

# CRAWLEY Manor Royal

Final Report

May 2008



**BDP.**

**regeneris**





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# INTRODUCTION







# INTRODUCTION

## Introduction

In May 2007, Regeneris Consulting Ltd and Building Design Partnership (BDP) were appointed jointly to provide an evidence base to inform the development of a vision and strategy for the area to be taken forward by CBC and partners. The overall objective of this work was to develop an evidence base, inform ideas about a new vision for the area and to provide an accompanying set of strategic actions that will help ensure Manor Royal performs to its full potential as a key business hub in the South East.

Manor Royal is a business location of huge significance. Situated adjacent to Gatwick airport, equidistant between central London and the South Coast, Manor Royal is in an important pivotal position. This positioning has certainly been taken advantage of effectively in the past to generate ongoing business success. Over recent years, however, there have been concerns on the part of both public and private partners that the area has declined somewhat as a business hub and has failed to map out a distinct, strategic direction for itself. This is thought to have had a negative impact on the overall competitiveness of the area.

Manor Royal has a substantial economic impact on the Crawley area, however its economic influence extends well beyond this geography. At sub-regional level and also at regional level, Manor Royal plays a vital role in facilitating the ongoing economic development of the South East region. It is imperative, therefore, that Manor Royal exploits its potential fully as a business location and reinforces its national and global reach.

In developing an evidence base to inform the development of a new vision and strategy for the Manor Royal area, there are clearly two dimensions to consider; the physical and the economic. As such, the work of the study team was divided into two key component physical and economic parts but with significant strategic crossover and linkage between the two.

On the physical side, key work elements included:

- Physical baseline audit and assessment;
- Review of planning and related policy
- Site assessment of opportunities and constraints;
- Development of principles and options.

The economic development analysis focused on:

- In-depth socio-economic baseline analysis;
- Extensive consultation with local partners, regional and sub-regional interests, as well as employers based in and around Manor Royal;
- Synthesis of data and information into a set of key economic priorities.

The study process also involved group and seminar discussion with Crawley Borough Council members, Crawley Town Centre Partnership and the Crawley Local Economy

Action Group. In addition, a workshop event was held with representation from the public and private sectors locally, sub-regionally and regionally, who were brought together to discuss and refine the emerging options and priorities.

The work culminated in the development of an evidence base to inform the new vision for Manor Royal outlining physical and economic elements in detail. Specific areas for action were identified, with guidance on the most appropriate means of implementation.

The remainder of this document sets out the baseline assessment for Manor Royal in the context of the wider Crawley area, the economic and physical vision for Manor Royal and key action areas and mechanisms for implementation.

## Study Area

The core 'Manor Royal' study area is defined as the land shown in figure 1.1 outlined in red. To ensure that a holistic approach to the study is undertaken, adjoining industrial/business uses/areas have been included within the remit of the wider study dialogue. As such, the areas identified as County Oak (as defined by the blue outline), and the 'Manor Royal Fringe' (as defined by the green outline) have both been included within this study.

