

## Appendix 1. Policy Summary

- A1.1 Existing policy and strategy set out a range of underlying principles for HGGT. The driving force for the HGGT is the ambition to strengthen and grow the Harlow economy, transforming the town into a place with a strong enterprise environment and building it into a well-designed community where everyone can thrive.
- A1.2 Key principles set out within the HGGT Vision document relevant to economy and employment include the need to be:
- Adaptable – able to respond to economic shifts and emergence of new sectors;
  - Sustainable – people inspired to work locally and encourage travel actively; and
  - Innovative – spearheading nation’s response to UK Industrial Strategy.
- A1.3 The principles underlie the strategies and policies set out by HGGT and align with relevant Local Plans of Harlow, Epping Forest and East Hertfordshire. The policies set out the objective to support inclusive economic growth by building on, promoting, and expanding Harlow’s creativity, innovation, and sustainability assets.

### Innovation and key sectors

- A1.4 Across the HGGT Vision, Employment Commission, Transport Statement, and Sustainability Guidance documents there is a consistent collective ambition to foster economic growth and sustainable development through creating opportunities for businesses and people to grow, relocate, and expand. The HGGT documents also align with the ideas and objectives presented in relevant Local Plans and Economic Strategies, which position HGGT as a future place of economic sustainability, inclusivity, and prosperity at the heart of the UK Innovation Corridor.
- A1.5 Relevant Local Plans and the Harlow Economic Development Strategy recognise that enterprise and innovation are primary drivers of strong economies. Harlow already has significant strengths and innovation assets in key sectors of life sciences, advanced manufacturing, and Digital/ICT, and has the potential to grow as a location for world class knowledge-based businesses. Additionally, there is a large focus on building the Digital Innovation Zone with gigabit capable broadband infrastructure, to further support the digital/ICT sector and drive economic growth.
- A1.6 Across the relevant documentation is a clear articulation of the opportunities surrounding Harlow’s key sectors alongside the potential to capitalise on the locational advantage of being situated between the global cities of London and Cambridge to facilitate continued investment and innovation. Harlow’s previous Economic Development Strategy (2017) puts forward the idea that ‘innovation will continue to be the hallmark of Harlow’s Economy’, creating a diverse employment base and an environment for businesses to locate and thrive. Building this reputation for innovation is also a key aspect of Harlow’s Local Plan and the HGGT Vision.
- A1.7 To build upon the innovation and sectoral opportunities, key investments in Harlow are being delivered which are located within the Harlow Enterprise Zone. Investments are being made in the Harlow Innovation Park with the Anglia Ruskin MedTech Innovation Centre, Kao Park, the potential relocation of UK Health Security Agency (formerly Public Health England),

and the confirmed new Princess Alexandra Hospital to help develop Harlow into a leading science and technology-based economy.

- A1.8 The Harlow Economic Development Strategy (EDS) (2023 - 2028) notes that since the last strategy, Harlow has secured investment through the Towns Fund, UK Shared Prosperity Fund and Community Renewal Fund, amongst others, to improve infrastructure for local businesses. The EDS carries over the ambitions and visions of relevant policy documents, articulating that creating jobs is the key priority for the next 5-year period. To enable economic success and support a balanced community, the Strategy revolves around 2 core themes:
- Resourcing and partnership for growth: to identify opportunities for collaboration and investment to achieve wider ambitions of business, productivity, and employment growth.
  - Competitiveness for growth: to promote and support Harlow Innovation Park and the Enterprise Zone as priority locations for high value employment generation.
- A1.9 The EDS also aims to ensure Harlow capitalises on the economic opportunities generated in the transition to net zero, ensuring that HGGT plans align with the Council to deliver maximum social and economic benefits to the community and its future residents.

### Town Centre regeneration

- A1.10 As well as key employment sites, HGGT has a key ambition to create a vibrant and resilient town centre at the heart of the Garden Town. HGGT aim to deliver this by providing high quality homes, shops, and workspaces which will enable business activity and attract people to live and work in the area.
- A1.11 Regeneration of the town centre is an important part of HGGT's future growth ambitions, and delivering this is set to boost the local economy for residents and visitors and welcome SME start-ups and entrepreneurialism. HGGT documents and relevant strategies aim to establish the town centre as a cultural and commercial core.
- A1.12 A Harlow Town Centre Masterplan Framework has been produced which identifies opportunity areas for regeneration and investments into the Town Centre are progressing in support of achieving HGGT's economic growth ambition.
- A1.13 The Harlow Town Investment Plan notes that a core initiative is to redesign the town centres as places that are easily accessible, where employment and services are in close proximity, so residents have options for flexible working.
- A1.14 The HGGT have already secured funding (from the UK Governments Towns Fund) for 3 proposed town centre regeneration projects, and have also secured funding from the Housing Infrastructure Funds and Levelling Up Funds to support developments within the Garden Towns.

### Sustainability

- A1.15 Sustainability is deeply rooted within HGGT principles and ambitions, with strategies consistently interlinking the notion with economic development. The HGGT Vision and Transport Strategy indicate that the Garden Communities will be joint with sustainable transport corridors, allowing for wide accessibility to local residents and visitors.

- A1.16 Ambitions of building Harlow into a place of good design are coherent across relevant policy, where providing greater proximity and access to leisure and recreation, workspaces, and green spaces will deliver more opportunities for people to live and work within the Garden Town. This will allow for adaptability and the option for flexible working amongst residents, helping to facilitate ongoing economic growth and prosperity.
- A1.17 The strategies for HGGT build upon the ideas of creating walkable neighbourhoods and make clear that a hierarchy of importance for travel needs should influence HGGT activity: reducing the need to travel, encouraging walking and cycling; using public; transport; moving away from private vehicle use.

