

Thanet District Council

Economic Development in Thanet

(Employment Land Update and Economic Needs

Assessment)

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Introduction

1.1 This document draws together employment evidence and gives reasoning behind the level of growth to be planning for and the economic strategy to achieve this. It also updates the evidence in the Employment Land Review (ELR) that was published in 2010, identifying any areas of change, and reviewing the conclusions.

1.2 There have been a few significant changes since the publication of the ELR. The National Planning Policy Framework was published in March 2012 and there have been some potentially significant changes in local economic circumstances as well as the national and global picture.

1.3 The Council appointed Experian to carry out an assessment of job growth to 2031. The commission involved an assessment of business sectors, % of jobs in the B Use Classes, clusters or networks of knowledge driven creative or high tech industries, the rural economy and barriers and opportunities for growth. This work has helped to inform this document and in the light of the conclusions from the Economic and Employment Assessment 2012 the employment sites from the ELR 2010 have been revisited and reassessed.

Things that have changed since the 2010 ELR

The National Planning Policy Framework (NPPF)

1.4 One of the major changes since the ELR was carried out is the change in policy guidance at the National Level with the introduction of the National Planning Policy Framework.

1.5 The National Planning Policy Framework now requires that Local Planning Authority's

- set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth;
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- support existing business sectors, taking account of whether they are expanding or contracting and, where possible, identify and plan for new or emerging sectors likely to locate in their area. Policies should be flexible enough to accommodate needs not anticipated in the plan and to allow a rapid response to changes in economic circumstances;
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

1.6 The NPPF also has the following requirements in terms of the evidence base, and Local Planning Authorities should assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres;
- the capacity of existing centres to accommodate new town centre development;
- locations of deprivation which may benefit from planned remedial action; and
- the needs of the food production industry and any barriers to investment that planning can resolve.

1.7 The 2010 Employment Land Review took an in depth look at the quantitative and qualitative need for economic floorspace including a review of economic indicators, existing employment space and its quality, the commercial property market of Thanet, a review of business needs and an assessment of employment land requirements.

1.8 The changes in national policy along with changes in the economy since 2010 triggered the need to understand the latest forecasts in job growth, what the growth sectors are for the District and the likely employment floorspace requirements. This document revisits the ELR using this updated evidence along with other relevant information.

1.9 The Council has also had a Town Centre Retail, Leisure, Tourism and Culture Assessment carried out by Nathaniel Lichfield and Partners to understand the needs of the non B use class uses. The assessment carried out a completely new household telephone survey as well as in street surveys. In addition to purely retail uses the survey assesses leisure, tourism uses and looks at the role and function of the town centres, which further satisfies the requirements of the NPPF. The assessment was updated in 2016 and 2017 to incorporate changing housing forecasts.

1.10 The National Planning Policy Framework also requires Local Planning Authorities to specifically consider the needs of the rural economy, home working and the communications infrastructure.

Rural Economy

1.11 The NPPF says that planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development. To promote a strong rural economy, local and neighbourhood plans should:

- support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well designed new buildings;

- promote the development and diversification of agricultural and other land-based rural businesses;
- support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors, and which respect the character of the countryside. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres; and
- promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship.

1.12 In the same year as the NPPF was published the Government (Defra) released the rural statement in September 2012. The Statement is based around three key priorities; Economic Growth and ensuring rural businesses make a sustainable contribution to national growth; Rural Engagement; and quality of life to ensure that rural people to have fair access to public services and to be actively engaged in shaping the places in which they live. This document is mainly aimed at remote rural communities of the UK and as recognised in the ELR 2010 Defra themselves categorise Thanet as “Other Urban” in the rural/urban land classification they use for policy making.

1.13 The Rural area in Thanet is very close to the urban area and centres of economic activity and these are highly accessible in comparison with other districts. They are not isolated settlements of economic inactivity as elsewhere in the country, particularly the 5 priority areas identified in the rural statement.

1.14 In Thanet there are two types of rural economic activity. One is economic activity that occurs in rural areas but is not dependent on the rural area for the economic activity and the other is economic activity that is dependent on the rural area for the economic activity such as agricultural and equestrian businesses. Due to the geography of Thanet both co exist successfully.

1.15 The ELR stated that the number of VAT registered enterprises within the rural area was less than 10% and this is still the most up date data, however a more detailed breakdown of these figures shows that 10% of the rural businesses in Thanet employ 20 persons or more compared with 5% in both the South East and England. The ELR also noted that much of Thanet’s employment space is located in the rural area on sites such as Laundry Road and Hedgend Industrial Estates and it is important that these sites remain.

1.16 Village audits carried out by the Parish Councils suggest that there is a fairly even spread of businesses across the villages. Many service industry businesses exist to serve the local population and sit alongside large farming businesses and businesses that support the land based economy such as agricultural repair companies.

1.17 The Council has traditionally supported sustainable rural economic development through planning policy and permission has been granted for businesses in the rural area in the past. The NPPF also requires Local Planning Authorities to support the needs of the food production industry. The Council considers how to support the rural economy, rural communities in terms of service provision and quality of life and the needs of the food production industry in Part D of the Employment Topic Paper.

Working from home

1.18 The rising trend of live/work is an important consideration for the rural economy as well as the wider economy. It is a sustainable method of working and can be encouraged as a way to strengthen the rural economy. With the increasing level of home working and technical innovations in food production and farming it is vital that telecommunications infrastructure in the rural area is supported.

1.19 The publication Understanding Kent's Home Based Business sector shows that home based working is a growing trend and that nationally 63% of home based businesses were in the service sectors. As the service sector dominates Thanet's economy it is reasonable to assume that live/work is a growth opportunity for Thanet's economy and should be supported. Fundamental to the success of home based working is adequate communications infrastructure such as broadband.

1.20 Overall findings of the report include that most businesses in the UK are started from home, homeworking is more prevalent in rural areas than urban and that home is the main business or work premises for 41% of small to medium sized enterprises. Supporting home working can be a way of supporting Thanet's rural economy and new businesses which would support the aims of the national planning policy framework and Thanet's overall economy.

1.21 The report also concludes that workhubs should be used as a "tool" to grow the home based economy. Workhubs act as flexible office space with professional equipment and meeting space that can be hired and used in an ad hoc manner by home based workers. The Council has traditionally supported the growing trend of home working through planning policy and work hubs could be located in an accessible central location in the District.

Communications Infrastructure

1.22 The National Planning Policy Framework says that advanced, high quality communications infrastructure is essential for sustainable economic growth. The development of high speed broadband technology and other communications networks also plays a vital role in enhancing the provision of local community facilities and services.

1.23 In preparing Local Plans, local planning authorities are required to support the expansion of electronic communications networks, including telecommunications and high speed broadband. They should aim to keep the numbers of radio and telecommunications masts and the sites for such installations to a minimum consistent with the efficient operation of the network. Existing masts, buildings and other structures should be used, unless the need for a new site has been justified. Where new sites are required, equipment should be sympathetically designed and camouflaged where appropriate.

1.24 The NPPF also contains detail on determining planning applications for telecommunications.

1.25 Kent County Council has been campaigning for super fast broadband across Kent. Over the past 20 years Kent has seen a massive increase in growth, and to attract more business and economic growth to our communities we need to equip the county with a strong digital structure. Broadband is essential for regeneration, and therefore making

Kent the destination of business choice for the future is key. The aim of KCC's work is to attract business to smaller areas, benefitting communities in terms of regeneration and the economy. Kent County Council (KCC) is working with the Government's broadband agency Broadband Delivery UK (BDUK). The Making Kent Quicker programme covers a range of projects that KCC is leading to improve broadband infrastructure

1.26 The Employment Topic Paper considers how communications infrastructure and home working might be supported.

1.27 One of the provisions of the NPPF is to identify the Functional Economic Area to reflect the market geography within which the local economy sits. This has been addressed later on in the Floorspace Requirements section of the report.

Changes in the Economy

Recession

1.28 The macro economic situation of the country has had an affect on employment growth in Thanet. In 2008 the UK economy went into recession. Gross domestic product fell by 1.5% in the last three months of 2008 after a 0.6% drop in the previous quarter which meant two consecutive quarters of negative economic growth – the definition of recession. The figures, from the Office for National Statistics (ONS), showed that manufacturing made the largest contribution to the slowdown, contracting by 4.6%. With the exception of agriculture, all elements of the economy shrank in the first year of recession.

1.29 Low wage growth and low consumer spend means that UK growth is expected to be 1.4% in 2018 (PWC 2018)

Public Sector Cuts

1.30 The political priority is to cut this fiscal deficit and the Government has responded to the situation with a series of austerity measures, which include public sector cuts including jobs. Thanet and East Kent relies heavily on the public sector. Thanet has the 2nd highest level of public sector dependence in the South East with 14,200 people or 35.3% of the total workforce. Thanet has a high proportion of public sector employees with 22.7% of total employment within the public sector. There is expected to be a gradual reduction in public sector employment as a result of budget constraints.

1.31 A report by Kent County Council into public sector dependency models 3 scenarios, a 5%, 10% and 15% cut in public sector jobs. The report concludes that there could be between a 1 and 5% reduction in employment growth between 2010 and 2025. Public sector job losses may mean a very different unemployment demographic. Public sector workers tend to be older, relatively highly qualified and the majority are women. This is different to the current unemployment trend of young workers just entering the job market. Public sector job losses and cuts in expenditure also impacts upon the private sector, particularly service providers.

1.32 The goal and challenge is clearly to grow the private sector. Between 2000 and 2008 Thanet's private sector jobs grew by 14% which is a positive direction of travel. The report suggests that in order to build on this Kent should take advantage of growing sectors such as the low carbon and environmental goods sector and the creative industries sector. The introduction of the High Speed One Domestic Rail Service could

encourage the “London Effect” It suggests to take advantage of this potential growth that Kent should position itself in terms of relevant skills base and supporting business investment.

Closure of Pfizer Sandwich Campus

1.33 In February 2011 Pfizer announced that it was closing its Sandwich campus which employed approximately 2,400 people. The phased closure happened over a year and some staff have been retained. Indirect job losses such as those of security and delivery staff made the total even higher.

1.34 A report by DTZ in 2011 estimated that 9,900 FTE jobs could be lost in Kent or 6,100 in East Kent if all jobs on the Pfizer Sandwich campus are lost. It concluded that if 25% of current employees secure employment through other new employers on site, or in the East Kent area, the estimated job losses would be 7,400 FTE jobs in Kent and 4,500 in East Kent. Employment impacts appear most significant in Dover district where the Pfizer campus is located; however as a significant proportion of employees live in surrounding districts, the direct residence based impacts would be spread more evenly between districts. It is understood that around a third that of Pfizer employees came from Thanet.

1.35 Total combined job losses in East Kent were estimated to reach 7,800 in 2011, based on the loss of all jobs at the Pfizer Sandwich Campus, the closure of Dungeness A power station, the start of decommissioning on Dungeness A, and the first year of public sector cuts (25% of total reductions). Combined job losses in East Kent are estimated to increase to 12,200 by 2018, based on the loss of all jobs at the Pfizer Sandwich Campus, the closure of Dungeness A and B power station, the decommissioning of both power stations, and the full amount of public sector cuts. This may be a pessimistic assumption given measures that are being put in place to address this.

1.36 The report concluded that if 25% of current Pfizer employees secure employment through other new employers on site, or in the East Kent area, then employment growth would be expected to return to East Kent in 2014 and employment levels of 2009 attained in 2017. However, it should be noted that employment growth in the retail and hotel sectors will not necessarily provide equivalent employment opportunities for the highly skilled that remain unemployed following the closures of Pfizer and Dungeness and average salaries in these sectors are also likely to be lower than those achieved at Pfizer and Dungeness.

1.37 It is unclear from latest statistics whether these impacts have occurred especially as not all of Pfizers workforce lost their jobs. There have also been a number of positive interventions that will have benefitted and have future benefits for Thanet’s economy.

Discovery Park

1.38 The former Pfizer campus is under new ownership and the Government has designated Discovery Park at Sandwich, Kent an Enterprise Zone. This is a major opportunity for the workforce and supply chain businesses in Thanet and offers the potential for East Kent to maintain its position as a leader in life science and pharmaceutical production. Discovery Park Enterprise Zone covers 99.4 hectares on the

Pfizer site at Sandwich and was sold to a private consortium, Discovery Park Ltd, in August 2012.

1.39 The package of incentives on offer for businesses locating at the Enterprise Zone are attractive and include:

Business rate discounts:

The available discount is a maximum of £55,000 per year, for up to five years (i.e. a maximum discount of £275,000 over a five year period). There is no limit on the percentage discount, so a business paying rates of less than £55,000 per year could receive a discount of 100%, subject to European state aid rules which will not apply to most businesses.

Planning simplification:

The Enterprise Zone has a simplified planning regime. To achieve this, Dover District Council has developed a Local Development Order (LDO) in partnership with businesses in the Enterprise zone, Kent County Council, the Environment Agency, English Heritage, Natural England, Locate in Kent, Business Link, Sandwich Town Council and Thanet District Council. The LDO enables the conversion of existing buildings, the development of new buildings and changes of use, without the need for individual planning permissions, provided that it is within the scope of the Order.

Superfast broadband:

The Government's Enterprise Zone prospectus offers support to ensure that superfast broadband is available throughout the Zone, by guaranteeing the most supportive regulatory environment and if necessary public funding. Discovery Park already has good broadband access and it is not yet known what additional Government support will be required or available.

1.40 Thanet District Council has worked closely with Dover District Council on strategic projects along the Richborough corridor including developing a masterplan for Discovery Park which now includes 500 homes and a combined heat and power plant. Discovery Park is proving a success and leading the way in Enterprise zones. 650 Pfizer jobs remained on site and with new companies on site now employ around 2,400 people.

Thanet's Accessibility

Kent International Airport

1.41 Kent International Airport lies 2 km west of Ramsgate on a chalk plateau in the central part of the Isle of Thanet, North East Kent. It is approximately 110km east of London. The airport is 1.5 kilometres from the dual carriageways (A299 then M2) which provide fast road links to the M25 and London. Drive time to London is approximately 1 to 1.15 hrs. The airport is within half an hour drive of Dover and both Dover and Ramsgate ports have access to Europe. The airport was formerly an RAF base and became a passenger terminal in 1964-65.

1.42 The former owners of the airport, Infratil, produced a Masterplan in 2009 which estimated passenger and freight numbers for the airport to 2033 along with details of

future airport expansion and these projections are detailed in the ELR 2010. Estimates for growth proposed in that Masterplan have not happened.