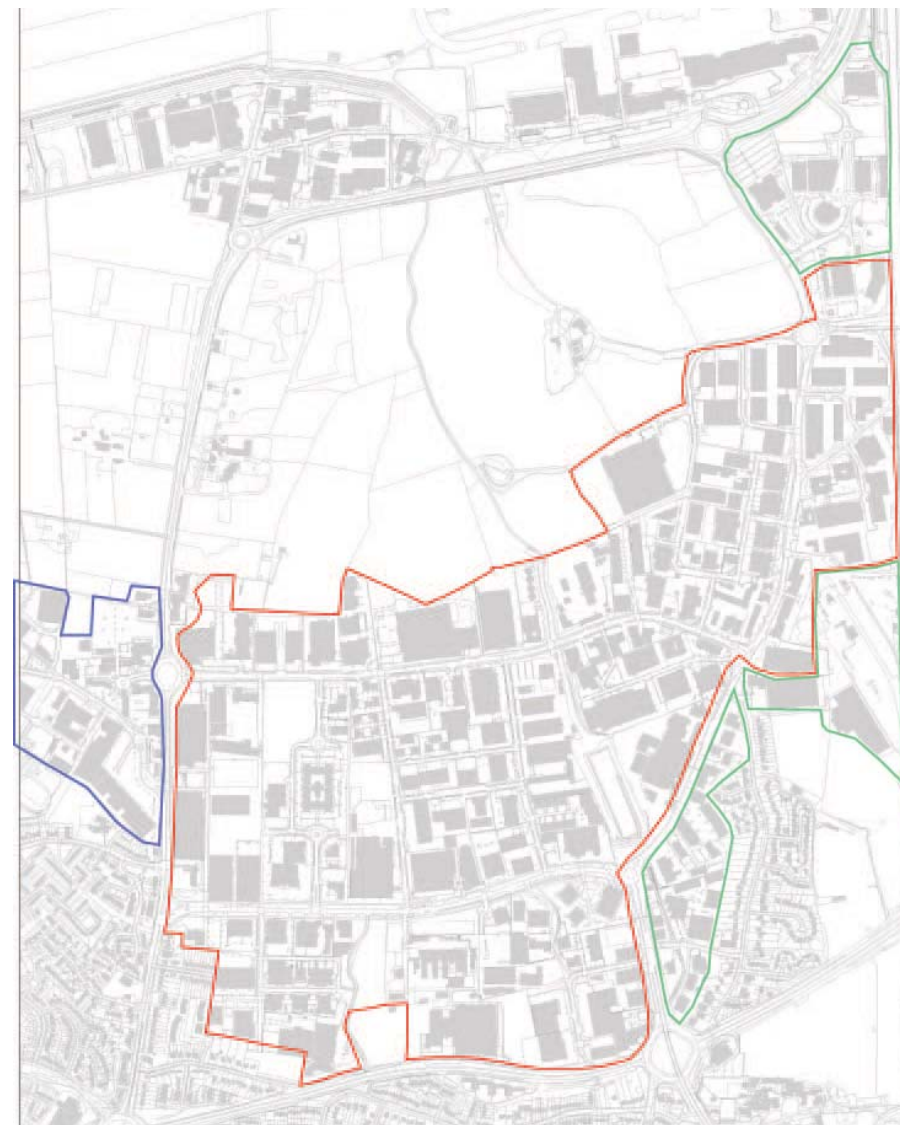


Figure 1.1: Manor Royal site plan showing the Manor Royal main employment area in red, County Oak in blue, and the Manor Royal Fringe areas in green.





# SECTION ONE:

## BASELINE PHYSICAL AUDIT & ASSESSMENT





# BACKGROUND AND CONTEXT

## Site Context



Figure 1.2: Gatwick Diamond as per the Surrey and West Sussex Economic Partnerships



Figure 1.3: Gatwick Sub-Region as per the South East Plan

### Regional Context

Crawley is located in the centre of the South East Region, strategically located between the southern fringe of London and the cities on the London cusp; notably Redhill and Reigate, and the south coast; Brighton being the largest coastal centre to the south. The largest settlements surrounding Crawley are Horsham to the south-west, and East Grinstead and Haywards Heath to the north-east and south-east respectively.

It is important to note the extent of the Gatwick Sub-Region (as defined in the emerging South East Plan, 2006) as compared to the Gatwick Diamond, and the variances between their administrative and policy boundaries. The Gatwick Diamond is a business led, joint venture in partnership with the public sector, including the West Sussex and Surrey Economic Partnerships.

The boundaries share a similar coverage east-west, however the most notable difference is in the extent of north-south inclusion. The Gatwick Diamond extends northwards to include Redhill and continues up to the London fringe, and southwards, to the fringe of Brighton. Conversely, the Gatwick Sub-Regional boundary extends only as far north as Reigate and Banstead, and south to Hurstpierpoint. Both include Crawley and Manor Royal.

### Local Context

Manor Royal is located in the north of Crawley Borough, and sits directly below Gatwick Airport; the largest and only international airport within the South East Region (Heathrow is within London to the north of Manor Royal). The A23 runs to the west of the site, and Gatwick Road and the rail way line to the east. The A2011 borders the site along the southern boundary, though there is no vehicle access to the core of Manor Royal from this road.

