



Nurturing Growth

Version 2– October 2019

An updated discussion paper to support work on a new strategy to drive economic development in the District up to 2025.

Foreword



Welcome to the revised discussion paper 'Nurturing Growth' which is designed to consult residents, local business partners and key stakeholders on how we will work together to develop a strong and resilient local economy.

Our district is already a prosperous and vibrant place to do business. However, in these uncertain times, with the introduction of new digital technologies, changing ways of doing business and new skills and approaches to employment, it's important we have a clear vision of our opportunities and challenges. Not least amongst these is ensuring that our 'place' and our residents continue to be able to compete effectively for jobs, investment and infrastructure that can future proof our economic performance.

The implementation of the District's Local plan to 2033, including the delivery of more than 10,000 new jobs, presents tremendous opportunities for us and we need to position ourselves to best tackle the challenges this involves and achieve the optimum benefit to our local economy.

In the first consultation we had a number of comments from partners and stakeholders which we have tried to incorporate. A key concern however was that partners felt there wasn't enough time to consider and give their views effectively.

As we want this strategy to be one for the whole district, not just the council, we need all those who have a role to play in our economic success to give us their views. Therefore, I've asked for a further consultation, which will run till 16 December, for written responses to be submitted. I've also asked for a special stakeholder conference to be organised where we can also access views in workshops on the key elements of this document.

This is a very important time for our district and I hope you can take the time to attend the conference on 13 November at 9:30am in Theydon Bois Village Hall or if you can't please send your comments in writing (details are on the back page).

Cllr Nigel Bedford

Community and Partnership Services Portfolio Holder

Epping Forest District Council



Introduction

This document has been produced to encourage debate and discussion on how we can best support the development of the local economy.

Our economy is vibrant and diverse, based in a region that is successful and thriving and located between the two international economic powerhouses of London and Cambridge.

This report acknowledges the need to retain and build on our strengths as a successful home for small and medium size enterprises, placing less reliance on the public purse than other areas. Importantly, it also looks at how we might work to future proof our current prosperity and economic success and how that success might translate to the future, given the likely impact of changes that are happening all around us.

The vision, priorities and actions are ideas at the moment, many based on what our partners have told us are important considerations. We want your input and vision to enable us to develop these ideas and initiatives and release the opportunities they represent. This will enable us to focus our efforts in key areas and achieve the best results.



Other Key Plans

This strategy cannot exist in isolation. Other statutory plans and strategies define national, regional and local priorities and the Epping Forest District economic strategy must take these into account. This is especially relevant if we are looking to secure financial support from government and others to help fund our work.

These key plans include the government's new national industrial strategy, our Local Economic Partnership (SELEP) strategy, our neighbouring LEPs in Hertfordshire and London, those of Essex County Council and of greatest significance locally, our own Epping Forest District Local Plan.

Our Local Plan sets out ambitious growth for the district including the delivery of 11,400 new homes and 10,800 new jobs by 2033. It further sets out our role in the creation of Harlow and Gilston Garden Town and policies to maintain and enhance the vibrancy and vitality of our town centres, to support a sustainable transport and road infrastructure network and deliver the necessary infrastructure to support growth including schools, health and community facilities.

A key challenge contained in many of these plans is the need to raise the levels of productivity or GVA of employment in the district. Importantly, this work on our local needs has been carried out in conjunction with councils and other partners responsible for neighbouring areas. This economic strategy will not revisit these decisions, but will look to how we can develop our economy within this wider context, taking account of existing adopted strategies. In many of these documents land use is featured as an important facet of a growing economy. However this isn't the only factor in delivering a strong and robust economy for local people.

Epping Forest District Council is a key partner in the Essex + Hertfordshire Digital Innovation Zone (DIZ), a cross-border, cross-sector partnership that aims to make its geography (including Epping Forest, Harlow, Uttlesford, East Herts & Broxbourne) the best connected place of its type in the UK. The DIZ has published a Digital Innovation Strategy which includes plans to develop its digital infrastructure and digital skills. This economic development strategy will reference that document and adopt a number of its key recommendations.