### **Documents summarised:**

- HGGT Vision and Design Guide
- HGGT Employment Commission 2020
- HGGT Transport Strategy 2022
- HGGT Sustainability Guidance and Developer Checklist 2022
- Harlow Corporate Strategy 2021-23
- Harlow Economic Development Strategy 2017
- Harlow Economic Development Strategy 2023-2028
- Harlow Town Investment Plan (as produced for the Towns Fund bid)
- Local Plan for East Herts and Harlow and supporting evidence
- Local Plan for Epping Forest
- Harlow Town Plan
- Harlow Future Prospects Study 2013
- Essex County Council Sectoral Development Strategy 2022
- Essex County Council 'Desired economic development outcomes and guidance for major developments'
- Essex County Council Economic Growth Plan
- Everyone's Essex
- Hertfordshire County Council Corporate Plan 2022
- Hertfordshire Enterprise and Innovation Strategy 2021
- Essex and Herts Digital Innovation Zone – Digital Strategy

## Appendix 2. Methodology and Results

A2.1 The following note sets out the approach to modelling the economic road map and employment land requirement for the Harlow and Gilston Garden Town (HGTT) area.

### Dwelling Numbers

A2.2 Housing numbers and delivery trajectory information has been obtained from the Local Plans for each of the local authority areas that comprise HGTT. Where possible these figures have been adjusted based on the latest information available from each of the local authorities including approved planning applications. This information is summarised in the following table.

**Table 4 Total Dwelling Numbers and Trajectory for HGTT**

	2023-28	2028-33	2033-38	2038-45	Total
Dwellings	4,400	7,200	4,300	3,700	19,500

### Housing-led Jobs (Top Down Approach)

A2.3 Three methods have been used to calculate the number of jobs required at HGTT:

- Demographic Led
- Workers per Dwelling
- Jobs per Dwelling

A2.4 This is in-line with the approach adopted in the previous HGTT Employment Commission report<sup>35</sup>.

#### Demographic Led

A2.5 This approach considers the future changes in the working population of Harlow based on:

- West Essex and East Hertfordshire Strategic Housing Market Assessment<sup>36</sup> on future average household size;
- 2018-based Sub National Population Projections (SNPP) on working age population share;
- Sub National Population Projections (SNPP), Office for Budget Responsibility and ONS Annual Population Survey (APS) on economic activity rates; and
- HJA assumptions on unemployment rates based on APS.

A2.6 This approach results in a total jobs requirement of 23,600 for the period 2023 – 45.

<sup>35</sup> Hardisty Jones Associates (2020) Harlow & Gilston Garden Town Employment Commission

<sup>36</sup> Opinion Research Services (2017) West Essex and East Hertfordshire Strategic Housing Market Assessment: Establishing the Full Objectively Assessed Need



## Workers per Dwelling

A2.7 This approach uses data on the number of dwellings and the number of people in employment from the latest Census (2021) to calculate a workers per dwelling figure. This is used as a fixed assumption for the period 2023 – 2045.

A2.8 This results in a total jobs requirement of 22,200 for the period.

## Jobs per Dwelling

A2.9 Similar to the above approach, this method uses data on the number of jobs (sourced from Jobs Density data) and the number of dwellings to calculate a jobs per dwelling figure. This is used as a fixed assumption for the period 2023 – 2045.

A2.10 This results in a total jobs requirement of 23,700 for the period.

## Summary

A2.11 The three approaches provide a range for jobs required in HGGT of between 22,150 and 23,710 over the period 2023 – 2045. The results of the three approaches divided into three five-year period and the remaining seven years to 2045, are presented in the figure below.

**Table 5 Jobs Required in HGGT**

	2023-28	2028-33	2033-38	2038-45	Total
Demographic Led	5,300	8,700	5,200	4,500	23,800
Workers per Dwelling	5,000	8,200	4,900	4,200	22,300
Jobs per Dwelling	5,400	8,700	5,200	3,400	22,700
<b>Average</b>	<b>5,200</b>	<b>8,500</b>	<b>5,100</b>	<b>4,000</b>	<b>22,900</b>

A2.12 The above analysis shows that jobs requirements range from 22,300 and 23,800, with the largest requirement occurring in the period 2028 – 33.

## Employment Forecasting (Bottom Up Approach)

A2.13 Employment forecasts for the three local authority areas have been obtained from the East of England Forecasting Model (EEFM) 2019.

A2.14 These forecasts have been adjusted to the 'preferred scenario' as set out in the West Essex and East Hertfordshire Assessment of Employment Needs (2017)<sup>37</sup>. This is considered the **baseline scenario** for the purposes of this report.

A2.15 The **baseline scenario** adjusts the EEFM employment forecasts to account for:

- The relocation of UKHSA (UK Health Security Agency) to Harlow
- Stansted Airport growth plans
- Harlow Enterprise Zone proposals

<sup>37</sup> Hardisty Jones Associates (2017) West Essex and East Hertfordshire Assessment of Employment Needs. Adopting a consistent approach aligns this analysis with the evidence base for the respective Local Plans and HGGT Employment Commission.

- Additional service sector employment due to higher population growth

## Relocation of UKHSA

A2.16 The direct effects of the potential relocation of UKHSA will impact workplace data for Harlow only<sup>38</sup>. The latest government figures suggest that there will be 2,750 staff based at the new site by 2031<sup>39</sup>.

A2.17 Following informal consultation with UKHSA it was noted that the scale of any relocation is now expected to be smaller. On this basis the figure for total jobs relocated has been reduced to 2,000 people. It is assumed jobs begin to arrive in Harlow in 2028 and reach 2,000 by 2034 based on information provided informally by UKHSA. It is assumed these roles will be distributed across both the Research & Development and Public Administration sectors in keeping with current UKHSA employment.