The main east-west routes running through the site are Manor Royal and Fleming Way. As can be seen from figure 1.5, Manor Royal (red shading) is bounded to the north by the Strategic Gap (green shading), which provides space between the southern boundary of Gatwick Airport (yellow shading), and the northern boundary of Manor Royal. A further area of open space borders the area to the east, beyond the railway line (orange shading), as well as to the north-west beyond County Oak. The site is bounded on its southern and south-western boundary by residential development.



Figure 1.4: Manor Royal Location in the South East of England



Figure 1.5: Manor Royal Context

physical & planning  
baseline

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# Policy Review

## POLICY REVIEW

This policy review section covers both the current and emerging policy arena and spheres of influence that are setting the planning and economic agenda on a national, regional and local level. This includes both strategic policies and specific and targeted local policies that are relevant to Manor Royal.

### Planning Policy Statement 1: Delivering Sustainable Development (2005)

Key themes of current national policy of relevance to this Chapter are mainly summarised in Planning Policy Statement 1 (PPS1). This document emphasises the importance of sustainable development which it defines as:

- Social cohesion and inclusion
- Protection and enhancement of the environment
- Prudent use of natural resources
- Strong and stable economic development

PPS 1 goes on to say that that planning authorities should actively promote and facilitate good quality development, and sets a number of objectives for sustainable development that planning policies should seek to achieve. These include:

- Promoting urban regeneration, communities, and local and wider economies
- Bringing forward sufficient land for development to meet needs for housing, industry, retail and commerce, providing for growth and consumer choice, taking into account accessibility and sustainable transport needs
- Giving high priority to ensuring access for all to jobs, and other facilities including shops and leisure
- Focusing developments in existing centres if they are likely to attract large numbers of people
- Promoting efficient use of land through higher density, mixed use development on previously developed land and,
- Reducing the need to travel and encouraging public transport provision.

### Planning Policy Guidance 4: Industrial, commercial development and small firms

PPG4 seeks to ensure that development plan policies balance the locational needs of businesses with wider objectives, primarily looking at the transport and environmental implications of development proposals. This is critical in assessing the responsibility of businesses in sustainable development and the responsible use of man-made and natural resources.

This national policy directs LPA's to look to the redevelopment of previously used land and to return it to productive uses. This approach must be inherently flexible to account for changes in demands, and trends in employment land use, and pay particular attention to the infrastructure needs of business uses. Local policies should provide choice, flexibility and competition for business uses which ultimately stimulates economic activity. PPG4 also calls for the promotion of small and medium sized firms recognising their role in continued sustainable economic development.

### Regional Planning Guidance for the South East (RPG9) (2001)

One of the four key elements of the vision for the South East is the "maintenance of high and stable levels of economic growth and employment". RPG9 has an underlying theme of sustainable development which applies to all the components of the guidance. The guidance looks to promote development in existing urban centres or previously developed land, and seeks to improve the offer of these sites through making them more accessible with a higher quality of public realm and able to attract investment.

The guidance also seeks to capitalise on the economic benefits of the regions proximity to London, and its connections to Europe, and spread the economic benefit of this throughout the region. The location of economic generators should pay heed to principles of sustainability and reducing trip generation especially longer journeys by private motor cars. The guidance also recognises the interrelationship between the quality of the physical environment and the buoyancy of the economy.

The policy for the Western Area seeks to enhance the economy through focusing on its economic strengths. This focuses on the high skill levels and knowledge base, whilst ensuring economic growth is in a sustainable manner, taking into account the pressure on limited labour and land resources. Wherever possible the intensification of use on existing sites should be encouraged. Focusing this high end value added employment in clusters, where economically and environmentally acceptable, is encouraged, while small and medium sized businesses are fostered to diversify the market and reduce dependencies and thus risk.

The guidance suggests that development which does not fit with this highly value added cluster of businesses should be resisted, while LPA's should use S.106 agreements to fund necessary infrastructure development.

RPG9 also specifically links human resource development as a critical driver for continued and sustainable economic success, and that a key aim of the policy is to improve job opportunities in the labour market. The guidance also sets the timeframe for economic development focused on a long-term and holistic approach. In the Western Policy Area,

the guidance requires the development of strategies for areas where congestion, labour or land shortages are constraining economic growth. Focal points where this pressure is greatest should be identified and specific policies developed to tackle local problems.