Draft Economic Vision

We have already had some discussions with key partners and have come up with this overarching vision for the strategy. **Is this the right vision, is it challenging enough or too challenging, is there anything missing?**

“A place where we create prosperity that everyone can share, making the most of our access to London and our location in the London Cambridge corridor.

A place of innovation and ambition recognised for its digital infrastructure and investment.

A place where we:

- **support local entrepreneurs**
- **keep taxes low**
- **invest in our residents’ skills**
- **maximise the potential of existing and new empty floorspace to provide for business startups, grow-on businesses and inward investing companies/or newcomer businesses**
- **... while protecting our green and unique heritage and playing a full role in meeting our carbon reduction targets.”**

Key Priorities

To be effective the council and its partners must target limited resources to bring greatest value to the local economy.

The following seven key priorities are designed to provide long-term guidance to our work. They will be underpinned by three-year delivery plans supported by robust indicators which we will use to measure and report on our performance. **Are these the right priorities for you, are there too many, is anything that will bring greater benefit missing?**

Delivering 21st century infrastructure making this the best place in Essex to do business

Securing further investment from public and private sectors in enhancements to our road, rail, tube, digital networks and employment sites.

Vibrant, diverse and resilient high streets

Maintaining and developing the offer from, and footfall on, our high streets, to meet the challenges of online retailing and the expectations of shoppers and residents.

Exploiting opportunities and developments outside the district

Making sure workers and businesses access jobs, contracts and investment from growth in London, Stansted Airport, Harlow, Cambridge and beyond.

Building partnerships that deliver

Working more closely with investors such as government, Local Enterprise Partnerships, neighbouring councils and research and innovation bodies to coordinate activity and better support cross-border and cross-sector working.

Meeting the skills challenge together

Giving all our residents and local businesses access to first rate education, skills and training opportunities throughout life, to support their ability to access the best jobs, and respond effectively through up-skilling to changing employment opportunities both within and outside the district.

A place for entrepreneurs and businesses to thrive

Finding new spaces and new opportunities and approaches to support business start-ups through intensifying the use of existing industrial, retail and employment land.

Helping rural areas thrive

Developing a new Rural Strategy to ensure our rural communities are sustainable in the long-term and are able to share fully in the district's growth and prosperity.



Where are we now?

Epping Forest District Local Plan: This will shape how the district develops until 2033 with investment from public and private sectors. More details can be found at: www.efdclocalplan.org/

Our local economy is in a good place and has performed well, even through the economic downturn from 2008. We have a wide variety of businesses working across a range of different economic sectors. This spread has made the area less prone to the impact of downturns in any one particular sector, or general contraction as experienced in areas such as the public sector.

A significant number of local people commute out of the district to jobs offering higher income, often in sectors that aren't available locally. These salaries allow residents to afford the relatively high costs of housing, especially in the commuting areas in the south of the district. Figures produced by the South East Local Enterprise Partnership confirm that our district has some of the least affordable housing in the region.

While our local economy is generally strong and performs well against most indicators of performance, its strength is intrinsically linked to the success and growth of surrounding economies - most notably that of London and the London Stansted Cambridge Corridor. This proximity however, also makes the Epping Forest District the ideal new home for those in higher-value jobs being forced to relocate by overheating economies in London and Cambridge where property costs are causing businesses and investors to seek suitable alternative locations for expansion.

Despite the opportunities our district offers, traditional challenges such as the pull of the London economy and the lack of major available sites for economic growth, continue to have a negative impact. These are being joined by new challenges, including the changing face of employment driven by digital technology, which also brings the potential to attract and grow the new knowledge-based roles that are redefining our future.

This strategy is concerned with meeting local people's expectations around future proofing and improving, where possible, the district's economic performance whilst at the same time protecting what we have already built. For example, ensuring policies are in place to enshrine the protection of business accommodation where it is vulnerable to conversion to residential.



Key Aspects of the District Economy

This section takes a more detailed look at some of the sectors and issues that research and discussion with partners and stakeholders has indicated should be specifically addressed in the economic strategy.

High Streets and Town Centres

Our district's retail offer differs from many as, rather than having one main urban area, it is made up of a range of market towns, each bringing its own special charm and character.


Our high street's performance is relatively strong with a good range of shops and services and little by the way of vacancies and empty properties in comparison with other areas of the UK.