## Stansted Airport

A2.18 Analysis of the impacts of an expanded Stansted Airport<sup>40</sup> indicates that there will be displacement of employment from the three local authority areas into Uttlesford. These impacts were forecast to begin in 2012. By 2023, employment was forecast to be reduced by 630 across the HGGT area. This was forecast to reach 990 by 2033. It is assumed this remains stable across the remaining forecast period up to 2045. Therefore, employment between 2023 and 2045 is forecast to decline by a further 360.

A2.19 Employment is forecast to decline in Retail, Land Transport, Business Services, Employment Activities, Arts & Entertainment, and Other Services.

## Harlow Enterprise Zone

A2.20 Harlow has a designated Enterprise Zone across three sites. The 2017 West Essex and East Hertfordshire Assessment of Employment Needs (2017) assumed an uplift of 2,500 jobs in Harlow to account for the Enterprise Zone. These impacts were forecast to begin in 2019. By 2023, employment was forecast to have increase by 830 across the Telecoms, Computer Related Activities, Professional Services, Research & Development and Business Services sectors.

A2.21 Employment is assumed to reach 2,500 by 2033 and remain at this level up to the end of the forecast period (2045). Therefore, an increase of 1,670 is forecast between 2023 and 2045.

## Additional Service Sector Employment

A2.22 The population assumptions underlying the EEFM used in this analysis assume a lower overall population than the population projections underlying the analysis set out within ORS Updating of Overall Housing Need (2016)<sup>41</sup> over the period 2023 to 2033.

<sup>38</sup> The workforce effects will be felt more widely than Harlow, as will indirect and induced impacts.

<sup>39</sup> Source: <https://www.gov.uk/government/publications/phe-harlow-science-hub-proposals/phe-harlow-science-hub-proposals#jobs-and-training> [Accessed 16 May 2023]. Previous coverage indicated total employees at the site could rise to ~3,250 over time.

<sup>40</sup> Oxford Economics (2013) Economic Impact of Stansted Scenarios

<sup>41</sup> Opinion Research Services (2016) Updating the Overall Housing Need: Based on 2014-based Projections for West Essex & East Herts

A2.23 A larger population will result in additional demands for services impacting the Retail, Accommodation & Food Services, Education, Health & Care, Arts & Entertainment, and Other Services sectors.

A2.24 To account for this, ORS population assumptions have been extended to 2045 using the average annual growth rate between 2023 and 2033. The difference in the population estimates between 2023 and 2045 are then calculated in order to estimate the additional employment across the services sectors.

A2.25 Over the period 2023 – 2045 this results in a total increase of 9,800 jobs.

### Allocation of Baseline Scenario

A2.26 The above scenario covers the three local authority areas of East Hertfordshire, Epping Forest and Harlow. Whilst the entirety of Harlow lies within the HGGT, only a proportion of the two other local authorities falls within the HGGT boundary.

A2.27 The proportion of forecast employment growth within East Hertfordshire and Epping Forest that will occur within HGGT has been estimated based on the proportion of total dwellings in each local authority area that will be delivered in the HGGT area over the period 2023 – 2033.

A2.28 This results in 22% of employment growth in East Hertfordshire and 40% of employment growth in Epping Forest being allocated to the HGGT area. This is used as a fixed assumption over the period 2023 – 2045.

### Adjusted Scenario

A2.29 A review of the **baseline scenario** indicates it likely underestimates the employment generated in the HGGT area as a result of the need to provide additional services to the new residents of HGGT.

A2.30 The **baseline scenario** has been adjusted to account for the additional employment that will be introduced to the HGGT area through the provision of service infrastructure to meet the needs of additional residents. This is set out in the Infrastructure Delivery Plan (IDP) 2022. This scenario is called the **baseline + IDP scenario**.

A2.31 It is not possible to forecast all the employment that will result from additional infrastructure, so the focus is on anticipated employment change in the Health and Education sectors.

A2.32 It is estimated an additional 1,600 jobs will be required in the HGGT within the Health and Education sectors over the period 2023 – 2045. Given the inability to forecast all jobs growth in the area this figure should be seen as a minimum uplift.

### Summary

A2.33 The following table shows the employment forecasts resulting from the **baseline scenario** and the **baseline + IDP scenario**.

**Table 6 Employment Change in HGGT Area**

	2023-28	2028-33	2033-38	2038-45	Total
Baseline Scenario	4,500	5,600	3,700	4,500	18,000
Baseline + IDP Scenario	4,900	6,200	4,100	4,700	20,000

## Closing the Gap

A2.34 Comparing the average number of jobs required in the HGGT area (23,000) with the **baseline + IDP scenario** which yields 20,000 jobs shows there is a discrepancy of 3,000 jobs.

A2.35 Given the ambition for the HGGT area to achieve balanced growth we have examined the impact of both the **baseline + IDP scenario** and the gap between this scenario and the jobs requirements for HGGT based on housing growth.

A2.36 Employment land forecasts for both the **baseline scenario** and the **baseline + IDP scenario** will differ by only a small amount as the later includes additional Health and Education employment which do not have large employment land implications. However, we have used the **baseline + IDP scenario** to forecast employment land requirements as it will be important to ensure there is sufficient land to provide service infrastructure for HGGT.

## Calculating the Gap

A2.37 To calculate the gap between jobs and employment we have used the average of the jobs required under the three approaches (23,000) compared with the employment figures in the **baseline + IDP scenario** of 20,000.

A2.38 Modelling has been undertaken in five year intervals between 2023 and 2038, and then for the remaining seven years. The difference between the average of jobs required and the **baseline + IDP scenario** for these intervals is shown in the figure below.