1.43 Following the sale of the airport by Infratil in 2013 and its closure by new owners Lothian Shelf in May 2014 the Council has made significant efforts to explore its CPO powers to support a functioning aviation use in the site. The table below details the work of the Council in trying to secure this.

- July 2014 - Cabinet resolved to carry out a soft-market testing exercise to identify a CPO Indemnity Partner – a third party who could cover the costs of compulsory purchase of the Manston Airport site.
- December 2014 – Cabinet decided that no further action be taken at the present time on a CPO of Manston Airport, on the basis that the Council has not identified any suitable expressions of interest that fulfil the requirements of the Council for a CPO indemnity partner and that it does not have the financial resources to pursue a CPO in its own right.
- May 2015 - Extraordinary Council meeting agreed that to recommend to Cabinet that it reviews its position in relation to the Manston Airport site, taking account of all the surrounding circumstances relating to an indemnity partner for a possible Compulsory Purchase Order.
- July 2015 – Cabinet decides to authorise specialist advice to determine whether RiverOak are a suitable indemnity partner in relation to a CPO for Manston Airport.
- October 2016 - Cabinet decides to take no further action at the present time on a CPO of Manston Airport, on the basis that RiverOak do not fulfil the requirements of the Council for an indemnity partner
- December 2015 - Cabinet decides to undertake a further soft market testing exercise to identify any interest in becoming a CPO indemnity partner in relation to Manston airport
- June 2016 - Cabinet considered the assessment of the responses to the exercise and agreed that in terms of the key lines of enquiry, the market cannot deliver on the council's requirements; there is no established market which is able to deliver, or an adequate number of operators; the market has no capacity to deliver the requirements and there is no cost or other benefits in taking this matter further.

1.44 Following this the Council sought to understand whether an airport would be a viable operation for the site and whether there would be a reasonable prospect of that occurring within the plan period of the Local Plan (i.e. to 2031) so that it could fully consider the options for the site. The Council also needed robust evidence to inform the Local Plan. Accordingly the Council appointed Avia Solutions to carry out the study.

1.45 The Avia Solutions Report September 2016 concluded that it is most unlikely that Manston Airport would represent a viable investment opportunity even in the longer term (post 2040), and certainly not during the period of the Local Plan to 2031.

The owners of the airport site submitted a planning application in April 2016 for a mixed use development comprising 2,500 dwellings, 85,000sqm of employment floorspace, a 3,100sqm of retail floorspace, a 120 bedroom hotel and two primary schools known as Stone Hill Park.

1.46 RiverOak Strategic Partners are in the process of submitting a Development Consent Order (DCO) to the Secretary of State to acquire the site for aviation use as a Nationally Significant Infrastructure Project (NSIP). The proposal is to reopen Manston as a hub for international air freight which also offers passenger, executive travel and aircraft engineering services.

1.47 At the time of writing the application remains undecided and the DCO is yet to be accepted by the Planning Inspectorate.

High Speed Rail

1.48 Domestic services on the high speed Channel Tunnel link line began in December 2009, operated under a UK franchise agreement by Southeastern railway.

1.49 Since the service began, commuters from Kent using the service have been able to benefit from significant time savings. For example, commuting from Ashford to central London used to take 84 minutes and now takes just 37 minutes on the High Speed service. Journey times to London from Thanet are currently 76 minutes.

1.50 This has had potentially significant positive effects on Thanet's economy and perception. A report was published in January 2009 "Economic Impact of High Speed 1" carried out by Colin Buchanan for London and Continental Railways that assessed some of the effects.

1.51 Some broad conclusions were that the scheme brings about improvements to journey times between London and destinations in Kent as well as Paris and Brussels and also has significant regeneration impacts.

1.52 The report said the four main benefits of the scheme were:

- A financial impact (increase in rail revenues)
- Conventional transport benefits (e.g. journey time savings)
- Wider economic benefits (enabling workers to move to more productive jobs by increasing peak capacity to central London, and increasing the effective density of London and locations in Kent by reducing the generalised costs of travel)
- Regeneration (helping to deliver the regional growth strategy and thus providing the land that allows new investment)

1.53 With regards to regeneration, impacts of the scheme include:

- The value of the housing stock in the study area may increase by around £1.3bn, representing a capitalised value of HS1 benefits to current residents;

- Earnings per annum across the study area may increase by between £62m and £360m due to the commuting facilitated by HS1.

1.54 A later report prepared by the Local Strategic Partnership in March 2011 called “High Speed 1 Impact Analysis Year One Study” looks at satisfaction levels with the service and public perception. The report shows that there is a high level of satisfaction with users of the service but when looking at its impact on economic growth respondents to a survey were not aware that the High Speed services extended to east Kent suggesting that better marketing for the area is needed.

1.55 Some potential knock on benefits of the High Speed 1 scheme for Thanet include a high speed rail extension to Thanet and a potential new station.

High Speed Rail Extension to Thanet

1.56 KCC is working with Network Rail to investigate ways in which journey times on the existing Ashford to Ramsgate line could be reduced. A preliminary study found that there is the potential to reduce current journey times by up to 10 minutes. Thanet District Council continue to campaign for this line upgrade. Funding is in place for line improvements between Ashford and Canterbury and Canterbury and Ramsgate.

Thanet Parkway

1.57 Kent County Council’s Local Transport Plan “Growth without Gridlock” includes proposals for a new station on the High Speed 1 line.

1.58 KCC has been promoting the building of a new parkway station in Thanet on the existing rail line between Minster and Ramsgate since 2010. Long commuting times to London are often seen as a barrier for new business investment in the area. Thanet Parkway railway station will complement high speed rail, bringing Thanet to within about an hour’s journey time of London, thereby improving the perception of East Kent as a place for investment, particularly at Discovery Park Enterprise Zone, the former Manston Airport site and other development sites proposed in the draft Thanet Local Plan. The improved rail connectivity to London and across the County will allow local residents to access a wide range of job opportunities.

1.59 The proposed location of the Parkway Station is on the Ashford International to Ramsgate line, south of the former Manston Airport site and just to the west of the village of Cliffsend. It will be sited between Minster and Ramsgate railway stations, and will be served by both Mainline and High Speed trains. See map below:

1.60 The proposed parkway station will widen employment opportunities for Thanet residents by providing improved rail access to London and other locations in the county. Thanet Parkway will encourage growth in Thanet and East Kent, and will also cope with the growth in rail usage from existing and future communities.

1.61 It was proposed the station will be part funded by the Local Growth Fund (LGF) through the South East Local Enterprise Partnership (SELEP) along with a contribution from KCC. An application has been made to Network Rail and the Department for Transport’s New Stations Fund for the remaining funding,

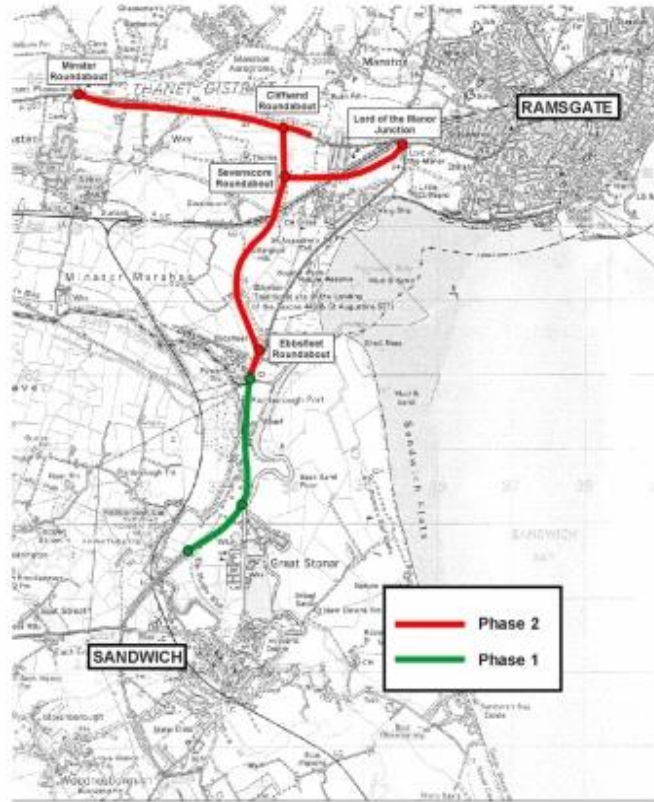


1.62 KCC are currently preparing a business case for a new station and are considering capacity at the existing stations. These improvements to rail infrastructure in Thanet are potentially very positive for Thanet's economy and options for their development are discussed in the Employment Topic Paper.

East Kent Access

1.63 East Kent Access, a phased road improvement scheme for the Thanet and Dover Districts, opened in May 2012. The overall project cost £87 million funded by the Department of Transport with £5.75 million coming from Kent County council. Phase 1 of the scheme was designed to improve accessibility and safety. The scheme was designed to help the economy of East Kent and connect the ports of Dover and Ramsgate and Kent International Airport. Phase 2 was an improvement to dual carriageway standard and crosses roads and railway lines. The map below shows the route.

East Kent Access Phase 2



1.64 The local transport plan for Kent 2006-2011 states that the purpose of the East Kent Access scheme derives directly from the principal objectives of the first Local Transport Plan, namely to:

- stimulate economic activity and employment;
- integrate transport planning with the wider spatial planning of the area;
- improve safety and security in the transport system;
- influence and manage the demand for the type of transport used
- widen the choice of transport available to the area

1.65 The Local Transport Plan stated that Phase 1 alone would generate some 450 jobs, whilst Phases 1 and 2 together would generate some 8,000 jobs by 2016 and that the scheme is therefore a central and indispensable part of the regeneration of East Kent and its coastal towns and the re-balancing of the south east's economy. With the closure of Pfizer and the recessions these predictions may not be accurate but the road infrastructure improvements will benefit the development of Discovery Park and Thanet residents. Other benefits of Phase 2 were stated as:

- To provide more efficient and rapid access from Sandwich and the Sandwich corridor to the major labour source in the Thanet towns.
- To provide more efficient access from the employment hub at Sandwich, westward to the A299 and the principal motorway route to domestic markets.

- To complete the high grade access of the Sandwich Corridor between the A2 at Dover and the A299/A253 Thanet Way and thereby capitalise on the provision of a wider and more mobile labour market in East Kent.
- To increase the mutual advantages of linking Kent International Airport to the Port of Dover, as an international port and cruise terminal.
- To improve the general accessibility of the former Kent coalfield sites.
- To provide for flexibility in the management and control of international freight between the Channel, and Ports of Dover and Ramsgate at times of disruption to the M2 and M20 corridors or French, Belgian and Dutch ports.
- To ensure good South Coast connections, avoiding Canterbury, between the regional airport at Manston and South Kent and Sussex.

Ramsgate Port

1.66 In 2000 the Royal Harbour Approach Road was built to improve access to the Port and service the then thriving ferry industry operating in and out of Ramsgate. The port has excellent ro ro facilities and excellent road connectivity although unfortunately TransEuropa ferries ceased operating from the port leaving Ramsgate with no ferry operator. The Port currently services 2678.4 MW of Wind Energy and with further planned increase in the UK's offshore energy capacity there is potential to grow the port's renewable energy support facilities and increase geographic reach. The current Port Masterplan produced aspires to re introduce a roll on roll off passenger service to the port, support growth in commercial use of the port and support the tourism and leisure industry that surround the neighbouring Royal harbour and its key priorities are:

- Protecting and growing existing relationships with users of the port and harbour in order to assure service standards and secure future income streams;
- Implementing a Ro-Ro strategy described in this plan to restore the commercial port's market position and recover recent lost revenue;
- Making improvements to the Royal Harbour Marina (new marina management system, increasing visitor footfall and dredging) to significantly enhance the user experience and attract more visitors;
- Keep the re-launched website fresh to support the commercial port an Royal Harbour Marina in order to raise substantially their market profiles.

Cultural and Leisure Development

1.67 The Turner Contemporary gallery on Margate seafront opened in 2011. The project was part funded by Kent County Council, Thanet District Council and the South East England Development Agency and its purpose to trigger economic regeneration in the town.

1.68 A report into the economic impact of Turner after its first year was published in April 2012. The gallery received 495,000 visitors in the first year. The report concludes that

the total economic benefit for 2011/2012 is £13.9 million and a total of 130 full time equivalent created jobs during its first year.

Number of visits	495,000
Gross effects (£)	
Visitor-related expenditure	5.4 million
Gallery expenditure on goods and services	0.9 million
Other gallery expenditure	0.7 million
	7.0 million
Net additional effects (£)	
Visitor-related expenditure	4.5 million
Gallery expenditure on goods and services	0.6 million
Other gallery expenditure	1.1 million
	6.3 million
Destination profile benefits (£)	
Press coverage	6.0 million
Broadcast media	0.7 million
	7.6 million
Total economic impact 2011/2012 (£)	13.9 million
(Net additional effects plus destination profile benefits)	
Direct employment (within the Gallery) (FTEs)	49
Indirect employment support by the Net Additional Effects (FTEs)	81
TOTAL	130

1.69 The report clearly shows that the Turner Contemporary has had a very successful first year. The success has continued and in August 2013 the gallery welcomed its one millionth visitor and it is evident that there have been knock on effects in Margate's Old Town with numbers of galleries, shops, cafes and restaurants opening recently. Between November 2012 and March 2013 there was a 59% increase in contacts to the Visitor Information Centre compared to the same winter period before the Turner Contemporary opened.

1.70 Dreamland also reopened in 2015 following a multi million pound revamp and created considerable interest in Thanet. In 2012 The Dreamland Trust appointed multi-disciplinary designer, Wayne Hemingway MBE and the HemingwayDesign team to bring forward the branding and design scheme for Dreamland.

1.71 In September 2013 Dreamland transferred into the council's ownership securing the future for Dreamland. After a long restoration project, Dreamland opened its doors to the public in June 2015. Work was carried out on the Scenic Railway, along with an Historic Rides Collection, internal spaces, archiving, learning and engagement programmes. The attraction saw bumper visitor numbers of 50,000 during the May bank holiday in 2017. Further phases of development are ongoing.

1.72 A report into the Economic Impact of Tourism by Visit Kent in November 2016 found that £293 million spent in the local area as result of tourism, taking into account multiplier effects. This is an increase of over 19% compared to 2013. This demonstrates how important tourism is to the public sector.

Growth and Funding Initiatives

Public Sector Finance

1.73 Public sector finance has been made available by Kent County Council to support new jobs and business growth which will help the private sector base in east Kent.