Residents enjoy the mix of independent stores outlets and national chains but, as the district does not host any major out-of-town shopping centres, this brings competition from the London retail offer and major shopping centres in Harlow, Chelmsford and the Brookfield Centre, Broxbourne, all of which are within relatively easy reach.

Online retailing and the changing face of high streets are having a very real impact on the ability of our local traders to maintain, let alone grow, their share of our local population's retail expenditure. With many of our most affluent residents drawn to London and the upward pressure on rents, driven by the competition independent retailers face from national chains, our high streets will continue to be an area for attention and support. Increasingly, town centres are looking to diversify the offer with more leisure and more employment space as well as traditional retailing.

There are many steps the council, together with local partners, could take to address these challenges. Some are set out below.

Potential Actions

- 
- Ensure the delivery of the St John's Road area in Epping as a key town centre regeneration scheme
 - Keep business rates as low as possible
 - Retain existing provision for car parking and maintain costs at competitive levels
 - Look at introducing a new annual High Street Fund Competition to boost local action in town centres
 - Actively pursue external investment funds to invest locally
 - Deliver free WI-FI and improved mobile connectivity in all town centres to support footfall
 - Provide greater support to town centre partnerships
 - Provide cycle stations in key town areas

Is this a priority? Are these the right things to do, are there any other steps we should consider to improve things on our High streets?

LANG

6 Simon Campion Court
01992 570555

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Key Aspects of the District Economy

Tourism and Visitor Economy

Our district has an enviable breadth of heritage and natural infrastructure including internationally recognised green spaces and a wide range of activities and attractions. From the Epping Ongar Heritage Railway to the Olympic white-water centre on our doorstep, historic Waltham Abbey to the oldest wooden church in the world. Our mix of things to do, combined with great places to eat, drink and relax, make our towns and villages, and the places in-between, a great destination for visitors and a great place to live. With London on our doorstep and an expanding Stansted Airport to the north, this area has major tourism opportunities.

Businesses have told us this is an economic sector where we can use our green assets to create jobs and income whilst valuing and protecting their future using the income generated and funding sourced, to invest in their future security for the enjoyment of all.

The national tourism economy has outstripped general economic growth levels over recent years. In the district this pattern of growth has been mirrored, and while it is now slowing down in other areas of the country it continues to grow locally at a significant rate. The latest figures show this sector of the Epping Forest District's economy grew by 7% taking the overall value to more than £220 million, increasing local opportunities for employment, particularly in entry level jobs.

Potential Actions

- Work to retain and expand visitor accommodation both in the area or nearby
- Develop greater coordination and joint working with neighbouring councils and key infrastructure providers such as TFL, Stansted Airport and Greater Anglia rail network
- Agree a long-term branding and marketing plan with partners in neighbouring council areas for our tourism offer
- Support rural accommodation in pubs and disused buildings
- Ensure rural broadband connectivity, coverage and speeds
- Conduct a feasibility study into improved connectivity between the Epping Ongar Heritage Railway and visitors arriving at Epping Station
- Ensure surrounding districts link in to our tourism network
- Work with central government to achieve tourism zone designation with neighbouring councils



Is this a priority? Are these the right things to do, are there any other steps we should consider to grow this sector of the local economy?

Key Aspects of the District Economy

Infrastructure and Transport

With the M25, M11, mainline railway and extensive London Underground connections (more than many London boroughs), plus access to Stansted and Heathrow airports, the district is well served for primary travel routes.

However, capacity constraints mean the district itself can become gridlocked, especially if there is a failure on any of these major connections. As this inevitably leads to business disruption, it places more reliance on the use of private transport with the resulting impact on our rural infrastructure and an upsurge in pollution. Crossrail 1 and 2 has the ability to draw traffic away from the current routes and create additional capacity, and four-tracking of the London Liverpool Street line can also provide a range of better travel options for commuters. Given the high and growing number of local commuters, swelled by those from outside accessing the tube in our district, there is real local concern about capacity on existing local links. The need for a robust long-term transport infrastructure investment plan is more central to prosperity in the Epping Forest District than perhaps any other place in the South East.