**Table 7 Gap Between Jobs Requirement and Baseline +IDP Scenario**

	2023-28	2028-33	2033-38	2038-45	Total
Average Jobs Required	5,200	8,500	5,100	4,000	23,000
Baseline + IDP Employment	4,900	6,200	4,100	4,700	20,000
Gap	400	2,400	1,000	(700)	3,100

## Employment Land Forecasting

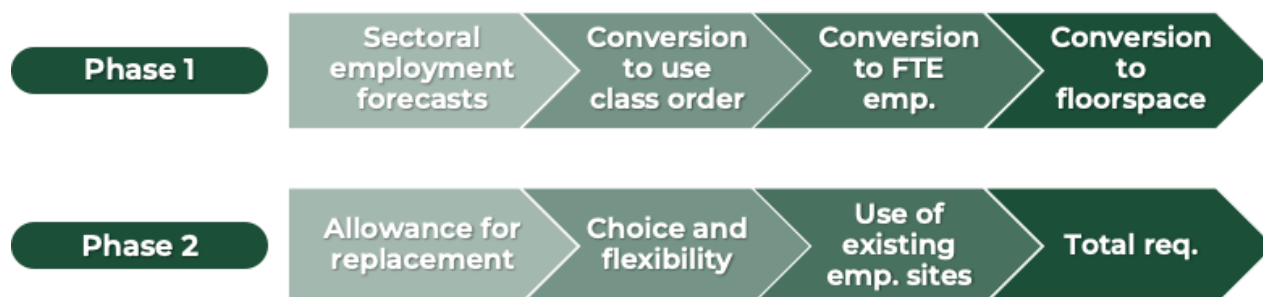
A2.39 Employment from both **baseline + IDP scenario** and the **gap** have been converted to employment land based on the approach set out below.

### Approach

A2.40 The approach adopted to estimate employment land requirements is broadly consistent with that used in the previous employment study. Data has been updated where possible to account for changes in the local area.

A2.41 The figure below provides a summary diagram of the approach adopted to assess future sites and premises requirements.

**Figure 7 Approach to modelling sites and premises requirements**



A2.42 Phase 1 takes account of the net changes in the economy i.e. the growth and decline of particular sectors. The sectoral employment projections are converted to Use Classes. This provides an indication of the spread of future employment change across the full range of planning Use Classes and none. From that point onward the focus is upon Use Classes E(g), B2, and B8, with other elements of the evidence base more suited to informing the detailed requirements for C, other E uses except for E(g), and Sui Generis. The net employment changes in the E(g), B2, and B8 Use Classes are then converted to property and land requirements using employment and development density assumptions.

A2.43 Phase 2 then considers wider market factors, particularly the need to recognise the churn in the economy and the associated need to replace and upgrade property stocks. For example, whilst the manufacturing sector as a whole has experienced well-documented decline in its employment base, there has been a continued demand for new premises within which to operate. This demand can be driven by existing companies needing more/less space, a different location, or a different type of premises. It can also be driven by new companies in the market, which may not find the right type of property available in the right location within the market. As a result, whilst overall a sector may be in decline (although this still applies to growing sectors too), there are changes beneath the surface that continue to drive demand. This can be a particular issue where existing stocks are ageing or where vacant sites are no longer in the locations that are suitable to modern occupiers. This also ensures provision is made for replacing sites that might be lost from employment use to other uses. Also, within Phase 2 the assessment builds in an allowance for choice and flexibility. This element needs to take account of offering location choice as well as choice in terms of the type of property and setting.

### Phase 1: Net Additional Requirement

A2.44 The first step is to allocate the employment gap per period to employment sectors. This is allocated on the basis of the distribution of employment in the **baseline + IDP scenario** across sectors in the related time period. This allows for macro-trends in the movement of labour across sectors to be reflected in the gap analysis.

A2.45 There are three stages to converting employment to floorspace requirements. The assumptions used to undertake this conversion are set out below.

### SIC to Use Class Matrix

10.23 Employment change by sector has been converted to Use Class order using the matrix set out in Table 16 at the end of this appendix. Converting sectoral employment to Use Classes requires a level of subjective assumption. This has been undertaken using a three-step approach.

- *Step One* is a standardised matrix, which allocates employment in each 4 digit SIC sector of the economy to one or more Use Classes. For example, manufacturing activities are allocated 100% to B2. Consideration is also given to peripatetic working where workers may not require any employment land to undertake their business activity. For example, General Cleaning of Buildings is allocated 10% to E(G)(i) (representing the management activities of such a company) and 90% to 'none' as cleaners will be involved in cleaning locations other than their own workplace.
- *Step Two* adjusts for local patterns of homeworking. This utilises data drawn from the 2011 Census of Population for the three local authorities that comprise the HGGT area. This data has been adjusted to 2019 figures (prior to the Covid-19 pandemic) by inflating the figures by the increase seen in homeworking over the period 2011 – 2019 seen across the UK. This identifies the percentage of jobs in each sector that are fulfilled through homeworking. For example, 15% of manufacturing workers list homeworking. Therefore, the master matrix is adjusted so that 85% of jobs are in B2 and 15% homeworking.
- *Step Three* weights the matrix to the local area. That is, the East of England Forecasting Model (EEFM) provides data for 31 sectors, each of these comprises a number of fine grained 4-digit SIC sectors. The employment data for the more than 600 4-digit SIC sectors is fed into the stage two matrix, to generate a weighted matrix for the 31 EEFM sectors. This is necessary to ensure the matrix is appropriate to the local area.

### Conversion to FTE Employment

A2.46 Employment figures are converted to full-time equivalents (FTEs) to facilitate the use of data on employment density which is provided per FTE.

A2.47 The conversion rates used are the same as in the previous Employment Commission, and are based on two part-time workers being equivalent to one full-time worker.