1.74 “Expansion east Kent” had funding of £35 million available from the Regional Growth Fund. They are offering 0% loans for businesses wishing to start up or expand in east Kent. The programme aims to unlock private sector finance, stimulating over £300million in associated investment over the course of the next three years and creating a major boost for the East Kent economy. Kent County Council, with the support of the Sandwich Task Force and the East Kent Districts, was successful in applying to the Government’s Regional Growth Fund (RGF). Over £30 million was taken up.

1.75 Work is ongoing under the Kent and Medway Business Fund offering 0% loans to small and medium sized businesses across Kent and Medway funded by loan repayments from previous Regional Growth Fund Schemes (Expansion East Kent, Tiger and Escalate).

Thanet’s Economic Growth Strategy

1.76 Thanet District Council’s Economic Growth Strategy was published in November 2016 and it identified key transformational initiatives to focus on to deliver employment growth. These are:

- Developing the Port at Ramsgate
- Investing in high value manufacturing and engineering across Thanet and east Kent
- Position Thanet as a global agritech hub
- Promoting Thanet’s broader cultural/leisure offer
- Cultivating the creative industries across Thanet
- Designing enterprise into new communities
- Long term feasibility modelling for Margate and Ramsgate

East Kent Growth Framework Report December 2017

1.77 The East Kent growth Framework (EKGF) has been prepared by the East Kent Regeneration Board (EKRB) to set out an overarching strategy and investment priorities for achieving long-term sustainable growth across East Kent between 2017 and 2027. The EKRb comprises the five East Kent authorities and Kent County Council.

1.78 Several projects were identified in Thanet:

- Port of Ramsgate
- Thanet Parkway Station
- Inner Circuit Improvement Strategy
- *Westwood Relief Strategy*
- Margate Junction Improvements
- Advanced Manufacturing Park (Margate Business Park)
- Creative Industries Workspace
- Feasibility Modelling for Ramsgate, Margate and Viking Bay
- *Ramsgate Heritage Action Zone*
- *Theatre Royal*
- *Dreamland and Sunshine Café Redevelopment*
- *Viking Bay*
- Eurokent Business Park
- Agri-tech Hub
- East Kent College Broadstairs Campus extension

(*italics* represent subsidiary projects which are linked to or required in order to deliver the heading project)

1.79 Spatial priorities for Thanet are Port of Ramsgate, Thanet Parkway Station and Inner Route Improvements, Advanced Manufacturing Park at Manston Business Park, Creative Industries workspace and developing out Eurokent Business Park.

Key Findings:

- Thanet has a high dependency on the public sector for employment.
- The closure of the Sandwich Campus of Pfizer was a set back for the local economy although measures to mitigate this have been successful.
- Infrastructure improvements such as the introduction of High Speed One and the opening of East Kent Access have significantly improved access to Thanet and are very positive for the economy
- The Turner Contemporary Gallery, Dreamland and other attractions are having a very positive economic effect
- Following the closure of Pfizer public sector finance has been made available to assist businesses wishing to start up in Thanet
- The Council's Economic Strategy and the East Kent Growth Framework have identified similar economic aims and objectives for the District that strategic partners will deliver

Socio economics, existing employees and space and additional economic considerations

2.1 The 2010 Employment Land Review concluded that Thanet suffers from severe socio economic problems and this is still the case.

2.2 In November 2017 the proportion of working age population claiming Job Seekers Allowance in Thanet was 2.4% compared to 0.7% in Kent and 1.1% in the South East. Unemployment is still significantly above Kent and the South East. The claimant rate peaked at 6.4% in February 2012 which is almost double the UK average. The figure was 5.6% in July 2013 which demonstrates an improvement.

2.3 The claimant count for Thanet in November 2017 was 3.8%. The South East average for all age groups is 1.2% and for Great Britain it is 1.9%. This shows Thanet has a significantly higher claimant count than the south east and national averages.

2.4 The employment rate is a measure of the proportion of the population of working age who are actually in work. It is reduced by the number of those of working age who are students but not also employed; those people who are unemployed; and the number of people of working age who are economically inactive. The rate for Thanet in 2009 was 63.5% but increased in 2016 to 75%.

2.5 The average earnings of those **living** in Thanet in 2009 was £426 per week. This compares to £520 per week for residents of Kent as a whole, and £537 per week for those living in the South East of England. In 2012 the average weekly earnings of those living in Thanet fell to £412.5 and rose to £478.6 in 2017. Resident earnings of those living in Kent and the South East of England are boosted by the significant numbers of residents who work in London where they command higher salaries than they would were they to work where they live.

2.6 The average earnings of those **working** in Thanet in 2009 was £383 per week. This compares to £479 per week for those working in Kent as a whole, and £514 per week for those working in the South East of England. In 2012 the average weekly earnings of those working in Thanet rose to £392 and again to £424.5 in 2017. The low workplace earnings of those working in Thanet reflect the relative low value added economic activities located in the district and the level of part time work although the figures show that this is improving.

2.7 The Index of Multiple Deprivation captures many of the above indicators and a range of additional indicators to give a relative ranking on the level of disadvantage of the authority. Thanet is the most disadvantaged District in Kent as measured by the IMD and within the top 10% of the most deprived authorities nationally. Thanet's overall ranking in the Index of Multiple Deprivation is attributable in large measure to the intense deprivation to be found in five wards within the District; the wards of Central Margate and Cliftonville West in Margate, and the wards of Newington, Northwood and Eastcliff in Ramsgate.

2.8 Educational attainment in Thanet has significantly improved since 2009 across all level with the amount of students achieving NVQ1 to 4 or equivalents and other

qualifications rising by approximately 10%. This could in part be due to school leaving age being increased to age 17 in 2013 and age 18 in 2015.

2.9 GVA per head is a broad measure of the wealth of an area. Thanet's GVA per head in 2009 was £14,788. In 2012 GVA per head increased to £14,876 and again to £15,021 in 2015. The UK average GVA in 2015 was £25,351. A significant factor in Thanet's low GVA per head is the large numbers of retired people living in the area but also below average productivity.

2.10 One reason why GVA varies between areas is because they can have very different numbers of people in work relative to the population as a whole. In Thanet there are 310 people in work for every 1,000 people living in the area, compared to 390 in Kent and 450 in the South East. The low proportion of people in work per 1000 population in Thanet reflects the relatively large proportion of the population that is over retirement age, (13%), compared to 11% in Kent, and 10% in South East England and this is expected to increase.

2.11 The number of employee jobs from 2008 is 40,200 and fell to 38,621 in 2012 and increasing again to 41,000 in 2016. The breakdown of jobs per sector is as follows:

Table 2 – Employment in Thanet 2016

	Employees	%	Kent %	England %
Agriculture, forestry and fishing	-	0	0.1	0.7
Mining and quarrying	-	0	0	0.2
Manufacturing	3,300	7.9	6.6	8.1
Electricity, gas, steam, air conditioning supply	100	0.3	0.3	0.4
Water supply; sewerage, waste management and remediation activities	200	0.5	0.8	0.7
Construction	2,100	5.2	6.3	4.6
Wholesale and retail trade; repair of motor vehicles and motorcycles	7,500	18.3	17.7	15.2
Transportation and storage	1,900	4.6	6.4	4.8
Accommodation and food service activities	3,800	9.1	6.8	7.4
Information and communication	700	1.7	2.9	4.2
Financial and insurance activities	800	2.0	2.7	3.5
Real estate activities	700	1.7	1.9	1.6
Professional, scientific and technical activities	1,600	4.0	6.5	8.6
Administrative and support service	2,400	5.8	9.9	8.9

activities				
Public administration and defence; compulsory social security	1,100	2.7	3.8	4.3
Education	5,500	13.4	10.2	8.9
Human health and social work activities	8,000	19.5	13.0	13.2
Arts, entertainment and recreation	1,100	2.7	2.3	2.5
Other service activities	700	1.7	2.1	2.0
TOTAL				

(Source: 2016 BRES, KCC Business Intelligence, Research Evaluation) (figures are rounded)

2.12 This shows that strong sectors in the Thanet economy are retail, accommodation & food services, education and health

2.13 Evidence from the Economic and Employment Assessment 2012 (EEA) shows that the green and tourism sectors comprise a greater proportion of total employment than they do in South East and England and have been growing faster.

The Green Sector

2.14 The green sector in Thanet has experienced growth above the regional and England levels over the last two years demonstrating growth potential within this sector. When the primary and secondary green sector are combined this amounts to more than 10% of total employment in Thanet.

The Tourism Sector

2.15 Similarly the tourism sector within Thanet has enjoyed stronger growth over the last two years than the region or England. The tourism sector in Thanet accounts for 9% of total employment compared to just over 8% for the region and England. Over the last two years the sector has grown by over 2% year on year compared to declines in the region and for England. Since the EEA was published KCC looked at BRES industrial categories and found that tourism now (2016 figures) accounts for 13.4% of Thanet's economy. (KCC Business Intelligence, Research Evaluation)

2.16 The Economic and Employment Assessment 2012 states that whilst there has been a decline in manufacturing in line with trends seen across the UK there are elements that have been performing better, namely high tech manufacturing within which the Thanet and the UK as a whole retains a competitive advantage.

2.17 Thanet's Economic Growth Strategy 2016 seeks to encourage creative industries in Thanet. This currently accounts for 1.8% of Thanet's economy. According to "Thanet's New Wave – The creative force regenerating out towns" published in March 2017 the number of creative businesses in Thanet increased by 84% in the last four years (according to analysis of the Mint List in 2013 and 2016).

Floorspace Developed for Employment Type (all sites in the District)

Table 3 – Commercial Information Audit 2016

	A2/B1 sq m	B2 sq m	B8 sq m	A2/B1-B8 sq m
Completed 2015-2016	2,594	8,102	1,600	12,296
Completed 2014-2015	3,227	2,884	2,594	8,705
Completed 2013-2014	3,032	1,230	210	4,472
Completed 2012-2013	786	1,210	1,998	3,994
Completed 2011-2012	1,490	1,730	549	3,769
Completed 2010-2011	342	300	2,144	2,786
Completed 2009-2010	1,156	343	144	1,643
Completed 2008-2009	16,731	523	4,765	22,019
Completed 2007-2008	4,269	150	3,875	8,294
Completed 2006-2007	3,860	1,889	13,031	18,780
Completed 2005-2006	3,523	9,797	4,585	17,905

2.18 This demonstrates employment completions have been growing year on year since the ELR was published in 2010.

Count of Active Enterprises

Table 4 – Count of Active Enterprises

2010	2011	2012	2013	2014	2015	2016	2017
3,120	2,985	3,045	2,995	3,085	3,490	3,655	3,795

(Source: Inter Departmental Register (ONS))

2.19 The above table shows that the amount of active enterprises decreased slightly 2010 but has increased since 2015 and has remained at a fairly constant rate over a 2 year period.

Key Findings:

- Very little has changed in terms of Thanet's socio economic situation since the 2010 Employment Land Review. Thanet's economic profile is improving but is still not comparable with Kent, the South East and England.
- Strong sectors in the Thanet economy are retail, accommodation & food services, education and health
- In line with the UK trend Thanet is relatively strong in high tech manufacturing
- A particular growth area in Thanet is the Tourism sector.

Commercial property market

3.1 The 2010 Employment Land Review looked at the perception of Thanets Commercial Property Market by surveying Agents and concluded that the main demand and growth is coming from the local market and that there is little interest in companies or large investors wishing to relocate to Thanet.

3.2 This same survey was carried out again in 2012 and conclusions drawn are that the main types of businesses wishing to locate in Thanet currently are retail operators and reasonable quality light industrial/workshop units for small to medium sized enterprises and some engineering, manufacturing, ICT and environmental technology.

3.3 Regeneration in the District, the availability of funding and grants and transport links were seen as a positive attraction to businesses, as was the availability of training opportunities. Distance from established commercial centres (or perception of), planning constraints and high business rates were identified as factors that deter investment.

3.4 When asked about the commercial property market over the next fifteen years and what type of property should be provided and in which location respondents indicated there is likely to be a shift towards more internet and remote based working/consumerism. They identified a need for greater flexibility on employment sites with short leases that are easily sub divisible and easier changes of use. Light industrial/workshop/storage should be provided in accessible out of town locations with good access to transport links and trunk roads.

3.5 Locate in Kent (LiK) have emphasised that perception is a real barrier in demand for commercial property in Thanet. There is a perception that the District is hours from London and that road and rail infrastructure is inadequate. This is a not a true assumption but the problem of perception is a difficult one to tackle.

3.6 In November 2011 LiK carried out a survey of 158 companies with 10 or more employees, excluding schools, supermarkets and the public sector, but was also sent out by Dover and East Kent Chamber to an unknown number of other companies. 34 responses were received including 6 from members of the Thanet Business Forum, 5 other large companies and 23 mainly SMEs including one hotel, one business centre and two visitor attractions.

3.7 The majority of companies expected that their companies still to be In Thanet in 3 years with many anticipating needing space over the next 5 years. Over a third of the companies export and a number more were planning to.

3.8 The main opportunities for growth in Thanet in the next 5 years were seen as Manston, wind power and green energy supply chains, high speed rail, Ramsgate Port, tourism and agribusiness. The main threats and barriers to the business community included attracting suitably qualified staff and lack of finances to support escalating business costs. Some cited transport connectivity and planning difficulties. A number selected the availability of development land.

3.9 Priorities for the area were considered to be improve transport and infrastructure, grants loans and support, better planning and training and education.

Supply and Demand

3.10 The 2010 Employment Land Review considered data provided by Locate in Kent that show the supply and demand of Commercial Property in East Kent. The information is calculated from the number of enquiries that Locate in Kent receive and the level of supply is derived from Locate in Kent's property database. The same data source was reviewed in October 2012 and the following conclusions were drawn.

3.11 Previously the ELR showed that in the smaller industrial premises ranging from 0-1000sqm the match between supply and demand was relatively even. This is now showing that supply is greater than demand. This is also the case in the larger premises + 1000sqm

3.12 In terms of office premises less than 1000sqm the gap between supply and demand is noticeable with supply being much greater than demand and this was the case in the ELR. With regard to larger offices they are evenly matched.