Epping Forest District Local Plan sets out policies to support a sustainable transport and road infrastructure network and the Plan is accompanied by an Infrastructure Delivery Plan outlining the infrastructure requirements that are necessary to support new development. The District Council however, has limited control over the provision and management of transport connections. It is important for the district that residents can effectively access, and therefore take advantage of, the new growth and employment opportunities at Harlow, Stansted Airport, London and beyond.

In addition to public transport, new cycle networks and walking trails would encourage sustainable travel to work plus benefit visitors from London and beyond to sustainably access local attractions. Travel within the district has been a traditional source of concern, particularly connecting the more rural locations and this has caused access to employment problems, and restricted residents' ability to participate fully in the life of the community. It is therefore no surprise that the district has particularly high levels of car ownership reflecting the only practical solution to this need.

Employment sites can also be considered key elements of the district's infrastructure. We know that there is a strong demand for employment space locally but we also face challenges in increasing and enhancing the existing supply. Within this context, the district is targeted to deliver an extra 10,800 jobs over the Local Plan period to 2033. Whilst not all of these jobs will require employment premises, the Local Plan sets out the allocation of 23 ha of new employment sites and supports the protection and enhancement of existing employment sites. Key to the future growth of the district's economy will be the provision of high-quality office and industrial space to support the high start-up dynamic locally, to provide grow-on space for expanding businesses and to attract new investors.

Potential Actions

- Support Essex County Council to deliver the new M11 Junction 7a at the earliest opportunity and work with partners to deliver improvements on Junction 7
- Work closely with TFL/London Underground to retain investment and increase capacity on the Central line, ensuring district representation on decision making bodies. Also support, with partners the four-tracking option on the London Liverpool Street line
- Support the growth of Stansted Airport and develop new links for local businesses in the supply chain of this growing regional employment hub and greater opportunities for employment of local people
- Expand cycle networks in district
- Work with partners to ensure an integrated sustainable transport corridor for Harlow and Gilston Garden Town is delivered and explore opportunities for a wider integrated transport strategy for the surrounding boroughs and districts
- Lobby government, SELEP and other agencies to support our infrastructure needs
- Promote Epping Forest District as a location for business
- Support the delivery of new employment site allocations to derive the greatest employment dividend and to deliver employment space that is high quality and flexible, responds to demand and supports the grow-on of local businesses as well as offering opportunity for inward investment



- Resist change of use of employment sites and look for opportunities to intensify and strengthen existing employment sites
- Work collaboratively with partners to develop opportunities to access external funding to leverage private sector investment to deliver jobs on existing or potential new employment sites
- Support the Essex + Herts Digital Innovation Zone (DIZ) and the recommendation of its Digital Innovation Strategy to 'leverage local assets to attract investment in digital infrastructure'
- Support the DIZ delivery plan for its Digital Innovation Strategy to maximise the impact and return on investment for Epping Forest District

Is this a priority? Are these the right things to do, are there any other steps we should consider to address these issues?



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Key Aspects of the District Economy

Partnerships That Deliver for Epping Forest District

The district is dependent upon the areas it is connected to for its prosperity, perhaps to a greater extent than many other places, including other locations bordering London. Residents commute out of the district, accessing employment opportunities not available locally (typically securing higher paid London jobs) whilst a smaller number of workers from neighbouring districts and London commute in to fill jobs providing a much-needed impetus to the local economy. Many local services companies also depend on serving London as well as nationally.

Although vital to our economic wellbeing, the district has no direct control over the institutions and organisations that provide the infrastructure and employment or skills and investment, that maintain and enhance our prosperity and wellbeing. The South East Local Enterprise Partnership, central government, colleges and universities and large and small businesses are the dynamo of local growth.

To monitor and influence these organisations and ensure they are contributing effectively to the prosperity of our district, we must have mechanisms to exert influence over their plans and strategies and work in partnership to keep them informed about our area's strengths and opportunities.