### A Vision for Crawley 2003 to 2020

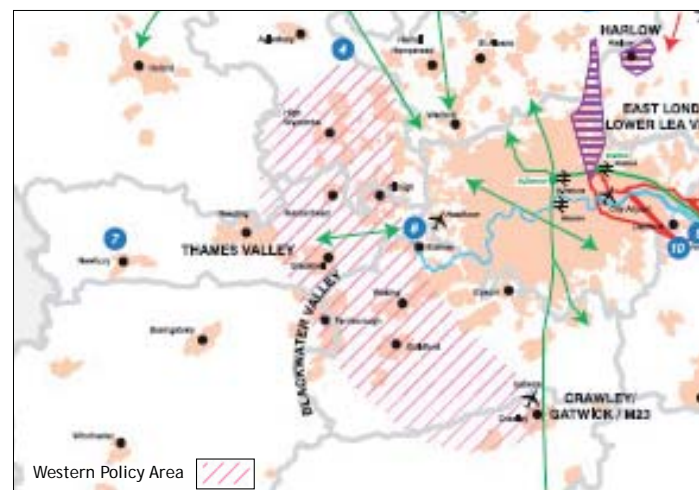
The Community Plan has a vision which aims to "develop the skills essential to a vibrant and diverse local economy" and to promote "economic success" in an attractive environment. The local economy is identified as one of the six main priorities, and looks towards skills and transport infrastructure to encourage diversity in local, regional and national businesses within the borough. Reducing the core dependence on businesses associated with Gatwick Airport (and its related employers), and improving the skills base to offer workers access to highly skilled work are key priorities. The desired outcome is one where Crawley moves from a sub-regional to regional centre.

The local environment is another of the six main priorities, recognising the value of the green spaces and attractive and well maintained streets and spaces to the vitality of Crawley. Environmental concerns encompass traffic and parking concerns, including sustainable transportation, pollution, and the maintenance of a clean, rubbish and vandalism free borough.

### A clear vision for the South East; The South East Plan, Core Document March 2006, Draft Plan for submission to Government

The draft Regional Spatial Strategy (RSS) for the South East seeks to find a sustainable balance between economic prosperity and the wider vision for the South East. The plan recognises that development is limited by the ability of existing and future infrastructure to meet the area's needs, and the needs of new development, as stated in policy GAT2 and GAT5.

The preferred spatial strategy in the draft RSS has continued economic growth which minimises additional pressures on land and labour resources, particularly in the most heavily constrained parts of the region. The draft RSS also contains a sub-regional strategy for the Gatwick Area, with policy GAT1 recognising the opportunities present to capitalise on the sub-region's location in relation to Gatwick Airport, London and Brighton, and the Gatwick Diamond concept, while diversifying the economy to reduce direct reliance on the airport.



Western Policy Area from RPG9



Within this sub-region, the focus of policy GAT4 is on high value-added economic growth, and development that contributes to the improvement in the skills and flexibility of the local workforce. Specifically the plan identifies a need for enhanced learning opportunities, employment floorspace in association with the major developments and strategic locations in Crawley, high quality sites for startup and micro-businesses to support the growth of existing local businesses and the attraction of high value-added inward investment, and the retention of existing businesses. Notably this plan seeks to retain the function of Gatwick Airport as a business airport (policy GAT4), while policy GAT1 reiterates the importance of the strategic gap and maintaining the character of towns in the sub-region.

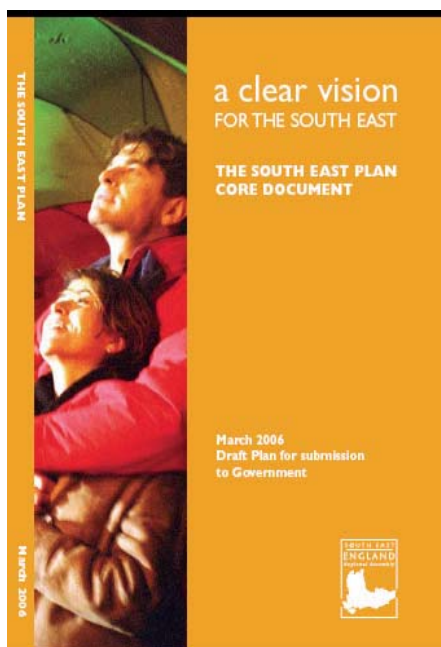
The plan also acknowledges the value and role that partnerships have in wider regeneration; sighting relationship between Local authorities, local strategic and economic partnerships, SEEDA and the business community as being value adding to this process. The plan also promotes the retention of strategic gaps in restricting coalescence.