### Conversion to Floorspace

A2.48 Floorspace per worker assumptions are based on the HCA Employment Density Guide (2015)<sup>42</sup>. This assumes a direct link between employment and floorspace requirements.

A2.49 The assumptions used are the same as in the previous Employment Commission report.

### Results

A2.50 The results of the first phase of modelling are presented in Table 8.

<sup>42</sup> Homes and Communities Agency (2015) Employment Density Guide: 3<sup>rd</sup> Edition

**Table 8 Net Additional Floorspace Requirement 2023 - 45 (Sq m)**

	Baseline + IDP	Gap	Total
E(g)(i)	37,300	5,600	<b>42,900</b>
E(g)(ii)	57,300	5,200	<b>62,500</b>
<b>Offices</b>	<b>94,600</b>	<b>10,800</b>	<b>105,400</b>
E(g)(iii)	700	200	<b>1,000</b>
B2	(6,000)	4,600	<b>(1,400)</b>
<b>General Industrial</b>	<b>(5,300)</b>	<b>4,800</b>	<b>(400)</b>
B8	3,600	13,400	<b>17,000</b>
<b>Warehousing &amp; Logistics</b>	<b>3,600</b>	<b>13,400</b>	<b>17,000</b>

A2.51 The figure above shows a decline in requirement for General Industrial and space under the **baseline + IDP scenario**. This is not an unusual finding as employment in the sectors that significantly influence this Use Class (Manufacturing) is forecast to remain broadly the same or decline. This does not mean there is no demand for this type of space, simply that employment growth is not the primary driver of this demand.

A2.52 The **gap analysis** shows a positive requirement for employment floorspace across all Use Classes. This is because the additional jobs required as a result of the gap are distributed across all employment sectors according to the forecast distribution of employment across sectors in that time period. This means that unless there is no employment in a sector then some of the employment in the gap will be allocated to the sector.

## Phase 2: Total Requirement

A2.53 Three adjustments must be made to convert the results of phase one into an overall employment floorspace requirement. The assumptions used to undertake this conversion are set out below.

### Replacement

A2.54 Data on the stock of employment land in each category in Harlow has been estimated from the VOA (Valuation Office Agency) Non-Domestic Ratings List (2023).

A2.55 We have assumed a total 1% replacement rate per annum across both scenarios as this is place based rather than scenario dependent.

### Flexibility

A2.56 A choice and flexibility allowance of 10% has been added to the requirement in-line with the previous employment study.

### Use of existing employment sites

A2.57 A proportion of the floorspace requirements will be built on brownfield land that is already part of the employment land stock. This means that not all the employment land requirement needs to be met with new land supply.

A2.58 Data analysis and discussion with local authorities was undertaken in the previous employment land study to understand the volume of B-Use Class premises had been constructed on existing B-Use Class land in the previous five-to-ten-year span. This resulted in the following assumptions.

**Table 9 Use of Existing Sites Assumptions in Previous Study**

Time Period	Harlow
2016 – 2033	70%
Post 2033	40%

A2.59 This work has not been updated for this analysis Therefore, we have assumed 70% of supply is delivered on existing sites up to 2033, and 40% post 2033.

### Results

A2.60 The total floorspace requirement following these allowances are set out in the tables below.

**Table 10 Total Office Floorspace Requirement 2023 - 2045 (Sq m)**

	Baseline + IDP	Gap	Total
Net Additional Requirement	95,000	11,000	<b>105,000</b>
Replacement Provision	23,000	-	<b>23,000</b>
<b>Gross Requirement</b>	<b>118,000</b>	<b>12,000</b>	<b>128,000</b>
Flexibility Allowance	12,000	1,000	<b>13,000</b>
<b>Total Requirement</b>	<b>129,000</b>	<b>13,000</b>	<b>141,000</b>
Delivered on Existing Employment Sites	80,000	8,000	<b>88,000</b>
<b>Net Requirement (on new sites)</b>	<b>50,000</b>	<b>4,000</b>	<b>54,000</b>

\*Totals may not sum due to rounding

A2.61 The total office floorspace requirement is 54,000 sq m including 50,000 from the **baseline + IDP scenario** and an additional 4,000 sq m from the **gap analysis**.



**Table 11 Total General Industrial Floorspace Requirement 2023 - 2045 (Sq m)**

	Baseline + IDP	Gap	Total
Net Additional Requirement	(5,000)	5,000	<500
Replacement Provision	61,000	-	61,000
<b>Gross Requirement</b>	<b>56,000</b>	<b>5,000</b>	<b>60,000</b>
Flexibility Allowance	6,000	<500	6,000
<b>Total Requirement</b>	<b>61,000</b>	<b>5,000</b>	<b>66,000</b>
Delivered on Existing Employment Sites	34,000	4,000	38,000
<b>Net Requirement (on new sites)</b>	<b>27,000</b>	<b>1,000</b>	<b>28,000</b>

\*Totals may not sum due to rounding

A2.62 The total general industrial floorspace requirement is 28,000 sq m including 27,000 from the **baseline + IDP scenario** and an additional 1,000 sq m from the **gap analysis**.

**Table 12 Total Warehousing & Logistics Floorspace Requirement 2023 - 2045 (Sq m)**

	Baseline + IDP	Gap	Total
Net Additional Requirement	4,000	13,000	17,000
Replacement Provision	104,000	-	104,000
<b>Gross Requirement</b>	<b>107,000</b>	<b>13,000</b>	<b>121,000</b>
Flexibility allowance	11,000	1,000	12,000
<b>Total Requirement</b>	<b>120,000</b>	<b>15,000</b>	<b>133,000</b>
Delivered on Existing Employment Sites	64,000	10,000	74,000
<b>Net Requirement (on new sites)</b>	<b>54,000</b>	<b>4,000</b>	<b>58,000</b>

\*Totals may not sum due to rounding

A2.63 The total warehousing & logistics floorspace requirement is 58,000 sq m including 54,000 sq m from the **baseline + IDP scenario** and an additional 4,000 sq m from the **gap analysis**.