Potential Actions

- Establish an Economic Partnership for the District, in collaboration with the private sector, bringing together key businesses, infrastructure providers, local councils and research, skills and teaching bodies, to coordinate and fund initiatives locally
- Work positively with partners to ensure that opportunities for economic growth are realised in the development and delivery of Harlow and Gilston Garden Town
- Work closely with the London Stansted Cambridge Consortium to promote the area as a business investment zone for businesses to the north and south of the district and build employment and supply-chain business opportunities at Stansted Airport.
- Maintain effective representation on the South East Local Enterprise Partnership and develop more effective joint working with the Herts Local Enterprise Partnership
- Establish cross-sector partnerships between East Herts and West Essex to lead, co-ordinate and promote the local economy and continue to play an active role within the Essex + Herts Digital Innovation Zone to maximise the digital dividend for Epping Forest district

Is this a priority? Are these the right things to do, are there any other steps we should consider?

Key Aspects of the District Economy

Skills and Employment

Epping Forest District has a mixed skills base scoring highly for professional skills. It is also home to residents with relatively low skills and has a low level of NEETS (not in employment, education or training).

Those with professional, management or high-end technical skills tend to work out of the district with Westminster and the City of London the top destinations, followed by Tower Hamlets and Camden. These are areas where a wider range of jobs and higher salaries can be more easily accessed. The top point of departure for those working in the district is Harlow followed by Uttlesford. There is a workflow imbalance with a higher number of workers commuting out of the district than coming in. There is an increase in the numbers of people working from home either full time or as part of a flexible work pattern. This is one aspect of the changing face of employment due to digital connectivity. This highlights the growing importance of digital skills that are key to gaining employment in the new digital industries, to utilising the new digital enhancements in existing industries and fundamental to accessing products and services that will increasingly be delivered digitally.

The biggest employment areas in the district are the construction, finance & insurance, digital & creative, care, advanced manufacturing and logistics sectors. Of those, construction is by far the biggest with the most employees and the most individual businesses. It also has one of the highest vacancy levels alongside finance & insurance. However the construction sector is evolving with new models of building emerging which are changing the skills sets required. This evolving skills requirement is a feature of most sectors across the district. The district has a relatively low level of public sector jobs.

The backbone of the local economy is micro and small businesses with the vast majority falling into this category.

Breakdown on the balance of employment in the district (2016 figures) is 20% of those in employment are self-employed. 55.9% are employees.

Of the businesses in the district:

- 92% are micro (0-9 employees)
- 6.6% are small (10 to 49 employees)
- 1.1% are medium (50 to 249 employees)
- 0.2% are large (250+ employees)

Potential Actions

- Support the launch and delivery of forthcoming T Qualifications by building stronger links between education and training providers and local businesses
- Work with local businesses and skills and training providers to ensure the right skills are available in the district at all levels
- Create a skills charter to ensure local stakeholders understand the needs of local businesses and agree to offer opportunities and supportive trading conditions to promote business security and growth
- Work with Public Health England, and Stansted Airport to secure employment opportunities for local people
- Work with the NHS to bridge the gap between skills provision and employment needs
- Work with the Department of Work and Pensions (DWP) to help the economically inactive into work
- Work with developers and future occupiers of new employment sites to maximise employment, skills and training opportunities for local people
- Support the Essex + Herts Digital Innovation Zone (DIZ) and the recommendation of its Digital Innovation Strategy to 'futureproof the local economy by upskilling for the future of jobs'

Is this a priority? Are these the right things to do, are there any other steps we should consider to grow this sector of the local economy?



Key Aspects of the District Economy

A place for Entrepreneurs and Business start ups

Epping Forest District is characterised by micro and small businesses. There is a strong entrepreneurial spirit and these start-ups have an above average success rate in the number getting past the difficult early years of operation. This is a key feature of our economy and one which we want to encourage and support. These small businesses make up the majority of employment across a district that has very few medium and large employers.

For many years the need for start-up space has been met primarily by the market. A range of serviced and supported office/business accommodation has been established locally across the district including modern and innovative centres such as those at Crate Loughton, M25 Business Centre, The Pixel Building and Ongar Business Centre, to service this need.

In other places, where the small business market isn't so strong, these types of developments have required significant public-sector investment to support their establishment. Those in the Epping Forest District are working well but additional capacity to meet demand, and particularly grown-on space, is at a premium as site acquisition often must compete with, and lose out to, residential values or other more traditional usage.