In identifying and safeguarding employment sites, the strategy requires LPA's to seek locations that are accessible to the existing and proposed labour supply, preferably on urban brownfield sites, or which increase the intensity of the use, and which are highly accessible and promote a mix of uses including non-employment where appropriate. The strategy also recognises that land use measures alone do not offer a holistic solution to regeneration, and employees and infrastructure, the quality of the environment, and sustainability are critical drivers.

The creation of economic value is a core part of the vision for the Gatwick Sub-region. Economic policy in the strategy looks to the Gatwick Diamond as a key partnership initiative to stimulate economic development. The policies focus on value-added industries and businesses, and a highly skilled and flexible workforce. Reiterating the need to diversify, policies also promote measures to develop small and medium business and reduce the reliance on Gatwick Airport as the principle economic generator. These policies also seek to tie the increase in skills base to higher and further education establishments.



West Sussex Structure Plan



Draft South East Plan

### Presentation to the South East England Regional Assembly - Paper 2 The draft South East Plan: further material for the South East England Regional Assembly regarding the Gatwick Area Sub-Region Presented by West Sussex County Council on behalf of the Principal Authorities December, 2005

This paper looks at the draft South East Plan and presents further work regarding the proposed plans in the Gatwick Sub-regional Strategies. Primarily, the paper raises the issue that the needs of local residents and businesses must be the priority within the identified growth strategy.

Growth must be accommodated in the most sustainable way, namely through brownfield developments and by protecting the high quality environment which characterises the area. This requires the identification of clear priorities for the Sub-Region. It also means recognising and acting on the fundamental importance of new development only being allowed to proceed in tandem with the provision of the infrastructure and services needed to support it.

The paper also seeks to ensure that spatial plan for growth is holistic, and incorporates an approach that goes beyond simply allocating enough land to meet calculated employment floorspace requirements, and that important aspects of accessibility, choice, location and quality are key considerations in the provision of employment locations.

Furthermore, in determining employment land allocations, LPA's need to provide for a full range of economic development requirements to ensure that an appropriate mix of business sites will be readily available to retain, allow growth and diversification (including entry of small businesses) in both existing and prospective businesses. The paper also recognises that it is also important that employment floorspace is provided in association with strategic development within the Sub-Region.

The paper seeks to encourage the sort of economic growth that is consistent with the Sub-Region's needs balancing the desire for high value-added investment with enhancing the skills and flexibility of the local workforce to aid social inclusion. Termed "smart" growth, it is envisaged that this will minimise pressure on land and labour resources in the Sub-Region. The paper also identifies one of the key challenges in this Sub-Region is to reconcile the competing demands for the limited space available. This also relates to the matched provision of infrastructure and services with new development, either in advance of, or in parallel time frames, to the proposed growth including social infrastructure.

In relation to the form and character of development the

paper states: "All new development should be well thought out, planned, and laid out so that it integrates with existing communities, respects the local character and the character of the Sub-Region as a whole, and makes a positive contribution to quality of life". This recognises the importance of the strategic gaps and character as valued assets of the Sub-Region.

### West Sussex Structure Plan 2001-2016 (2005)

This structure plan promotes Crawley / Gatwick as a key economic location within the Western Policy Region. Economic growth in this area needs to manage resultant pressure on land and labour, whilst having a regional influence on the economic position of the whole of West Sussex. Where possible, the focus should be specifically on secondary impacts on Brighton and other coastal towns, a strategic link that is further promoted with the prioritisation of an improving transportation and growth corridor between Gatwick/Crawley and Brighton. In relation to transportation, the priority is clearly on improved public transport, and a better environment for pedestrian and cyclists.

The plan seeks also to safeguard land directly south of Gatwick Airport for potential airport expansion, and recognises the indirect impact this may have on land uses in the area as a result of height restrictions and aircraft noise. This area comprises the strategic gap identified at a local level by the Borough Council, and which is prioritised for safeguarding.