3.13 Demand for industrial premises is still higher than for offices premises

3.14 BBP SQW as part of the development of Thanet's Economic Growth Strategy identified the following regarding Thanet's commercial property market:

Strengths

- Significant recent investment in connectivity, both rail and broadband, which has positioned Thanet as a strong business location with good access to London and to the rest of Europe
- Opportunities to develop an Advanced Manufacturing Park, working collaboratively with local education providers and employers and taking advantage of the districts location to Discovery Park
- The confidence gained from recent increases in the number of enterprises in the District and the number of residents in employment
- A growing and successful cultural offer and presence linked to Turner Contemporary and other local galleries/outlets, and opportunities to build on this
- A relatively competitive location (in terms of land and labour costs) in the greater south east, which can act as an incentive to both business investment and residents
- A port that can, potentially, grow significantly further in terms of commercial throughput, offshore energy facilities, the development of an "off-site commercial hub" and leisure uses
- High quality environmental assets – with an outstanding coastline and natural light conditions that are a significant asset, and wider possibilities for agritech applications in this context
- A commitment to investment in STEM sectors within the District, from Canterbury Christ Church University and East Kent College, including the potential to develop the "green-tech" sector

- Growing business representation in the creative sector over recent years, and associated skills development through FE and HE institutions
 - Substantial planned housing growth – and associated population growth, creating inherent economic potential
 - Possibilities linked particularly to the work of the Thames Estuary Growth Commission
 - A progressive and committed District Council, delivering award winning services for its residents and businesses
- Weaknesses
- A need for further investment in workforce skills
 - Viability and developer challenges in the successful delivery of new development or relocation of existing businesses on major employment sites
 - A tourism sector which is important to the area, and where growth in private investment in recent years needs to be supported and developed further. Hotels are at capacity at peak times and a lack of high quality accommodation
 - Towns in need of a more clearly defined economic purpose; within specific areas / zones
 - Increased competition and market challenges are impacting upon town centres – which in the context of fastchanging public expectations requires a renewed focus
 - Ongoing uncertainty surrounding the future of the former Manston Airport site
 - Uncertainties linked to the process of Brexit
 - Despite growing confidence within the area, there are still some external perception issues to be addressed
 - A Local Enterprise Partnership that is becoming more complex and competitive and where Thanet needs to promote its priorities and justify its “asks”

Key Findings

- There is still little demand for office premises
- The main type of businesses locating in Thanet are retail operators and reasonable quality light industrial/workshop units for small to medium sized enterprises and some engineering, manufacturing, ICT and environmental technology.
- There is a need for flexibility on premises and employment sites with shorter leases and easier changes of use.

Functional Economic Area and Floorspace Requirements

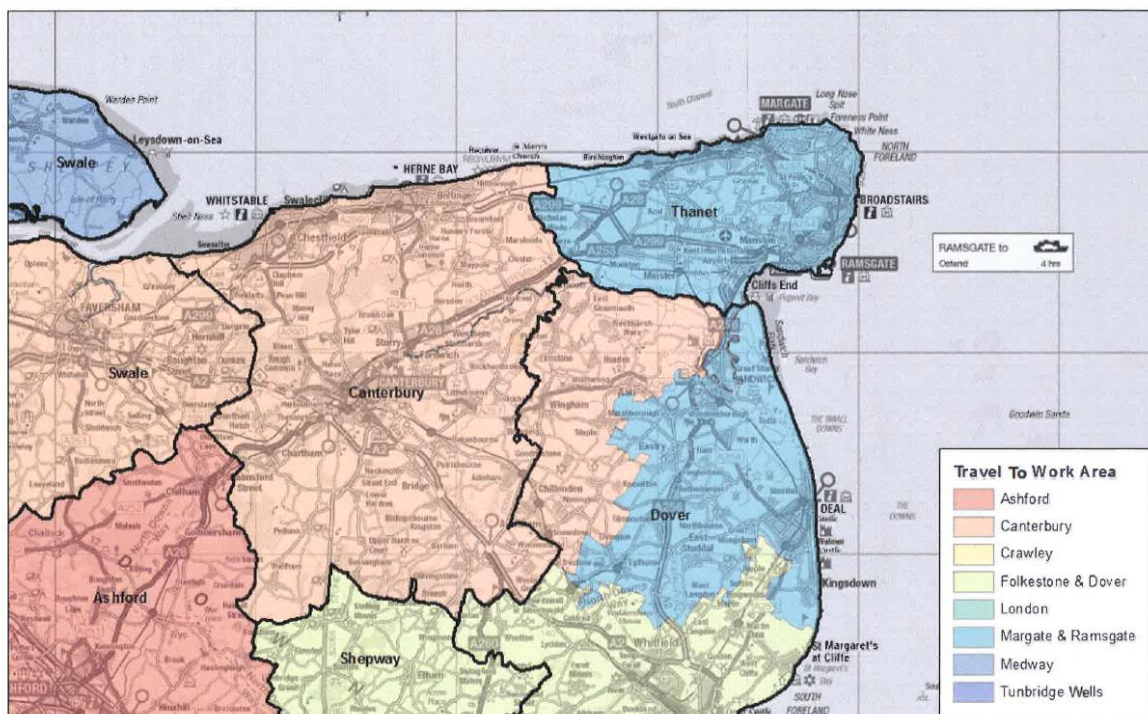
Functional Economic Area

4.1 National Planning Policy Guidance suggests that in order to establish functional economic areas we must take account of the extent of any LEPs operating in the area, travel to work areas, housing market area, the flow of goods, services and information within the local economy, service market for consumers, administrative area, catchment areas of facilities providing cultural and social wellbeing, and transport network.

4.2 The South East Local Economic Partnership (SELEP) covers East Sussex, Kent, Medway, Southend and Thurrock.

4.3 According to the census 2011 the travel to work area for Thanet is called the Margate & Ramsgate Travel to work area. It includes the whole of Thanet and extends southwards down the Richborough corridor and includes the towns of Sandwich and Deal. Recent improvements to the A256 have made travelling to work easier and quicker and have extended the travel to work area from the 2001 Travel to Work area. It is considered that much of this travel can be attributed to Discovery Park which attracts workers from Dover, Thanet and Canterbury and the types of business in zone since its designation has diversified whereas once it was more specialised science based research and development.

2011 Census Travel to Work Areas in East Kent



This map produced by Strategic Business Development & Intelligence, Kent County Council
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4.4 Guidance also suggests that in order to understand your economic area you should also look at your housing market area. GL Hearn in the Strategic Housing Market Assessment January 2016 concluded that the best fit housing market area for Thanet included Canterbury and Dover. Collectively these authorities demonstrate a commuting self-containment level of between 79-87%. The report also concluded that there is an East Kent housing market area which includes the whole of the local authorities of Canterbury, Dover and Thanet, together with parts of adjoining authorities – including Faversham in Swale, Chilham in Ashford and Folkestone in Shepway. Evidence from Dover District Council's SHMA suggests that Dover shares a housing market area with Shepway and not Thanet and therefore Dover District Council object to their identification in the Thanet Housing Market Area. However, there is a clear economic relationship across East Kent and this is reflected in the east Kent Growth Framework.

4.5 Service facilities in the Westwood area have an element of cross boundary draw particularly from some centres located close to Thanet notably Canterbury, Dover, Deal, Herne Bay and Sandwich albeit small (Table 4B Comparison Shopping Penetration Rates 2012, Thanet District Council: Town centre Retail, Leisure, Tourism and Culture assessment. Appendices December 2012). And equally Canterbury is the principal service centre in east Kent and therefore Thanet has a strong economic relationship with the centre there. The Town Centre, Retail, leisure, Tourism and Culture Assessment for Thanet 2012 includes a survey of shoppers in Thanet Centres asked which other regular shopping destinations centres are regularly (Table 7.7 of the Appendices) used and this showed that a large amount of people shop in Herne Bay and Canterbury and some travel to Sandwich, Deal and Whitstable.

4.6 It is concluded therefore that in terms of defining the functional economic area for Thanet there is a strong relationship between the whole of Thanet, north eastern Canterbury District following the routes of the A28 and A299, along with the northern part of Dover District served by the A256 in particular Sandwich and Discovery Park.

Economic Forecasts

4.7 When evaluating economic forecasts the National Planning Policy Guidance states that plan makers should consider:

- Sectoral and employment forecasts and projections (labour demand)
- Demographically derived assessments of future employment needs (labour supply techniques)
- Analyses based on the past take-up of employment land and property and/or future property market requirements (past take up)

Labour Demand

4.8 Potential scenarios have been identified for the economic future of Thanet. These have been developed following a thorough review of the economic situation in Thanet, including identifying the potential threats and opportunities that exist, a review of the relevant policies, plans and strategies, as well as stakeholder input. Experian were commissioned to develop and test the following scenarios:

- Baseline (economy continues to perform in the way it has done in the past)

- Policy – on (assumes high growth especially in the green and tourism sectors)
- Risk Based (assumes that the economy returns to recession)

4.9 The different scenarios are discussed in more detail in the Employment Topic Paper 2013. The report also looked at growth scenarios for the airport. Due to uncertainty surrounding the airport this was done as a separate exercise. The airport high growth option assumes that the airport grows in line with the 2009 Airport Masterplan and this would result in 2,420 jobs. The airport low growth option was devised by Experian looking at similar sized airports and passenger numbers growing to 200,000. The low growth option resulted in a figure of 240 jobs in the district. Due to the level of uncertainty surrounding the airport including unachieved growth targets, the wider economic situation, the relatively peripheral location of the airport, uncertainty at the time over the Governments intended aviation policy and at the time the airport being up for sale it was considered that the low growth scenario should be planned for. This is still the case following closure of the airport as it is reasonable to assume that the site will deliver growth over the Plan period in some form.

4.10 Following consultation and Sustainability Appraisal at Issues and Options stage an overall job growth target of 5,000 jobs for Thanet was selected. This reflects a level of growth between baseline and policy on with an element of growth from the airport site.

4.11 Translating the labour demand method into floorspace the Economic and Employment Assessment concluded that Thanet need to plan for between -15 to 3 (ha) of B use class land during the plan period to 2031, see Table below. The range reflects the three scenarios, Baseline, Policy on and Risk based. It should be noted that this is a net figure and assumes the losses of B2 manufacturing uses would have already occurred; therefore in order to ensure that land would be available if the new development were to come forward prior to the loss of existing floorspace, it is considered necessary to plan for the gross increase required, which is in the region of 15 ha. The Assessment concludes that a margin of error will also need to be factored in.

Land and Floorspace requirements 2011-2031

Use Class	FTE Employment change 2011-31	Floorspace Need (sqm)	Land Need (ha)
B1	700 to 1,000	10,500 to 15,000	3 to 4
B2	-1,400 to -1,000	-63,000 to -45,000	-18 to -13
B8	0 to 600	0 to 42,000	0 to 12
Total B Class	-700 to 600	-52,500 to 12,000	-15 to 3

Source: Experian Economic and Employment Assessment 2012

Labour Supply Technique

4.12 The East of England Forecasting Model (EEFM) was developed by Oxford Economics to project economic, demographic and housing trends in a consistent fashion to inform spatial strategies. The overall Model structure captures the interdependence of the economy, demographic change and housing at a local level, as well as reflecting the

impact of broader economic trends on the East of England. The employment forecasts take account of the supply and demand for labour, the demographic forecasts reflect labour market trends as they are reflected in migration (and natural change indirectly), and the housing forecasts take account of both economic and demographic factors. This structure allows scenarios which test the impact of variables upon each other – for example, the impact of housing supply on economic variables (EEFM Technical Report January 2015).

4.13 The Thanet Strategic Housing Market Assessment produced by GL Hearn in January 2016 looked at the range of 1,200 – 5,100 additional jobs, with the latest forecasts from the East of England Forecasting Model (EEFM) projecting growth in employment of 4,800 (baseline) between 2011-31 (equivalent to 0.5% growth in jobs pa). Taking account of commuting dynamics and the potential for some people to hold down more than one job, it is anticipated that this would require an increase in the resident workforce of up to 5,600 persons over the 2011-31 plan period.

4.14 In addition Kent County Council's Economic and demographic forecasts for Thanet District Council from February 2013 suggest that under the Short Term Migration Trend projection suggests an additional 5,800 jobs could be supported by the population growth associated with this projection (Table 4). This level of growth is broadly comparable, though slightly above, the job growth driving the policy on scenario.

4.15 Taking in to account the range of labour supply forecasts about the amount of floorspace to provide for would approximately be between 12 and 15 hectares.

Past Take up of Land

4.16 The Guidance also suggests that we also have to look at the past take up of land when formulating the amount of land that has to be provided for. In order to do this we looked at the past ten years of employment land delivery from the adoption of the Thanet Local Plan 2006. This concludes that the past take up of land averages out 10,446sqm per annum and this multiplied by the remaining plan period (x15 years) gives a potential floorspace requirement of 15.7.

Projection to the end of the plan period (as at 2016)

	Change 2006-2016	Annual Average	Requirement to 2031 sqm/ha (x15 years)	
B1	41,010	4,101	61,515	6.2
B2	28,158	2,816	42,240	4.2
B8	35,495	3,550	53,250	5.3
TOTAL	104,663	10,466	156,990	15.7

(A2 completions average 168sqm per annum so this has a negligible effect of the overall figure equating to 0.25ha over the plan period. This is an average that comes from CIA Table 4A in the 2016 KCC document. Prior to 2008 A2 was included with B1 in monitoring)

4.17 It is significant to note that the period looked at for the past take up of land calculation (ie to the period of adoption of 2006 Local Plan) includes a period of national recession and therefore does not represent an overly ambitious forecast result.

Conclusion

4.18 The labour demand forecast suggests that the amount of land to be planned for in the district varies between 3 and 15 hectares. It is considered that to plan for the risk based scenario would not represent positive planning and therefore a level between 'baseline' and 'policy on' was chosen. Given the uncertainties surrounding economic forecasting two other forecasting methods were also assessed. Past trends and labour supply forecasts suggest that a figure towards the higher range of the 3 scenarios set out in the labour supply calculation is more appropriate therefore it is considered that the land supply to be planned for should be 15 hectares.

Key Findings:

- It is concluded that Thanet's functional economic area is East Kent and particularly Canterbury and Dover districts.*
- In terms of Economic Forecasts the labour demand forecast suggests that the amount of land to be planned for in the district varies between 3 and 15 hectares. Past trends and labour supply forecasts suggest that a figure towards the higher level is more appropriate and therefore it is considered that the land supply to be planned for should be 15 hectares.

*Dover District Council objects to Dover's identification within Thanet's housing market area.

Review and appraisal of existing sites/floorspace update

5.1 The NPPF says at paragraph 22 that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities. Therefore it is appropriate to carry out a further review of employment sites based on the latest evidence. This derives from the Economic and Employment Assessment 2012, the Employment Land Review 2010 and the updates in this document.

5.2 The 2010 Employment Land Review looked at the Allocated Sites, Retained Sites and Additional Sites. An update of this follows:

Employment Land allocation strategy

5.3 This section of the document firstly looks at the conclusions of the 2010 Employment Land Review, outlines current circumstances and reviews the sites in accordance with new information available.