## Employment Land Requirements

A2.64 To convert floorspace into land requirements requires the use of development density assumptions. The previous report used a development density range of 40% to 100% for office space, and 40% for industrial space. Warehousing and logistics space was reported as part of the industrial figure.

A2.65 This report uses the same development densities for office space. However, it uses 40% for general industrial and 35% for warehouse and logistics space.

A2.66 For offices, requirements are best reported in terms of floorspace for planning purposes, as varying development densities generated by different types of office developments can create large ranges e.g. the differing nature of multi-storey development 'in-town' (typically with a development density of 100%+) and fewer storeys 'out-of-town' (typically with

development densities of ~40%). We have presented a range to reflect the variation of development densities with the lower end of the range reflecting all office floorspace requirements built at 100% density, and the higher end of the range reflecting all offices built at 40% density.

## Results

A2.67 The overall land requirement for the **baseline + IDP scenario** is presented in the table below. It is also shown for five-year blocks between 2023 and 2038, and then for the remaining period up to 2045.

**Table 13 Total Land Requirement for the Baseline + IDP Scenario (ha)**

	2023-28	2028-33	2033-38	2038-45	Total
Offices	1.0 – 2.4	1.8 – 4.6	1.2 – 2.9	1.0 – 2.5	5.0 – 12.4
General Industrial	1.2	1.3	1.7	2.5	6.7
Warehousing & Logistics	2.5	2.3	4.5	6.2	15.5
<b>Total</b>	<b>4.6 – 6.1</b>	<b>5.4 – 8.2</b>	<b>7.4 – 9.1</b>	<b>9.7 – 11.2</b>	<b>27.0 – 34.6</b>

\*Numbers may not sum due to rounding

A2.68 The overall land requirement for the **gap analysis** is presented in the table below. It is also shown for five-year blocks between 2023 and 2038, and then for the remaining period up to 2045.

**Table 14 Total Land Requirement for the Gap Analysis (ha)**

	2023-28	2028-33	2033-38	2038-45	Total
Offices	0.0 – 0.1	0.3 – 0.7	0.2 – 0.6	(0.2) – (0.5)	0.4 – 1.0
General Industrial	0.1	0.4	0.2	(0.3)	0.4
Warehousing & Logistics	0.2	1.1	0.7	(0.8)	1.2
<b>Total</b>	<b>0.3 – 0.4</b>	<b>1.7 – 2.2</b>	<b>1.2 – 1.5</b>	<b>(1.2) – (1.5)</b>	<b>2.0 – 2.6</b>

\*Numbers may not sum due to rounding

A2.69 The overall land requirement for combining both the above scenarios is presented in the table below. It is also shown for five-year blocks between 2023 and 2038, and then for the remaining period up to 2045.

**Table 15 Total Overall Land Requirements Combining Both Scenarios (ha)**

	2023-28	2028-33	2033-38	2038-45	Total
Offices	1.0 – 2.5	2.1 – 5.3	1.4 – 3.5	0.8 – 2.0	5.3 – 13.3
General Industrial	1.2	1.6	2.0	2.2	7.1
Warehousing & Logistics	2.7	3.4	5.2	5.4	16.7
<b>Total</b>	<b>4.9 – 6.4</b>	<b>7.2 – 10.4</b>	<b>8.6 – 10.7</b>	<b>8.5 – 9.6</b>	<b>29.1 – 37.1</b>

\* Numbers may not sum due to rounding

A2.70 The table above shows that the overall land requirement when combining the **baseline + IDP scenario** and the **gap analysis** is between 29.1 and 37.1 ha over the period 2023 – 2045.

A2.71 The largest land requirement comes from Warehousing & Logistics which totals over 16 ha over the period 2023 – 2045.

A2.72 The period 2033 – 2038 sees the largest land requirement of any period with a maximum requirement of over 10 ha in the five year period.

## Backlog

A2.73 According to modelling underpinning the Harlow and Gilston Garden Town Employment Commission (March 2020), a requirement of 76,400 sq m of employment floorspace (B1/B2/B8) was identified during the period 2016–2023. This requirement includes replacement needs.

A2.74 Based on information provided by local council officers, an indicative 20,800 sq m of employment floorspace has been delivered on allocated sites during the period 2016–2023. It is important to note this figure is indicative (based on assumed development densities), and does not include employment floorspace that may have been delivered on unallocated sites. Nevertheless, this suggests there has been a shortfall in employment floorspace delivery to this point in the plan period. Despite challenging employment growth thus far negating some of the net additional floorspace requirements from changes in the economy, the replacement requirement over this period will have been unmet. As such, employment floorspace delivery at this point of the plan period is likely to be in a net negative position.

A2.75 The weak commercial development market for some property types as well as constrained supply may, in part, have limited new development. Replacement of aged and dilapidated stocks does not take place in a linear or evenly spread timeline. Therefore some adjustment for enabling this undelivered requirement is appropriate. Based on a 40% development density this backlog is estimated at up to 14 hectares.