The plan reiterates national policy in promoting the use of 'brownfield' sites, and prioritises infilling, redevelopment and the conversion of existing buildings to meet demand for land (projected to be 280,000 sqm of employment land by 2016 in Crawley). It also seeks to secure higher density development, more efficient use of land, which may be secured through minimum densities in identified areas.

Specific mention is made of the need to facilitate and promote small and medium businesses, and start-ups. Within this framework, the maintenance and enhancement of the quality of the urban environment is a critical consideration.

Critically the plan recognises the need for working partnerships with key organisations, to cover wider sustainable economic regeneration strategies. The plan seeks to create mixed use communities, where the infrastructure, facilities and services required to serve an area are provided in conjunction with new development.

The plan specifically requires LPA's to assess the strengths and weaknesses of the economy, and assess the need for economic growth against the implications for land release to employment uses and the associated pressure for land

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and labour resources. This process will determine the current and future employment requirements, and the wider implications of this growth.

### Crawley Borough Local Development Framework Core Strategy (Adopted November 2007)

The Core Strategy identifies key local economic objectives and principles which focus on; quantity, size and type of employment space; skills shortages; diversifying economic base to minimise dependency on Gatwick Airport; providing necessary infrastructure; to maintain and enhance the Main Employment Areas and release land where necessary; encouraging redevelopment and intensification of existing employment sites.

Specifically policy E1 seeks to provide an additional 280,000 sqm of employment floorspace by 2016, and work within the West Sussex County Council to manage the additional land required under the emerging South East Plan (this figure is deemed indicative rather than a prescribed target of ceiling). Policy E2 seeks to control the development, redevelopment and intensification of employment sites to a number of main sites, including the existing Manor Royal Employment Area, the North of Manor Royal Employment Opportunity Areas, and other highly accessible locations.

These developments should be focused on firms providing high value goods and services including high and medium high technology, knowledge based firms, financial services, prestige developments, and the growth and modernisation needs of existing local firms. Skills, flexibility, variety in premises, increasing employment opportunities, providing support facilities, and balancing employment with housing need are critical factors in this process.

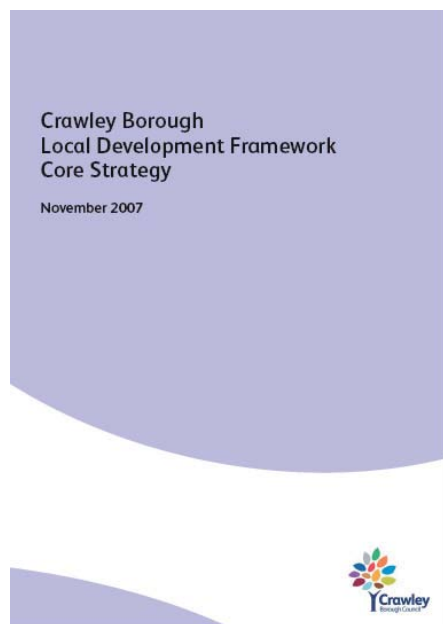
Policy E3 aims to protect all employment sites, particularly within Main Employment Areas from pressure from other land uses. Employment land may be released for other uses if it is deemed appropriate, if the site is no longer suitable for employment uses, or if the loss would result in significant regeneration, or intensification and upgrade in the employment use on site. This policy recognises the finite supply of land within the Borough, and the need to balance all the land use requirements of Crawley.

Policy E4 seeks to provide employment floorspace in suitable locations (within or external to the Main Employment Areas) for smaller employment uses to promote diversification and new business start up. This recognises the needs of the Borough, the short falls of a number of the larger employment areas, and in relation to Manor Royal, the reliance on Gatwick as a source of economic stability.

Policy MC1 is specific to Manor Royal / County Oak and seeks redevelopment and intensification which provide high quality employment space and diverse and complementary

uses and facilities whilst improving the environmental and design quality, making efficient use of land with appropriate access and sustainable transport. The overall objectives for Manor Royal / County Oak is to promote economic success (with regional significance) through intensification of, and redevelopment to provide high quality and diverse business uses, the efficient use of land, and to safeguard for the potential expansion of Gatwick Airport, and minimise the impact on the countryside, Strategic Gap and landscape.