ELR Conclusions

5.4 The 2010 ELR suggested that based on projections that 51.6ha (including element of contingency) of employment land was needed to the end of the plan period which at the time was 2026. A generous supply was recommended due to the nature of the Thanet economy and the need to stimulate growth and ensure that no significant opportunities are lost.

5.5 Projections indicated that 37% of floorspace/land is required for B8 development, 36% for B1 development, and 27% for B2 development. B1 development should exist close to town centres and urban areas. Sites for B8 uses should be available with good access to the strategic road network, and B2 uses should be provided away from residential areas. The report concluded that a range of sites which are suitable for both inward investment opportunities, and accessible to growth in existing markets should be considered. New development needs to be flexible and affordable to the local market, and in particular the provision of starter units and mid range property.

5.6 The ELR found there were 12 sites with land available for future development totalling approximately 85ha of undeveloped land plus an additional two sites with potential for future development – the latter which are the Fire Training School and the Northern grass airside development area at the airport. 74.5ha of land was considered good or excellent quality for future employment purposes and suitable for a mix of B1, B2 and B8 uses. The ELR also recommended that the 24 existing retained sites allocated in the Thanet Local Plan 2006 should remain retained. The sites were scored according to their marketability, sustainability, deliverability and strategic planning factors. Many of the sites scored good or excellent against these criteria however, it was noted that a number of the retained sites exhibited relatively poor building quality, and whilst they were currently functioning well as employment locations, the condition of the

buildings could affect future functionality. The sites in greatest need for renewal/upgrade were:

- Dane Valley Industrial Estate, St Peters
- Princes Road Depot, Ramsgate
- Factories, Suffolk Avenue
- All Saints Industrial Estate
- Parts of Haine Road, Pysons Road and Westwood Industrial Estate

5.7 The ELR also scored a number of additional employment sites that were over the 0.25 ha threshold. These sites were considered for retention to avoid their loss to alternative uses.

5.8 Manston Business Park was considered to provide the ideal site for inward investors and potential development opportunities for growing existing businesses in the district to relocate. In view of their sustainable location, the slow take up by traditional employment uses and given the overall quantity of employment land both Eurokent Business Park and Thanet Reach Business Park were considered to have potential for partial release.

5.9 The ELR also concluded that there was demand for property from within the local market on a smaller scale. Despite the economic situation being poor, the vacancy levels for these types of property were low showing a demand. It concluded that the most crucial factor for the indigenous market is that the premises are affordable. The important role of start up space was also recognised, which provide small scale, flexible units with easy in/out arrangements – there are three innovation centres across the district which serve this important role (the Kent Innovation Centre, the Marlowe Innovation Centre and the Margate Media Centre).

5.10 Rural provision was also considered but with the proximity of Thanet's rural areas to the urban areas, the strategic sites and the existing allocation of Hedgend Industrial Estate in St Nicholas at Wade indicated no need for additional rural employment land allocations. The ELR concluded that the majority of rural space is provided through conversion of redundant agricultural buildings, and evidence suggests that these are popular types of accommodation for business in Thanet.

Forecasted demand for employment space and current situation

5.11 In December 2012 the Council commissioned an Economic and Employment assessment which looked at job growth forecasts to the end of the plan period (now 2031). The assessment looked at what sectors of the economy are likely to grow and what this means in terms of floorspace that will need to be planned for. The report looked at a range of job growth scenarios and concluded that between 3 and 15 hectares of employment land is needed over the plan period. (More detailed information on this is contained in parts A and B of the Employment Topic Paper and the Economic and Employment Assessment 2012). This report also explores other methods of economic forecasting and considers their results.

5.12 According to evidence in 2013 Thanet had approximately 74.64 hectares of allocated employment land currently available. In addition to this there is 86.41 hectares of established employment floorspace that is retained through saved policy EC12 from the Thanet Local Plan 2006. On these retained sites there is also a remaining developable area of 6.4 hectares.

5.13 While planning for a generous supply of employment land is important for Thanet there is clearly a current oversupply of land over the new plan period to 2031. The economic and employment assessment concludes that only 30% of employment growth is likely to be within the traditional B use classes that are found on business parks such as manufacturing, construction, and distribution. The major areas of growth over the plan period are within the green economy and tourism sectors. (Economic and Employment Assessment 2012)

5.14 The primary green sector includes green infrastructure activities such as landscape architecture and nature reserve activities and waste management activities such as recycling and wholesale of scrap. Secondary green sector activities include energy equipment manufacture and professional, scientific and technical activities. Tourism sector activities include hotel, restaurant and bar activities, travel agency and sports/recreation activities. Some, but not all green economy sector activities will need to be accommodated on employment land, however the majority of tourist uses will not.

5.15 Another area of predicted growth is the service sector which includes town centre uses such as retail, accommodation and food services, professional services such as legal and accountancy. Government services such as education, residential and social care and health services are also estimated to grow over the plan period. Sui generis uses are uses which do not fall into a particular use class and include such uses as petrol filling stations and motor car showrooms and clearly we will need to be flexible with employment land to ensure all types of growth are accommodated.

5.16 It is clear from the evidence that traditional employment sites are not as much in demand, and employment growth is occurring in other sectors. In order to respond to this we need to review our strategy in terms of the allocation of employment land and consider the need to be flexible with the land we have in order to support the employment sectors that are growing in the District.

The Allocation Strategy

5.17 The Employment land review concluded that we need 7.7ha (baseline) of employment land to 2026 which is not at odds with the findings of the Economic and Employment assessment 2012 which concluded that we need between 3 and 15 hectares. This is significantly below what is allocated in the current local Plan and given the latest policy position with the National Planning Policy Framework a review of the allocated sites with a view to deallocating those which are not fit for purpose was appropriate.

5.18 Many of the conclusions of the ELR are still relevant. There is still a need to provide land for potential inward investment that also provides opportunities for growing existing businesses to relocate to and there is also a need for affordable premises from the indigenous market and start up space also fulfils an important role.

5.19 Also since the ELR was written and as discussed earlier in this document the Pfizer pharmaceutical plant at Sandwich closed and the Discovery Park Enterprise Zone has taken its place. With the range of benefits offered by its enterprise zone status available

just across the district boundary the park is likely to have an impact on the demand for employment land in Thanet. The proximity of the enterprise zone to Thanet is positive for employment and it is considered that Thanet should align its economic strategy in order to complement Discovery Park.

5.20 As an overall strategy we need to cater mainly for small to medium businesses and tourism and leisure related trade. We also need to make some land available for larger businesses although some of these businesses may be drawn towards Discovery Park. Thanet's employment allocations will complement this trend. Some of the poorer quality retained sites in the urban area will be released in order to trigger reinvestment in some of our larger established sites such as Pysons Road, Haine Road and Westwood Industrial Estate as parts of these sites were recognised as needing renewal/upgrade in the ELR. We will need to protect some sites to ensure they are not lost to higher value uses such as housing, small employment sites that are important to the local economy and located within residential areas are particularly vulnerable. Good quality sites that are within the urban and rural confines will be retained, and of particular importance are quality sites that support our SME's such as Manston Green. Where possible there should be a balance of sites across the District.

5.21 Discussions with stakeholders have revealed the need to keep a range of sites for cheap premises and business start ups. We also need to retain some sites that can accommodate "dirty uses" such as paint spraying and tyre recycling. Some sites are also needed in the rural area to support the rural economy in line with the National Planning Policy Framework. We need a "flagship" site for inward investment and that can accommodate growing indigenous businesses.

5.22 Evidence also shows that we need "flexible" sites on which we can accept alternative non B use class uses as there is potential demand for employment generating uses that are currently not provided for.

Sustainability Appraisal

5.23 The Interim Sustainability Appraisal published in May 2013 assessed options for determining the amount of employment land required, and continuing to protect existing employment sites. It concluded the following:

Amount of employment land

5.24 In relation to how much employment land is needed, the initial SA assessment looked at the following options:

- Employment growth forecasts (from Experian)
- Previous rates of take up of land
- Maintaining the existing supply of land
- Include contingency when determining the amount of land to allocate

5.25 The sustainability appraisal concluded that it is difficult to assess the options in relation to the amount of employment land, due to uncertainties associated with the type of development, density and location. The only indicators where there were differences between the options were related to economic development.

5.26 Maintaining the existing supply of employment land and allowing for additional land to ensure flexibility and choice, performed the best.

5.27 The difficulty in assessing these will be overcome at the site allocations stage and potential development management policies will also help to mitigate against potentially adverse effects.

Location and Type of Employment Land

5.28 In relation to the location and type of employment land the sustainability appraisal considered the following options:

- Relax the uses permitted on some of the allocated employment sites to allow other employment generating uses outside of the B classes.
- Maintain a variety of sites in a range of locations across the district
- Provide all employment land in a single location or cluster in the district
- Use of allocated supply to select sites

5.29 The option to use the existing allocated supply from which to select sites is less likely to result in adverse effects and has the greatest opportunity to deliver beneficial effects. Concentrating employment sites in one area (at the single site or cluster) could disadvantage the rest of the District. The single site option could also result in residents having to commute longer distances to get to work and therefore they would be more reliant on the private car.

5.30 All of the options are likely to have a beneficial effect on economic growth within Thanet. In most cases potentially adverse effects can be mitigated against during the assessment of allocations.

Protection of existing employment sites

5.31 The two options assessed were whether to continue with policy protection for identified employment sites from the 2006 Thanet Local Plan. The option to continue with policy protection was predicted as having the potential to result in a significant positive effect, particularly in terms of job creation and supporting economic growth. The option to cease the policy protection performed better in terms of its potential to have indirect benefits for housing by potentially allowing a greater area of land for housing and other types of development. Neither option resulted in a significant adverse effect.

Individual site assessment and how the sites fit into the strategy.

5.32 This section reviews each employment site from the ELR individually. The sites have been scored using the same methodology as the Employment Land Review i.e. marketability, sustainability and deliverability. Strategic planning factors was removed as a category as there is no strategic plan in place with the abolition of the south east plan. More information on scoring methodology can be found in the Employment Land Review 2010. This section also provides an update on circumstances, and assesses how successfully each site fits into the new allocation strategy before making recommendations.

5.33 It will be necessary to keep under review the portfolio of sites especially given the recent duty on commercial premises to have Energy Performance Certification. Measures may be expensive to retrofit and may have an impact on some of the older stock.

Manston Business Park

5.34 This is the largest area of employment land in Thanet. It is still considered to be ideally located for inward investment as it is centrally located adjacent to the airport and near the port. The site enjoys very good road infrastructure with access dual carriageway access to the M25 and the East Kent Access road to the south. The site is owned by East Kent opportunities which is a joint venture between Kent County Council and Thanet District Council to bring forward economic growth and regeneration, and is marketed by Savills.

5.35 Current occupiers of the sites are Summit Aviation, Invicta produce, and Cohline. There has been a recent completion of 3 business units 2,345 in size for B1, B2 and B8 use on the corner of Invicta Way and Columbus Avenue and one of the units will be occupied by Rowe Atlantic.

5.36 There has also been a large development by Manyweathers Property Ltd constructed on the corner of Columbus Avenue and Invicta Way.

5.37 There is also planning permission for a development of 46 industrial units and 4 office units on the opposite side of Columbus Avenue.

5.38 This site scored a high 12 out of 15 mainly due to its prime location with good/recently upgraded transport connections and recent developments indicating that the site is marketable.

5.39 This site is considered to be the flagship inward investment site for the district and its allocation should be carried forward. It is approximately half developed and there is some infrastructure in place. As this site is somewhat unique it is considered that a range of other employment sites should be allocated in the plan period to provide a range of sites

Eurokent Business Park

5.40 This site is well placed and situated roughly equidistant between the three main Thanet towns. It is located between the recently developed Westwood Town Centre, a retail and leisure hub, and the Royal Harbour Academy School. This is a highly accessible and sustainable site with the Eurokent, highway improvements and infrastructure are already in place for the site.

5.41 The most northern part of the site was developed for leisure uses in 2007, as part of the Westwood Cross development, and houses a multiplex cinema, restaurants and Casino. The Grupo Antolin building has been demolished and has been replaced by the new Sainsburys Store. The centre of the site remains undeveloped, with approximately 20 hectares of vacant land. At the south of the site lies the Marlowe Innovation Centre, which was completed in August 2008, and provides affordable accommodation for innovative small businesses, with a mix of light industrial and office space. Adjacent to this is the *Eurokent Business Park*, a joint venture by SEEDA in conjunction with Thanet

District Council, comprising a high quality scheme of imaginatively designed units, with flexible accommodation serving a mixture of B1, B2 and B8 uses. At the time of visiting three industrial units and one office unit were vacant although later information has revealed that two of the industrial units are due to be sold. Laleham School has also recently been relocated to the southern part of the site.

5.42 A planning application was submitted for a mixed-use development for up to 350 dwellings; up to 63,000sqm Class B1 business floorspace and sui generis use; a new local centre comprising up to 2,000sqm convenience retail (class A1, A2, A3), community facilities up to 5,000 sqm (class D1/D2) and community healthcare up to 1,200sqm (class D1). This was refused by the Council and the subsequent appeal upheld (APP/Z2260/A/14/2213265) allowing up to 550 dwellings, up to 54,550sqm class B1 floorspace, car showroom of up to 8,151sqm, a local centre comprising up to 2,000sqm Class A1 (Shops), Class A2 (Cafes and Restaurants), community facilities up to 5,000sqm (Class D1/D2) and community healthcare up to 1,200sqm (Class D1), and associated highway works. The permission contains a series of “up to” statements and the site cannot accommodate all of the aforementioned quantum’s.

5.43 The site scored 11 out of 15 in the rescoring exercise mainly because of prime location. Due to its location close to the commercial area in Westwood this site is considered suitable for flexible uses and should be allocated as such and it may be appropriate to de-allocate some of the site.

Thanet Reach Business Park

5.44 This site has good cycle and pedestrian links and is close to the Westwood area. It has been partially developed for Canterbury Christ Church College and the Kent Innovation Centres. A substantial part of the site is still undeveloped and as reported in the ELR the now East Kent College is no longer wishing to locate its campus at Thanet Reach. It is considered that the site is suitable for B1 business and education uses. It is considered that the Northern part of the site should be retained so that the expansion of the current uses which is high quality, managed workspace for start up and indigenous business is not stifled. There is also potential for expansion of the University and this should be encouraged on the Northern part of the site.