While small businesses are at the core of our economy they often require additional support to grow to their full potential. It is essential that our businesses get access to grants from funding bodies in order to grow.

Potential Actions

- Ensure local small businesses are more able to access major and minor contracts from the public sector
- Implement a Small Business Charter that encourages and commits large firms in the region to give local small businesses a chance to bid for contracts and agree prompt payment to support cash flow
- Ensure planning policy implementation looks at opportunities for serviced small business hubs in the delivery of allocated employment sites, regeneration of designated employment sites where appropriate; or in masterplans for strategic sites
- Ensure the roll-out of superfast broadband and speed improvements respect the needs of small business and clusters
- Work with external partners to ensure local businesses get their fair share of government and other agencies' grant funding and advice and support services
- Ensure local businesses and business start-ups are fully represented on the new District Economic Board
- Resist 'change of use' and look for opportunities to intensify and strengthen existing employment sites

Is this a priority? Are these the right things to do, are there any other steps we should consider to grow this sector of the local economy?



Key Aspects of the District Economy

Supporting our Rural Economies and Communities

The district is over 90% Green Belt and many of our residents live in our rural areas which face their own particular challenges and contain distinct economic opportunities. This does not stop these areas being economically productive. Innovation in our agricultural sectors and our glasshouse industry is continuing to drive up productivity, while tourism is growing with additional bed capacity being put in place in many of our rural pubs and restaurants. These sectors are and will continue to be important job creators. The district has many existing rural employment sites, many of which have developed over time through the diversification of traditional farmsteads and they play a key role in our provision of employment space.

The retention of key infrastructure in rural communities such as pubs and shops remains important as does the continued investment by the council and other partners in delivering superfast digital connectivity. Access to services and employment opportunities remains a significant challenge for those wishing to live or work in the rural areas. The need for an integrated public transport system is very important to creating the right access.

In response to the first consultation it was suggested that in order to give full consideration to the issues, challenges, and opportunities in our rural communities, that a separate rural strategy should be created. This would look in detail at these issues and opportunities and set out clear priorities and objectives that will be part of the economic strategy delivery, with progress reported regularly to the council and other partners.

Potential Actions

- Work with partners to develop and deliver a rural strategy
- Prepare effective and successful bids to government programmes for investment in rural digital connectivity to future proof rural infrastructure
- Deliver tourism initiatives with a real focus on the rural visitor economy growth, ensuring there is a specific set of activities and investments for this
- Where possible work creatively with partners to bring redundant rural buildings back into productive life
- Ensure that the integrated transport strategy has a core focus of effectively serving rural areas with sustainable access and choices
- Deliver all the commitments in this strategy to ensure that the needs of rural economies are reflected and a focus is maintained on the delivery of real outcomes

Is this a priority? Are these the right things to do, are there any other steps we should consider to grow this sector of the local economy?



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Conclusion

The revised strategy is the second stage of our work.

It is based on research we have conducted and work with colleagues from businesses, education etc. to give insight into the local economy and its opportunities and challenges as well as initial feedback from the first consultation. It aims to encourage discussion on the focus for economic work in the district over the longer term and to identify key priorities for action and continued investment, defining what long term economic success should look like. This document will also support the planned stakeholder conference in November.

This is the second opportunity for businesses, residents and other partners and stakeholders to give their views.

Please take some time to give us your views on what's important. If we have missed something that you believe is essential, let us know, if we have suggested something that you don't believe will work. And if you have your own suggestions for things you believe we should be doing to support and grow our economy, this is your opportunity to let us know.

Please email your comments to Duncan Haslam (Economic Development Assistant) at dhaslam@eppingforestdc.gov.uk. If you have any questions about the document or would like a more detailed discussion, please contact John Houston on 01992 564 264.

The last date for comments is 16 December 2019.

Thank you for your interest and support. Your comments will help ensure that we develop the right programmes and plans to nurture economic growth and prosperity in our area.

The content of the strategy and the views of partners will be explored in more detail at a workshop based stakeholder conference on 13 November. This conference will run from 9:00am until 13:00pm and will take place at Theydon Bois Village Hall.

If you would like to attend this stakeholder event please contact Duncan Haslam at dhaslam@eppingforestdc.gov.uk for more details.