Table 16 SIC Use Class Matrix

	A1	A2	A3-5	E(g)(i)	E(g)(ii)	E(g)(iii)	B2	B8	C1	C2	C3	D1	D2	SG	None & Homeworking
Agriculture	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Mining & quarrying	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Manufacturing - food manufacturing	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%	0%	0%	0%	0%	15%
Manufacturing - general manufacturing	0%	0%	0%	0%	0%	3%	79%	0%	0%	0%	0%	0%	0%	0%	18%
Manufacturing - chemicals only	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%	0%	0%	0%	0%	15%
Manufacturing - pharmaceuticals	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%	0%	0%	0%	0%	15%
Manufacturing - metals manufacturing	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%	0%	0%	0%	0%	15%
Manufacturing - transport equipment	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%	0%	0%	0%	0%	15%
Manufacturing - electronics	0%	0%	0%	0%	0%	0%	85%	0%	0%	0%	0%	0%	0%	0%	15%
Utilities	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	68%	32%
Waste & remediation	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	68%	32%
Construction	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	95%
Wholesale	2%	0%	0%	2%	0%	0%	0%	61%	0%	0%	0%	0%	0%	23%	13%
Retail	79%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	1%	16%
Land transport	0%	0%	0%	11%	0%	0%	0%	47%	0%	0%	0%	0%	0%	1%	41%
Water & air transport	0%	0%	0%	0%	0%	0%	0%	22%	0%	0%	0%	0%	0%	0%	78%
Accommodation & food services	9%	0%	58%	0%	0%	1%	0%	0%	12%	0%	0%	0%	0%	0%	20%
Publishing & broadcasting	0%	0%	0%	57%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	23%
Telecoms	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
Computer related activity	0%	0%	0%	74%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	23%
Finance	0%	20%	0%	69%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%
Real estate	0%	19%	0%	56%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%
Professional services	0%	2%	0%	75%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	22%
Research & development	0%	0%	0%	1%	77%	0%	0%	0%	0%	0%	0%	0%	0%	0%	22%
Business services	0%	0%	0%	26%	3%	1%	0%	0%	0%	0%	0%	0%	0%	6%	61%
Employment activities	15%	0%	6%	8%	0%	0%	11%	9%	2%	7%	0%	18%	0%	1%	24%
Public administration	0%	0%	0%	69%	0%	0%	0%	0%	0%	0%	0%	22%	0%	0%	9%
Education	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	88%	0%	0%	12%
Health & care	0%	0%	0%	9%	0%	0%	0%	0%	0%	49%	0%	32%	0%	0%	9%
Arts & entertainment	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%	57%	20%	18%
Other services	46%	0%	0%	11%	0%	0%	0%	0%	0%	0%	0%	8%	0%	8%	27%
TOTAL	9%	1%	4%	16%	1%	0%	5%	8%	1%	6%	0%	13%	2%	4%	31%

## Appendix 3. Employment Land Supply Summary

### Current Allocated Supply

- A3.1 Table 18 (overleaf) summarises the current employment land allocations which can play a role in meeting the requirements associated with HGGT. The table also sets out the development that has taken place since allocation and considers any potential constraints. Relevant sites identified in the local plans for Harlow, Epping Forest District, and East Herts District are considered.
- A3.2 The Gilston Area site(s) have had recent outline application approvals and are subject to Head of Terms.
- A3.3 Whilst there is some uncertainty over delivery of both allocated sites at Dorrington Farm due to a change of landowner circumstances since the original allocation, Epping Forest District Council remain confident of deliverability.
- A3.4 In aggregate a total of 28.0 ha of relevant employment land has been allocated within the three local plans under consideration. Accounting for site delivery since allocation, there is a total of 22.3 ha of allocated employment land remaining. When accounting for potential delivery constraints, there is 13.0<sup>43</sup> – 17.0 ha of total effective supply of allocated land remaining.

### Additional Opportunities

- A3.5 In addition to the employment land identified above, the Harlow Local Plan notes that there are opportunities for office floorspace in Harlow Town Centre. Opportunity areas have been identified in the Harlow Town Centre Masterplan Framework and Table 17 presents the opportunity areas that have indicative capacity estimates for workspace, in which there is an aggregate total of 16,400sqm.

**Table 17: Opportunity areas within Harlow Town Centre for workspace**

Opportunity Area (OA) – Site name	Indicative capacity estimate for workspace (sqm)
OA2 – Wych Elm	7,700
OA3 – Town Centre North	2,800
OA4 – Sustainable Transport Hub	5,800
Retail Core 1 – Harvey Centre	100
Total Workspace Supply Estimate	16,400

- 10.24 There is a further opportunity for E(g)/B2/B8 floorspace delivery at North Weald Airfield. The draft Emerging Strategic Masterplan for North Weald, approved by Epping Forest District

<sup>43</sup> This represents the 'worst case' situation where the employment provision which is subject to review within the Gilston Villages is not delivered.



Council in March 2023, sets out provision for approximately 10 ha of new employment floorspace, comprising a mix of industrial and warehouse uses.

Table 18: Allocated Employment Sites

Site name	Policy ref.	Use allocation	Size	Progress and current status
<b>Harlow<sup>44</sup></b>				
Harlow Business Park, The Pinnacles	ED1-1	B1	4.6 ha	No net change since allocation. It is understood that the site is subject to a covenant which is currently a barrier to delivery by the market. Recommend exclusion from effective remaining supply.
London Road (Harlow Innovation Park)	ED1-2	B1	14.2 ha	Delivery of circa 3 ha has taken place on the site <sup>45</sup> . It is understood that 11.2 ha remains for development – circa 7.2 ha under the ownership of Harlow Council, and circa 4 ha under the ownership of Power Rapid.
East Road, Templefields	ED1-3	B1/B2/B8	2.2 ha	Site fully developed – no available land remaining. Excluded from effective remaining supply.
<b>ALLOCATED SUPPLY</b>			<b>21.0 ha</b>	
<b>REMAINING SUPPLY</b>			<b>15.8 ha</b>	
<b>EFFECTIVE REMAINING SUPPLY</b>			<b>11.2 ha</b>	
<b>Epping Forest</b>				
Land adjacent to Dorrington Farm	RUR.E19A	B2/B8	1.0 ha	No net change. 1.0 ha to be included in effective remaining supply.
Dorrington Farm	RUR.E19B	B2/B8	1.0 ha	Approximately 50% of site is occupied by B2/B8 uses, therefore approximately 50% of the site remains for development.