5.45 The site scored 11 out of 15 as the site is available and in a good location. Uses may be constrained by the predominantly residential location.

Manston Road, Ramsgate

5.46 The allocated parts of the site are split in two. On one of the sites is the Beacon Centre which accommodates the Thanet NHS Community Health Team. The remaining developable land and the other site to the south is vacant with poor accessibility. With regard to the retained parts of the site the Old Timber Yard is poorly maintained with no vacant units and the section containing the Flambeau Europlast building is in very poor condition.

5.47 The allocated parts of the site containing the NHS Beacon development and the remaining developable land scored 10 out of 15. The site is good quality and in a fairly sustainable location but has remained vacant. Given the downturn in the market and the availability of other land it is unlikely to be developed in the future.

5.48 The retained parts of the site incorporating the Old Timber yard and the Flambeau Europlast section scored 8 reflecting the poor quality of the sites and that redevelopment is likely to be unviable.

5.49 The retained site is not viable for business use to the end of the plan period and there is little demand for the allocated sites. Therefore it is considered that both the retained and allocated parts of the site should be de-allocated.

5.50 Flambeau had indicated that they wished to relocate so this should be deallocated. Outline consent for 120 houses was granted in 2017. The Old Timber Yard, despite being of poor quality was fully occupied and therefore retention in the short term is considered appropriate. It is recommended that the site be protected during the plan period to 2031 and reviewed thereafter.

Hedgend Industrial estate

5.51 The buildings at Hedgend are good quality and comprise a range of sizes. Hedgend is in a rural location with good access to the A299 Thanet way. The site is busy and appears suitable for general industrial use. The site is still considered ideal for distribution activities. The site is in an isolated location, well shielded from view and away from residential properties and it is therefore considered that this would be a suitable site for dirty uses which it is understood there is some demand for.

5.52 Land at McNab kennels previously had outline permission for the erection of three buildings for general industrial use B2 comprising 12 units.

5.53 The site scored 10 out of 15 as it is well located in terms of access to the primary road network rather than sustainability and that is proving a popular site with scope for further development.

5.54 As the site is functioning well, may be likely to expand in the near future and fulfils a role within the strategy for dirty uses it is considered that this site should continue to be allocated.

Westwood Industrial Estate

5.55 This is the largest retained site located on the main road network and it contains a mix of industries and uses including a church/community building. The site contains 3 retail units, and has partly been developed for residential. There is also the Thor Chemicals section of the site which has been decommissioned.

5.56 The site has many different sections containing both small and large units and these vary in quality. The greatest vacancy at the time of visiting was 2 or 3 units within the Goodwin Park section of the site with one unit actively being marketed.

5.57 Some sections of the site are in poor repair but overall the site functions well and there is a good turnover of units. It is considered that some reinvestment is needed in the site but it is a large strategic site and important to the overall economic strategy.

5.58 The site scores 11 out of 15 as the site is a popular vibrant site containing a range of employment uses of various sizes.

5.59 This site already caters for a range of uses and is an accessible location in Margate and therefore could be a suitable location for flexible business use and as such it should be retained. The site also has scope to accommodate future employment generating development.

Pysons Road Industrial estate

5.60 This is a large, important and well established site located on the main road network. It is occupied by a variety of businesses with a significant amount of heavy/specialist B2 industry such as Fujifilm. This site is split into many sections with varying quality and some are quite poor particularly the Lysander Close section with 4 buildings apparently vacant and parked vehicles over pavement and verges. The site as a whole appears to function well and has fairly low vacancy rates. The appearance of Pysons Road as a whole is pleasant with the largest business on the site, Fujifilm, being the main visual focus within attractive open landscaping.

5.61 The site scored 11 out of 15 as it is a large popular site with a range of premises. Like Westwood Industrial Estate, some sections of the site are in poor repair but overall the site functions well and there are a good turnover of units. It is considered that some reinvestment is needed in the site but it is a large strategic site and important to the overall economic strategy.

5.62 It was considered that parts of the site should be considered for de allocation because complaints had been received from the residents of Hopes Lane about the industrial units opposite. The buildings of the former Focus DIY also do not contribute positively to the Pysons Road Industrial Estate.

Dane Valley Industrial Estate

5.63 This is a large site occupied by a wide variety of business and industry but parts of the site are in extremely poor condition. It is very busy with only 2 or 3 apparent vacancies. The site layout is confusing and presentation generally poor and in parts parking is very bad. The Site contains St Peter's House, an office of Kent County Council.

5.64 The site was scored in two sections. The developed part of the site scored 9 as it has some access and parking difficulties. However the site proves extremely popular and is occupied by a range of business. The site also provides crucial cheap business accommodation that supports our local small to medium enterprises and the site is still expanding.

5.65 Since the ELR was completed a development of 7 industrial units has been erected. This is called the Copper Leaf Business Park.

5.66 The undeveloped part is owned by UK Power networks and does not form part of the business park. It is separated from the rest of the site by the railway line and access is poor. Given the downturn in the market, low demand and the constrained nature of this site the undeveloped part of the site is considered unsuitable for business use.

5.67 It is considered that undeveloped parts of the site should be de-allocated but the remainder of the site should be retained in order to trigger reinvestment in the poorer parts of the site.

Haine Road (Leigh Road) Industrial Estate

5.68 This is a large site on the urban edge of Ramsgate that is well located on the road network. The site has a mix of buildings of different ages and sizes that are in generally satisfactory condition. The site layout and presentation is good but parking is inadequate. There is a high take up of units with only 1 or 2 appearing vacant at the time of visiting. There is a large sign company presence on the site.

5.69 The site scored a high 13 out of 15 due to its sustainable location, proximity to the primary transport network and popularity.

5.70 The site caters well for an expanding medium sized offer and is therefore an important site to retain. Access to the site is currently limited but a right hand turn lane accessing the site is in the pipeline which will overcome the problem.

Laundry Road (Telegraph Hill) Industrial Estate

5.71 This site is in a good location close to the strategic road network. This access has been further improved by the new East Kent Access road. This is a good popular site in the rural area and units are in demand. A large proportion of the site is occupied by Whites Transport, a local haulage company and this has been recently extended. The site has good buildings, good layout and parking. There appeared to be only 2 vacant units on visiting.

5.72 This site scores 13 out of a possible 15 as it is a popular large site located in the rural area but close to the strategic road network and there is potential for expansion.

5.73 As this site is in good condition, in high demand, and in the rural area it should be considered for retention.

All Saints Industrial Estate

5.74 This site is in poor condition including buildings, external areas and the access road which is unmade. The site is bounded by the railway and some residential units. There was only one vacant unit at the time of visiting. There is plenty of undeveloped land around the site which is currently used as a dumping ground and constitutes a very poor use of the site. The site currently caters for some "dirty" uses but the Council has in the past received Environmental Health complaints related to this from the nearby residents.

5.75 The site scored 9 out of a possible 15 mainly due to the fact that the site is in a highly sustainable location in Margate Town Centre.

5.76 Planning permission for the erection of two industrial units had been granted on a derelict and unsightly part of the site. This has yet to be implemented.

5.77 The site is in poor condition but it caters for dirty uses. It is considered that the site should remain allocated in the short term pending review for the next plan period.

Tivoli Road Industrial Estate

5.78 This site is bounded by the railway line and residential properties. The site comprises three large buildings that are in good condition. Heavy parking in the residential roads surrounding the site is an access constraint for the site.

5.79 The site scored 8 out of a possible 15 as it is located in a constrained residential area and is incompatible with surrounding uses leading particularly to parking and access problems.

5.80 Although the site is currently functioning well it is not suitable for large scale commercial use given the town centre/residential location. Kent Highways have commented that the site is not conducive to large vehicle movements. The site is not suitable for dirty uses as it is not hidden and is in very close proximity to residential properties. The 3 large units represented here are better suited to one of Thanet's larger employment sites.

5.81 As this site is currently full and functioning well it is considered appropriate to protect it in the short term in the plan period to 2031 and reconsider this thereafter.

Cromptons Site

5.82 This site is located in the commercial area of Westwood. It is an excellent modern site occupied by two well established businesses. The high quality buildings are also considered suitable for occupation by other businesses. Poorhole Lane has recently been upgraded providing improved access to the site.

5.83 This site scored highly with 13 out of a possible 15 due to its good location and the overall quality of the site.

5.84 The site is inappropriate for other uses as it is located within the green wedge and therefore it is recommended that this site is retained.

Jentex

5.85 This is a single occupier site owned by Jentex Fuel Oils. The site comprises a mix of buildings, oil tanks and open storage. The owner has indicated that the use is no longer viable and the site is being decommissioned. Four tanks have been removed and the remaining use of the site is holding gas oil for ships which is increasingly being taken direct from the refinery to destination by road. In addition the main road into Ramsgate has now bypassed the Jentex site as part of planned road improvements. The existing buildings are unviable for re occupation by other businesses due to the cost of remediation.

5.86 The site scored 4 out of a possible 15 due to the redundant nature of the site and the site is undeliverable as part of Thanet's employment land portfolio.

5.87 The owner has indicated that their aspiration is to redevelop most and probably all of the site for extra care housing/community related use but there are contamination concerns on the site. For these reasons it is considered that the site should not be retained for employment use.

140-144 Newington Road

5.88 The site was originally occupied by Piper windows but they have since gone into receivership and the site has been redeveloped as a primary school to provide up to 420 school places.

5.89 The site scored 9 out of a possible 15 as it is in a fairly sustainable urban location however, the proximity to the residential areas is a constraint in itself. Access is poor through heavily parked up streets and opening hours have had to be restricted. Kent Highways Services have advised that the site has lorry routing issues and that it is incompatible with the surrounding uses.

5.90 It is recommended that this site is no longer protected for employment uses.

Princes Road Depot

5.91 This site contains a number of small businesses but is in poor condition. It is adjacent to a residential area with a railway line to the north. The site is disorganised and poorly maintained.

5.92 The site scored 9 out of a possible 15 largely to do with its sustainable location. There are a number of businesses operating from the cheap premises on site and one of the units is being upgraded.

5.93 The site is incompatible with the residential area opposite however it is adjacent to the Pioneer business park and is well located close to Ramsgate railway station. The ELR concluded that this site was in need of refurbishment and this is still the case but as this is beginning to happen and the site provides inexpensive units it is considered that the site should continue to be protected.

Pioneer Business Park

5.94 This site is well maintained and is in a sustainable location near to Ramsgate Railway Station. It is not suitable for intensification but caters well for small to medium sized enterprises.

5.95 It scored 12 out of a possible 15 in the assessment and therefore it is recommended that this site is protected.

Whitehall Road Industrial Estate

5.96 This site is located within a residential area and has a mix of B2 uses. It has two industrial buildings dating from the 1970's that are in satisfactory condition which accommodate a number of small to medium sized businesses. There was one vacant unit at the time of visiting.

5.97 The site scores 10 out of a possible 15 as it is a sustainable site within the urban area. It is surrounded by residential uses which make it incompatible with the use of heavy goods vehicles. The site provides affordable premises for small to medium businesses and therefore it is recommended that protection of this site should continue.

Northdown Industrial Estate

5.98 This site contains a single industrial building split into 11 small office buildings. The buildings are in poor condition but the presentation is good. The site is functioning well with only one apparent vacancy.

5.99 The site scores 10 out of 15 as it is a popular site with planning permission. It provides cheap premises for small businesses and is compatible with the Dane Valley Business Park next door.

5.100 In 2011 permission was granted for the erection of a two story office/store building following demolition of garages which was implemented. This demonstrates demand on the site.

5.101 As this site is proving resilient to the economic downturn and provides vital affordable premises it is recommended that protection for the site should be protected.

Suffolk Avenue factories

5.102 This is a small site in a predominantly residential area. There are two large buildings on site, one is in poor condition.

5.103 The site scored 6 out of a possible as the site is wholly incompatible with the surrounding residential area. Access is very poor and the surrounding roads are heavily parked up, and Kent Highways have indicated that there are lorry routing issues. Furthermore, noise complaints have been received by TDC's Environmental Health Department.

5.104 The owner of the site has indicated that they wish to relocate elsewhere in Thanet and redevelop the site for housing. The site has been marketed for employment use and no interest has been shown. For these reasons and considering the low demand for employment land and the availability of higher scoring sites it is considered that this site should no longer be protected.

Manston Green

5.105 This is a small site within Manston village confines and is occupied by small cottage industries. There is currently a new office development underway demonstrating that the site is attractive and in demand.

5.106 The site scored 12 out of 15 as it is very well presented and is compatible with the rural area. At the time of visiting there were no vacancies. This site provides a unique offer in the rural area and is good for small to medium enterprises. It is recommended that the policy protection for this site should remain.

Magnet and Southern

5.107 This site contains a single building with an open forecourt to the front which is presentable. The site is within the Newington residential area and part of the site has been developed for 5 houses.

5.108 The site scored 9 out of 15 as despite its sustainable urban location it is incompatible with the surrounding residential area.

5.109 Given the low demand for employment land and the availability of better scoring sites it is considered that this site should no longer be protected.

St Lawrence Industrial Estate

5.110 This is a very small site with one building split into 5 units containing a mix of small businesses which appeared to be fully occupied. The buildings are in satisfactory condition but access, turning and parking is poor. The site is bounded by residential properties and a school.

5.111 The site scored 12 out of 15 mainly as it is located within a sustainable urban location. The scoring concludes that lorry routing is poor and that redevelopment of the site would be incompatible with surrounding uses but this is not necessarily at odds with the current use of the site which is characterised by small uses where the use of lorries would be unlikely. As the site provides small affordable units it is recommended that protection for the site should be continued.

Fuller's Yard

5.112 This site contains 12 units for office and light industry. The site is owned by TDC and most of the buildings are in good condition. The site is bounded by education facilities and residential. At the time of visiting 5 units were vacant and were being marketed.

5.113 The site scored 12 out of 15 as it is in a sustainable urban location that is well maintained and provides small affordable units.

5.114 Consultation revealed that the site is popular and caters well for small to medium enterprises. As the site is a small scale, town centre site that caters for SME's it is considered that the site should continue to be protected.

Manston Road Depot

5.115 The site comprises TDC's refuse and recycling depot. The majority of the site is open storage. The site has a poor visual appearance but is not visible from the road. The main building is in reasonable condition. There are proposals to erect a waste sorting and transfer building and extend the office and workshop building.

5.116 The site was not re-scored as the site does not contribute to the overall land allocation strategy however it is likely to remain in this use, is difficult to relocate and may need to expand in the future. The site importantly provides for waste uses in Thanet. If the site is de-allocated then it becomes a site in the open countryside and any expansion will be stifled. It is therefore recommended that the current allocation is retained but should not contribute to the employment land supply.

5.117 The Employment Land Review identified a further 13 sites from Kent County Council's Commercial Information Audit and the Business Rates Ratings List, which were considered for protection. These were in addition to those that were allocated and protected in the Thanet Local Plan 2006. The decision was taken not to re score these sites as the National Planning Policy Framework states at paragraph 22 that we should avoid the long term protection of sites for employment use where there is no reasonable prospect of an allocated site being used for that purpose. Thanet is currently oversupplied with employment land and the forecasted need to the end of the plan period along with a margin of error/buffer can be adequately accommodated from the current supply. It would be contrary to National Policy to protect more land for employment purposes to 2031.

5.118 A number of site submissions were received requesting employment land allocations. Consideration of these submissions can be found at Appendix 2.

Omission Site Submissions

5.119 A number of employment omission sites have been submitted during the various stages of Local Plan consultation and these are listed in appendix 2. The floorspace requirement identified can be accommodated by the existing employment allocations from the Thanet Local Plan 2006. In accordance with advice in the Sustainability Appraisal sites were selected for allocation from the current supply effectively meaning that omission sites were not needed as allocated sites have already been assessed for suitability and fitness for purpose. Selecting sites from our current supply (i.e. those allocated in the Thanet Local Plan 2006) was the most sustainable option.

5.120 The Manston airport site was submitted as an omission site in 2015. Given the advice from Avia Solutions report that the aviation use on the site is unlikely during the Local Plan period, and the increased need for housing following the 2016 sub national population projections the airport site was assessed alongside other suitable omission sites that either on their own or in combination were able to form a new settlement. Advice from the sustainability appraisal was that the airport site was considered most sustainable largely due to its brownfield element. The report concludes that sustainability considerations should be at the forefront when considering a new settlement and therefore it was considered that an element of employment use was needed in order for the site to be sustainable. It was concluded that employment land on the site should be allocated and it was considered that this could complement Manston Business Park. The planning application for the site was accompanied by a business plan which detailed that “advanced manufacturing” industrial units were in demand from developing businesses at Discovery Park. This element also complemented Thanet’s Economic Growth Strategy.

5.121 However, despite the identification of a potential new mixed use settlement the Council recognises that a DCO process is underway by RiverOak Strategic Partners to acquire the site for aviation use as an NSIP project.

5.122 The outcome of the process is still unknown and therefore it would be inappropriate to allocate the airport for an alternative use at this stage. This reflects the decision of Full Council in July 2018.

Key Findings and Recommendations

Having assessed the type of employment land needed in Thanet and scored the sites from the existing employment land supply the following conclusions were drawn:

The following sites should be de-allocated from the Local Plan

Manston Road (part)
Thanet Reach (part)
Eurokent (part)

Manston Road was not considered necessary to contribute to the employment land portfolio given the amount of land available and the nearby provision at Manston Business Park and Eurokent. The Southern part of this site was considered surplus to

requirements and potential uses may be constrained by the predominantly residential location. The Northern part of the site is considered suitable for education uses and B1 uses. Again Eurokent is a large site and given the demand for employment land over the plan period to retain the whole of the site as an employment allocation was considered unnecessary. Eurokent remains an important site but it is considered that a mix of uses on the site would be more appropriate. A planning appeal has allowed mixed use development on the site. De allocated parts of Manston Road and Thanet Reach are also being considered through the SHLAA process.

The following sites should no longer be protected for employment purposes:

- Manston Road Industrial Estate
- 144 Newington Road
- Magnet and Southern
- Pysons Road (part)
- Dane Valley (part)
- Suffolk Road Factories
- Jentex

These sites were not considered to contribute positively to the employment land strategy and in many cases were incompatible with surrounding uses.

The following sites scored well in the assessments and provide a range of large and small sites at varying locations around the District. They allow flexibility of uses and cater for all types of business

Allocated sites

Site	Total Site Area (ha)	Remaining employment allocation (ha)
Manston Business Park	75.2	42.53
Eurokent	38.6	5.45
Thanet Reach	9.74	3.7
Hedgend	2.46	1.61
TOTAL	126	53.29

Retained Sites

Site	Size	Remaining developable Area
Cromptons	2.26	0

Haine Road	6.52	0.28
Manston Green	0.38	0
The Old Timber Yard	1.97	0
Pioneer	0.64	0
Fullers Yard	0.17	0
Laundry Road	3.68	0
Pysons Road	20.31	0.52
St Lawrence	0.19	0
Tivoli Road	2.45	0
Westwood Ind Est	25.9	0.75
Northdown	0.89	0
Princes Road	0.98	0.25
Whitehall Road	0.95	0
Dane Valley (developed)	5.04	0

Flexible Sites

It is recommended that the following sites be allocated all or partially as flexible sites as they already contain a strong element of non B uses and they are geographically spread around the District:

- Westwood Industrial Estate (part)
- Eurokent
- Dane Valley Industrial Estate

Employment Land Supply

6.1 The Council has allocated the following sites for employment generating purposes in the Local Plan to 2031. Acceptable uses will be B1 (business), B2 (general Industry) where appropriate, and B8 (storage and distribution) as well as education and flexible uses on some sites. The individual policies provide more detail.

Site	Total Site Area (ha)	Remaining employment allocation (ha)
Manston Business Park	75.2	42.53
Eurokent	38.6	5.45
Thanet Reach	9.74	3.7
Hedgend	2.46	1.61
TOTAL	126	53.29

6.2 It is acknowledged that the amount of land allocated represents a significant oversupply of employment land. However, it is considered that this is justified for the following reasons:-

- The Economic and Employment Assessment 2012 (EEA) Experian suggested that:
Based on these figures it is evident that the requirement for employment land is relatively low. Clearly a margin of error would need to be factored in, but they do suggest that relatively new employment land is required under the baseline and an amount closer to the lowest end of the ELR projections would be required. Conversely positive planning will be required to consider how non B Class employment growth will be accommodated.
- The EEA concluded that only 30% of employment growth would be in the traditional B Use Classes suggesting that a flexible approach to employment generating development needs to be adopted on our employment sites. In response to this it has been decided that flexible uses will be allowed on some employment sites including Eurokent subject to the application of the sequential test. This will inevitably lead to a loss of B Use Class floorspace in order to allow for this.
On certain sites, wider employment generating uses will be allowed in addition to traditional B1, B2 and B8 employment uses. The “flexible uses” include leisure, tourism and other town centre uses which, due to scale and format cannot be accommodated within town centres. They also include uses known as sui generis which do not fall into a category in the Use Classes Order. These include uses such as car showrooms and creches.
- The Eurokent appeal decision (APP/Z2260/A/14/2213265 allows up to 5.45 ha of employment land and up to 550 houses. The size of the site constrains the implementation of both of the “up to” figures and therefore it is unlikely that all of the 5.45 hectares will be delivered. Furthermore an early masterplan for the site indicated that 8 acres of the site would be dedicated to employment leaving 2.25 hectares of the permission unimplemented and not possible on the site in future.
- The majority of allocated land is at Manston Business Park. Approximately 42 hectares remains undeveloped although there have been a number of recent

developments following slow take up of the site. However, given deliverability problems and the history of slow land take up then it is considered that the delivery of site will progress beyond the 2031 horizon of the Local Plan. As the site is approximately half developed it would not represent positive planning to remove it from employment allocation and to do so would leave an undersupply of employment land especially given all of the justifications for maintaining an oversupply.

- Maintaining an oversupply facilitates the replacement of old stock. An element of vacancy on employment sites allows for the movement and expansion of firms as well as improvement. The ELR 2010 states that it is assumed that a vacancy rate of 10% allows this to occur successfully.
- The Town and Country Planning (General Permitted Development) (England) Order 2015 laws have changed putting the loss of B1(a) office use out of planning control.
- An element of sui generis uses takes up employment land. Between 2011 and 2016 there was 1237m² of sui generis uses developed. The Eurokent appeal decision (APP/Z2260/A/14/2213265) includes permission for 8,151sqm car showroom.
- The Regulation 18 Consultation into the Issues and Options of the Local Plan looked at whether we should include a level of contingency when allocating employment land. Respondents generally agreed and the sustainability appraisal concluded that including contingency in the supply scored well in terms of economic development.
- Maintaining a high level of employment land also reflects the potential workforce growth from the housing requirement in the plan.

De-allocated Sites

6.3 The NPPF says at paragraph 22 that planning policies should avoid the long term protection of sites allocated for employment use where there is no reasonable prospect of a site being used for that purpose. Land allocations should be regularly reviewed. Where there is no reasonable prospect of a site being used for the allocated employment use, applications for alternative uses of land or buildings should be treated on their merits having regard to market signals and the relative need for different land uses to support sustainable local communities.

6.4 Therefore it was appropriate to carry out a further review of employment sites based on evidence from the Economic and Employment Assessment 2012, and the Employment Land Review 2010.

6.5 The sites have been scored using the same methodology as the Employment land Review i.e. marketability, sustainability and deliverability. Strategic planning factors was removed as a category as there is no strategic plan in place with the abolition of the south east plan.

6.6 It was concluded that the following sites should no longer be protected for employment purposes as they were not considered to contribute positively to the employment land supply and in many cases were incompatible with surrounding uses.

• 144 Newington Road	1.12 ha
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• Magnet and Southern	0.29 ha
• Pysons Road (part)	1.14 ha
• Dane Valley (part)	2.39 ha
• Suffolk Road Factories	0.45 ha
• Jentex	2.09 ha
• Manston Road Industrial Estate (Flambeau Europlast)	4.34 ha
TOTAL	11.82 ha

6.7 The employment sites from the Thanet Local Plan 2006 were reviewed in light of the Economic and Employment assessment 2012 which looked at job growth forecasts to the end of the plan period (2031). The assessment looked at what sectors of the economy are likely to grow and what this means in terms of floorspace that will need to be planned for.

6.8 It was concluded that the following sites should no longer be allocated for employment purposes as they were not considered to contribute positively to the employment land strategy.

• Manston Road Industrial Estate	1.53 ha
• Thanet Reach (south)	3.19 ha
TOTAL	4.72 ha

6.9 A large number of sites were considered for retention and assessed using the scoring method. A small range of sites have been retained that include those with cheap start up small premises, those containing un-neighbourly uses and those that are full or near fully occupied. More information can be found at the next chapter Review and appraisal of existing sites/floorspace update

6.10 The remaining developable area of Eurokent is 20.5 hectares. The Draft Local Plan allocated it for 15ha but reflecting the appeal decision only 5.45ha ha is allocated. This means that 31.59 hectares have been deallocated from employment uses since the adopted Thanet Local Plan 2006 with many of the sites reallocated as housing sites.

Key Findings:

- There is strong justification in maintaining an employment land “oversupply”.
- 31.59 hectares have been deallocated from employment uses since the adopted Thanet Local Plan 2006 with many of the sites reallocated as housing sites.

APPENDIX 1 – Site Scoring

Site	Size	Market -ability	Comment	Score	Sustain -ability	Comment	Score	Deliver -ability	Comment	Score	Previ ous Total	Comment
Cromptons	2.26	5	This site has been recently developed with new good quality office buildings. The market for these types of premises has declined but they are above average in quality	4	5	The site is located in a sustainable location and access to the road network improved with Westwood road improvements including with widening of Poorhole Lane	5	5	Occupied by two well established businesses. Any intensification on the site would need mitigation on the Westwood junctions	4	20	13: Despite a change in market conditions this is a site in good condition occupied by successful well established businesses. It is unlikely that intensification will occur on the site
Haine Road	6.52	4	This site is well located, has a mix of buildings, functions well and has very few vacancies. Those units that are vacant are being actively marketed. Having said that there is a general downturn in the market.	3	5	The sustainability of this site has not changed since the original scoring exercise	5	5	A right hand turn land is proposed for the site as part of planned road improvements which would make the site more accessible.	5	19	13: Despite a change in market conditions this site is still an attractive and popular employment site
Manston Green	0.38	5	The site is located within the village confine of Manston and is well presented with good facilities. The site is occupied by small cottage industries and currently has no vacancies. The site is function well despite a downturn in the market.	4	4	The sustainability of this site has not changed since the original scoring exercise.	4	5	The site is well established and has a unique offer but intensification will not be deliverable due to highway constraints	4	19	12: The site remains successful despite a change in market conditions
Manston Road (N)	1.67	5	The site is occupied by an NHS medical centre but the remainder of the site has remained undeveloped. With the downturn in the market demand for this type of	3	5	The sustainability of this site is fairly good with access to facilities for staff and it has reasonably good road access.	4	4	Apart from the medical centre the site has remained vacant. Mitigation would be needed at the Stanner Court junction if the site were to be developed.	3	19	10: The site has remained vacant and given the downturn in the market is unlikely to be developed in the future

			land has declined considerably						Other allocated sites are available in the area.			
Pioneer	0.64	5	This site is well maintained, in good condition and well occupied by small businesses	4	4	The sustainability of this site has not changed since the original scoring exercise.	4	5	The site is not suitable for intensification due to constraints on the road network but caters well for small to medium enterprises.	4	19	12: The site remains successful despite change in market conditions
Fullers Yard	0.17	5	The site is in good condition and is an ideal site on the edge of the town centre for small businesses. At the time of visiting 5 of the units were vacant but there is a high turnover of this type of unit that serves small industry and the site has proved popular.	4	4	The sustainability of this site has not changed since the original scoring exercise	4	5	The site is not suitable for intensification due to constraints on the road network but caters well for small enterprises.	4	18	12: The site is proving successful despite a change in market conditions
Jentex	2.09	5	There is no longer a commercial demand for fuel oil storage and therefore the use of this site is redundant and the owner has expressed a wish to redevelop the site	1	4	The main road into Ramsgate has now bypassed the Jentex site and therefore it is a site in a traffic calmed village location with relatively poor access to the main highway network.	2	4	Although the site is in single ownership it has constraints in terms of contamination and is now unsuitable for routing of heavy goods vehicles	1	18	4: This site contains a redundant use and redevelopment is not considered viable
Laundry Road	3.68	5	The site is in a good location close to the strategic road network. There are a range of units with good parking and layout. At the time there were only 2 vacancies and the site contains several well established companies. Planning permission has been granted for a change of use to a haulage yard to facilitate	4	3	The sustainability of this site has improved as it is now accessed off the new dualled A256 and there are now food/drink and shopping facilities within walking distance. A full score of 5 is not possible as the site is not accessible by public transport such as bus and rail	4	5	This site is owned by Whites transport (we think) and is popular with well established businesses on site and there are no constraints such as highways and there is remaining developable land.	5	18	13: This is a large site in the rural area that has proved successful, is sustainable and has potential for future expansion.