<sup>44</sup> Other employment sites in Harlow including Kao Park, Templefields, East Place, River Way, former GSK site and former Raytheon site are already taken into account within the adjustment for 'on-site' replacement within the demand (requirements) analysis.

<sup>45</sup> Including Nexus. Modus and ARISE which are all completed with café currently under construction.

Site name	Policy ref.	Use allocation	Size	Progress and current status
				0.5 ha to be included in effective remaining supply.
Latton Priory Local Centre (not allocated)	Policy SP4	E	1.0 ha	<p>Included as part of the Latton Priory masterplan under the description of 'local centre' including the following use class typology:</p> <ul style="list-style-type: none"> <li>- Offices</li> <li>- Studio space</li> <li>- Retail</li> </ul> <p>As such, a proportion of the allocation will be developed as alternative employment (E use class) generating uses – as a minimum it is assumed 75% of the site will be delivered as non E(g) uses. Recommend partial exclusion (75%) from effective supply.</p> <p>0.25 ha to be included in effective remaining supply.</p>
<b>ALLOCATED SUPPLY</b>			<b>2.0 ha</b>	
<b>REMAINING ALLOCATED SUPPLY</b>			<b>1.5 ha</b>	
<b>EFFECTIVE REMAINING SUPPLY (INC. UNALLOCATED)</b>			<b>1.75 ha</b>	
<b>East Hertfordshire</b>				
Gilston Area	GA1	B1/B2/B8	5.0 ha	<p>No net change.</p> <p>This allocation is subdivided into two groups, Villages 1–6 and Village 7, based on landowner interests.</p> <p>The Heads of Terms seeks to secure 29,000 sq m within Villages 1–6, with a minimum provision of 'no less than' 10,000 sq m (GEA) to be provided and made available across site for 'commercial uses'.</p> <p>In the Head of Terms, the following alternative employment uses are specified:</p> <ul style="list-style-type: none"> <li>- 2,000–6,000 sq m skills hub</li> <li>- 1,800 sq m commercial early years facilities (300 sq m in each village)</li> <li>- 3,515 sq m health facility</li> </ul>





Site name	Policy ref.	Use allocation	Size	Progress and current status
				<ul style="list-style-type: none"> <li>- 460 sq m youth space/facility</li> <li>- 1,000 sq m community building (Village 1)</li> </ul> <p>These uses therefore account for between 9,050 – 13,325 sq m of the allocation, leaving between 15,675–19,950 sq m for other ‘commercial’ development.</p> <p>Based on the minimum provision (10,000 sq m), the outlined alternative employment uses would account for all (or almost all) of the stated minimum provision.</p> <p>There is a risk that only the minimum provision is delivered, meaning there would be (at best) 950 sq m of provision for other commercial uses such as B2/B8/E(g). There is also a risk that due to the unspecific descriptor ‘commercial’ uses in the Head of Terms, there is no guarantee any remaining provision would be given over to B2/B8/E(g) uses.</p> <p>The Heads of Terms seeks to secure 5,100 sq m within Villages 7, with a minimum provision of ‘no less than’ 1,745 sq m (GEA) to be provided and made available across site for ‘commercial use’.</p> <p>In the Head of Terms, the following alternative employment uses are specified:</p> <ul style="list-style-type: none"> <li>- 275–550 sq m commercial early years facility</li> </ul> <p>Accounting for these uses leaves between 4,550–4,825 sq m for other ‘commercial’ uses under the full provision.</p> <p>Again, there is a risk that only the minimum provision is delivered, meaning there would be (at best) 1,470 sq m of provision for other commercial uses such as B2/B8/E(g). There is also a risk that due to the unspecific descriptor ‘commercial’ uses in the Head of Terms, there is no guarantee any remaining provision would be given over to B2/B8/E(g) uses.</p> <p>A ‘best case’ scenario should also be considered, which excludes the above alternative employment uses from effective remaining supply, and assumes the remaining share of the maximum provision is delivered as B2/B8/E(g) floorspace.</p> <p>A scenario must also be considered whereby the unspecific descriptor ‘commercial’ uses in the Head of Terms for both applications results in zero B2/B8/E(g) floorspace delivery on these sites.</p>

Site name	Policy ref.	Use allocation	Size	Progress and current status
<b>ALLOCATED SUPPLY</b>			<b>5.0 ha</b>	
<b>REMAINING SUPPLY</b>			<b>5.0 ha</b>	
<b>EFFECTIVE REMAINING SUPPLY<sup>46</sup></b>			<b>4.1 ha</b>	<b>(maximum, 0 ha minimum)</b>
<b>TOTAL ALLOCATED HGGT SUPPLY</b>			<b>28.0 ha</b>	<b>~134,000 sq m equivalent</b>
<b>TOTAL REMAINING HGGT SUPPLY</b>			<b>22.3 ha</b>	<b>~112,000 sq m equivalent</b>
<b>TOTAL EFFECTIVE REMAINING HGGT SUPPLY ("BEST CASE")</b>			<b>17.0 ha</b>	<b>~85,000 sq m equivalent</b>
<b>TOTAL EFFECTIVE REMAINING SUPPLY ("WORST CASE")</b>			<b>13.0 ha</b>	<b>~60,000 sq m equivalent</b>

Note: to establish sq m equivalents, the assumed development density for the Gilston allocation (68.2%) has been applied to ha allocations.

<sup>46</sup> Assumed development density is linear across the allocation, therefore alternative employment space has been removed from the allocation on a pro-rata basis.



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