			growth of White's transport									
Magnet and Southern	0.29	4	This is a single occupier site. It is in reasonable condition. The market downturn has significantly affected the marketability of sites such as these.	1	4	The sustainability of this site has not changed since the original scoring exercise	4	5	The site is located in a predominantly residential area and development of the site could be incompatible with the surrounding area and lorry routing is poor	4	18	9: This is a small single occupied site in a residential area and given the market downturn commercial redevelopment is unlikely
Manston Business Park	75.2	5	This site is the Districts largest employment site and is centrally located. There are a number of large occupiers. Currently there are 3 units being actively marketed and there are currently new units being built out	4	4	This site is located away from centres of population and facilities for staff but is well related to the primary road network and as this large site develops with a number of occupiers it is considered that staff facilities are likely to improve	4	4	The site is in a prime/accessible location which is compatible with business use and is therefore attractive to developers. Improvements to the road network makes the site more attractive. Some improvements to the spitfire junction may be required as development comes forward.	4	18	12: This is a strategic employment site in the District which is centrally located and is showing signs of development
Pysons Road	22.79	4	This is a large popular site with many different sections of varying quality. There are a few vacant units but there is active marketing on the site	3	4	The sustainability of this site has not changed since the original scoring exercise.	4	5	Parts of the site have attracted complaints to environmental health. Parts of the site need investment	4	18	11: This is a popular site with a healthy turnover of businesses that is showing resilience to the market downturn on the whole. Some parts of the site are in need of upgrading and some reinvestment is needed.
St Lawrence	0.19	4	This is a small site in a predominantly residential area. There are 5 small units that are all occupied. The	3	4	The sustainability of this site has not changed since the original scoring exercise	4	5	The site is located in a predominantly residential area and development/intensification of the site could be	4	18	12: This is a small site in a residential location next to a school. It is incompatible with surrounding uses, and given the downturn in the

			buildings are satisfactory but the access, turning and parking are poor. The downturn in the market will have an effect on the marketability of this site.						incompatible with the surrounding area and lorry routing is poor			market is unlikely to be redeveloped
Tivoli Road	2.45	5	This site is bounded by the railway line and residential properties. It is occupied by three large buildings which are in good repair. Access to the site and parking is poor. There has been a recent change of use allowed from storage and distribution to retail in one of the units. The downturn in the market may have an effect on the marketability of this site.	1	3	The sustainability of this site has not changed since the original scoring exercise	3	5	The site is in a residential location and has poor access through heavily parked up residential streets. It has lorry routing issues and is not suitable for large vehicle movements.	4	18	8: This site is in a constrained residential location. It is incompatible with surrounding uses and given the downturn in the market is unlikely to be redeveloped.
Westwood Ind Est	25.9	4	This site is a large site in Margate which is well established and has a varied mix of uses including retail. There are vacancies in some sections but they are being actively marketed. Some parts of the site are poor and in need of upgrading. The access and road networks to the site are good and there are few constraints to redevelopment	3	4	The sustainability of this site has not changed since the original scoring exercise	4	5	Redevelopment on a large site such as this is viable. It is a large accessible site within Margate's urban confines and attracts a range of uses of varying sizes.	4	18	11: This site is unconstrained in nature and is a popular vibrant employment site which could accommodate redevelopment.
140-144 Newington Road	1.12	4	This is a single occupier site located in a predominantly residential location.	1	4	The sustainability of this site has not changed since the original scoring exercise	4	5	The site is in a residential location and has poor access through heavily parked up	4	17	9: The site is located in a predominantly residential area and commercial redevelopment of the site

			Lorry routing to the site is poor. At the time of this review Piper Windows had gone into receivership and the site is vacant. The downturn in the market is likely to have an effect on the marketability of this site						residential streets. It has lorry routing issues and is not suitable for large vehicle movements.			could be incompatible with the surrounding area and lorry routing is poor
All Saints	3.16	4	This site is bounded by the railway line and residential properties. The site is in poor condition including buildings and external area. There is a large area of vacant land and poor use of the site. Given the market downturn it is unlikely that this will be developed.	1	5	The sustainability of this site has not changed since the original scoring exercise	5	4	The site is in a residential location and has poor access through heavily parked up residential streets. It has lorry routing issues and is not suitable for large vehicle movements. There have been complaints of noise and paint spraying to Environmental Health from nearby residents.	3	17	9: This site is in a constrained residential location. It is incompatible with surrounding uses and given the downturn in the market is unlikely to be redeveloped.
Eurokent	38.6	5	This is a large site in Ramsgate which is largely vacant. The Northern part of the site contains leisure uses and the southern part of the site has been developed for office and industrial units developed by SEEDA. The possibility of housing on the site is being investigated. The units have been actively marketed and most of them have been taken up. It is a well presented site with good access and centrally located.	3	5	The sustainability of this site has not changed since the original scoring exercise	5	3	The site is centrally located in the District with good road access although some mitigation may be required. The site has been the subject of a recent planning application for mixed use development.	3	16	11: This site has development potential, it is centrally located with good road access and is close to the amenities at Westwood.

Hedgend	2.46	4	This popular site is in a rural location but is well linked by road to the Thanet Way. Access and lorry routing is good. There is a planning permission for 3 buildings housing 12 general industrial units. The market downturn does not seem to have affected the take up of units on this site.	3	3	The sustainability of this site has not changed since the original scoring exercise	3	4	The site is well located with good access to the road network for lorries. The site is popular with a remaining developable area with planning permission for 12 units.	4	16	10: This is a well located popular site with scope for further development.
Northdown	0.89	4	This is a single industrial building which is split into 11 units. The site is popular with all units occupied. The site appears unaffected by the downturn in the market but there is a planning permission for an office building.	3	3	The sustainability of this site has not changed since the original scoring exercise	3	4	The site has fairly poor access but is proving deliverable as redevelopment is occurring.	4	16	10: This is a popular site that is proving resilient to the economic downturn despite highway constraints
Princes Road	0.98	3	This site is in very poor condition within a predominantly residential area. The contains a number of small units and is well occupied but given the downturn in the market is less attractive and marketable	2	4	The sustainability of this site has not changed since the original scoring exercise	4	4	This site has poor lorry routing and is in a residential area complete redevelopment is needed	3	16	9: This site is in a constrained residential location. It is incompatible with surrounding uses and given the downturn in the market is unlikely to be redeveloped.
Whitehall Road	0.95	4	This site is located in a residential area. The building and site presentation are satisfactory. The site contains a number of small and medium sized units but given the downturn in the market	3	4	The sustainability of this site has not changed since the original scoring exercise	4	4	This site has poor lorry routing and is incompatible with the surrounding uses	3	16	10: This site is in a constrained residential location. It is incompatible with surrounding uses although does provide inexpensive premises for a number of small businesses.

			other sites are more attractive. At the time of visiting there was one vacant unit									
Manston Road (S)	6.8	2	The Flambeau site is poor and in need of redevelopment	1	5	The sustainability of this site has not changed since the original scoring exercise	4	4	The site has reasonably good access but mitigation may be required at Stannar Court. Complete redevelopment may be unviable	3	15	8: This poor quality site is in need of complete redevelopment.
Thanet Reach	9.74	3	This site is well presented and currently contains some education uses and the Kent Innovation centre. Access to the site and parking are good. Large parts of the site remain undeveloped.	2	5	The sustainability of this site has not changed since the original scoring exercise	5	4	The site is attractive and deliverable but uses may be limited by the residential nature of the area.	4	15	11: The site is attractive and ready for development but uses may be constrained.
Factories, Suffolk Av	0.45	3	This is a small site in a residential area. There are 2 businesses operating from the site in poor unsuitable buildings. Access to the site and parking are very poor.	1	3	The sustainability of this site has not changed since the original scoring exercise	3	5	Redevelopment of this site for employment site is unsuitable and unrealistic. Lorry routing is particularly poor. Employment use is incompatible with the surrounding area and noise abatement notices have been served	2	14	6: The site is inadequate for employment use and is incompatible with surrounding uses. The owner has expressed a wish to locate to a different employment site in Thanet
Dane Valley (developed)	5.04	4	This is a large very popular site occupied by a range of businesses. Parts of the site vary in quality and access and parking is relatively poor. 5 spec units have recently been developed named copper leaf business park.	3	3	The sustainability of this site has not changed since the original scoring exercise	3	3	Lorry routing and access are poor and the area is heavily parked up, Despite this the site is popular with regular enquiries for new uses.	3	13	9: This site functions well despite having access and parking difficulties. Due to its popularity it may benefit from some reinvestment.

Dane Valley (undeveloped)	3.49	3	The undeveloped part of the site is constrained	1	3	The sustainability of this site has not changed since the original scoring exercise	3	2	Lorry routing and access are poor so development of the undeveloped part of the site is unlikely	2	11	6: The remainder of the site is unsuitable for development and this allows for reinvestment in parts of the developed site that need it.
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APPENDIX 2 – Site Submissions

A number of site submissions have been received relating to employment land and these are outlined in the table below along with recommendations in the light of this report:

Site	Request	Recommendation/ Comment
Manston Business Park (four sections of)	<p>A wider variety of uses should be allowed on site such as crèches to make the site more attractive</p> <p>[Employment generating uses within existing local plan designation but also other small scale uses which serve the employment use of the site]</p>	Manston Business Park is Thanet's flagship employment site and should not be compromised by piecemeal development and uses that are not traditional B use employment. Ancillary development would be allowed to support the main use. Provision has been made for flexibility of uses on more appropriate sites
East Northdown Farm	<p>The site owner requests that the site be allocated for employment and leisure uses</p> <p>[Submission indicates potential residential or mixed use including retail, nursery/farm shop/horticulture/agriculture/class B1/leisure and retail.]</p>	This site is already in employment use and contains a number of small units. A number of similar sites which cater for SMEs in the District are protected for employment use and this is not considered a necessary addition. Road access to the site is also poor. Provision for leisure uses has been made within Thanet's town centres and on specific sites
Manston Riding Centre, Alland Grange Lane, Manston	The site owner has requested leisure and tourism and potentially light industrial employment/mixed	Adequate land is available on within the existing allocation on Manston Business Park. Provision for leisure uses has been made within Thanet's town centres and on specific sites
Ramsgate Garden Centre, Montefiore Avenue, Ramsgate	The site owner requests residential development or alternative uses such as retail, commercial employment, leisure or tourism e.g hotel	Sufficient land and varied sites are available on existing sites in Ramsgate to meet the identified need to the end of the plan period. The area is predominantly

		residential and employment uses may be incompatible with surrounding uses
Former railway track, Nash Road, Margate	Residential and/or employment/employees' housing	Employment uses are already provided in this area at Westwood Industrial Estate
Jentex Site, Canterbury Road west, Ramsgate	Residential/possible commercial or any suggested alternative	The site is currently allocated for employment use. The site now scores worse in terms of accessibility as the A256 road improvements have bypassed the site and has limited access to the primary road network
Jewson's site, Tivoli Brooks Industrial Estate, Margate	Mixed development including residential and employment uses	The site is already allocated for employment uses and the recommendation in this report is to continue this.
Land south of Manston Road, Ramsgate	Infrastructure-led mixed use including residential and employment land	The owner is now seeking purely residential allocation. The scoring exercise in this report concludes that the site is not necessary to the portfolio of sites that support the economic strategy for the area.
Land west of Cliff View Road, Cliffsend	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land West of Greenhill Gardens, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land west of prospect rd, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land south of Monkton rd, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land southeast of Mount Pleasant roundabout, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at

		Laundry Road Industrial Estate
Land east of laundry road, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land east of Wayborough Hill, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land east of Way Hill, Minster	Housing, employment, airfield and road related development	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land south of A253, Minster	Business	Employment uses are already provided for adequately in this area at Laundry Road Industrial Estate
Land at Ramsgate Road, Margate IPA Smith R25-051	Either residential or mixed (residential with employment/commercial)	Employment uses are already provided in this area at Westwood Industrial Estate
Land at manor Road, St. Nicholas	Either primarily residential including some community facilities or mixed use including residential, employment and community facilities	Employment uses are already provided for adequately in this area at Hedge End Industrial Estate
Land west of Updown House, Ramsgate Road, Margate R25-57	Either residential with public open space or a mixed development including residential, commercial/employment, retail and a quality hotel.	Employment uses are already provided in this area at Westwood Industrial Estate
Land North of Manston Green Farm, Manston R25-059	Either all residential incorporating some community facilities and or employment (small business uses) or a business hotel.	Employment uses are already provided for adequately in this area at Manston Green
Land fronting (north side of) Westwood Road, Broadstairs R25-063	Either primarily residential but including some community facilities or a mixed development i.e. residential, commercial and leisure	Employment uses are already provided in this area at Cromptons site.
Land at Minster Road, Acol (northern part) R25-076-1&2	Extension to existing business park	Adequate land is available on within the existing allocation on Manston Business Park
Land at Richborough Power Station.	B1/B2/B3 employment and uses identified within 2006 Thanet Local Plan under Policy EP14	This area is being considered in the Kent Minerals and Waste

	(Renewable energy)	Local Plan for Waste to Energy uses. It is currently allocated in the Kent waste Local Plan for Waste Uses. Use of this Land for employment uses is surplus to requirements
Land at Manston Business Park (east of existing BP) 2018 submission Phase 1,2 and 4, Land at Manston Business Park, Manston Road, Manston, Ramsgate	Employment/Commercial Residential and commercial	Adequate land is available on within the existing allocation on Manston Business Park
Land to east of Grupo Antolin, Eurokent Business Park	Mixed use business	This area has been developed for retail.
Land at Dane Valley Road/Northdown Hill, Broadstairs R25-104	Employment	Copper Leaf extension has been built
Land at Haine Road & Spratling Street R25-119	Residential or mixed leisure/residential	Adequate land is available on within the existing allocation on Haine Road Industrial Estate and at Westwood Cross
Land at Nash & Haine Roads (Gleesons site), Westwood R25-133	Residential (inc element of commercial/community)	Adequate land is available on within the existing allocation on Eurokent and at Westwood Cross
Arlington House & 1-50 Arlington Sq, Margate R25-150	Mixed use for retail, superstore, hotel and refurbishment of existing residential	Site has extant permission for retail
Dane Valley Industrial Estate Extension EKC	Employment uses – extension to the Industrial Estate	Site lies in the green wedge
Manston Airport site GVA	Mixed Use Employment led Development	Awaiting outcome of DCO process