In design terms, policy EN4 and EN5 seek to incorporate green spaces into new developments, paying particular attention to greening the edges of schemes of a neighbourhood scale, and provide green spaces and corridors within. These policies also seek a high quality of urban, landscape and architectural design and materials, which are based on an understanding of the context, significance and distinctiveness of the context, site, and surrounds.



Crawley Borough Council LDF Core Strategy

# SITE AUDIT & ASSESSMENT

## Photo-Analysis

### USES



### LOCAL RETAIL



1. Clarity is needed as to the role and relationship between wholesale / large retail warehouses and the primary employment uses in Manor Royal.
2. The adjoining residential uses restrict the physical expansion of Manor Royal
3. There are few local amenities and ancillary/ complementary retail uses, although some sites have in-house services/canteens.
4. Clarity is needed as to the role and relationship between car showrooms and the primary employment uses in Manor Royal.
5. There is a mix of offices / head-quarter style uses in Manor Royal. There is a mix of traditional industrial / manufacturing uses in Manor Royal.
6. There is a mix of traditional industrial / manufacturing uses in Manor Royal

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### USES



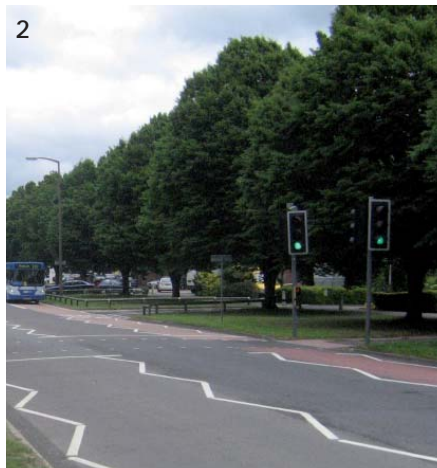


## PHOTO-ANALYSIS

The following section comprises a photo-analysis of Manor Royal conducted during the first half of 2007. The exercise aimed to highlight the current issues facing Manor Royal, and to demonstrate the strengths and weaknesses of the study area as it currently stands. The themes developed through this work informed the development and assessment of opportunities and constraints, and led to the creation of a number of issues and options which feature in the following sections.

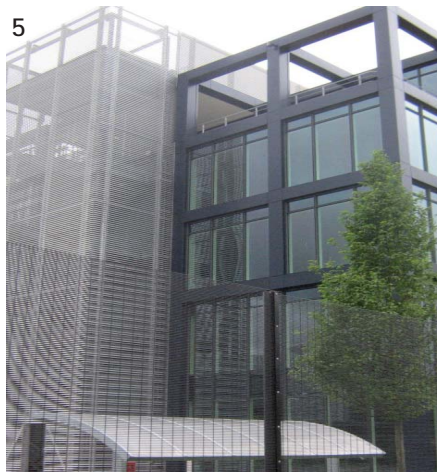


## ECOLOGY



## ARCHITECTURE

1. There are some areas with poor cycle and pedestrian infrastructure (particularly on the western side), and some routes are disjointed and poorly maintained.
2. Manor Royal is an attractive tree lined boulevard which is well landscaped.
3. Crawters Brook is a green link of ecological value but is relatively inaccessible and not regularly used.
4. There are a number of poor quality older premises.
5. There are also a number of new contemporary developments which have high quality specifications, and good urban design and architecture.
6. There is an enhanced role for sustainable transport modes and Travel Plans which should be integrated into Manor Royal and all future developments



## SUSTAINABLE TRANSPORT



## LANDMARKS



## HEIGHTS



## PARKING



1. There are some key landmark buildings which are of high quality and well designed, often located at key gateways
2. Building heights and densities are higher for offices, and lower for traditional industrial uses, although higher buildings are appearing at the gateways and along the main access ways
3. There is a perception of a lack of car parking, but many premises have ample space whilst other areas are at capacity
4. There are traffic and access issues to, and through Manor Royal, as well as larger roads being a physical barrier to expansion and movement
5. Conflict occurs between transport users/modes on some streets and junctions
6. The public transport service is good (including Fastway), however the inter-modal connectivity could be improved, although there are issues regarding the level, coverage and use of bus and rail services for employees with Manor Royal. Perceptions from the business community in Manor Royal regarding the quality of the service provision are mixed.

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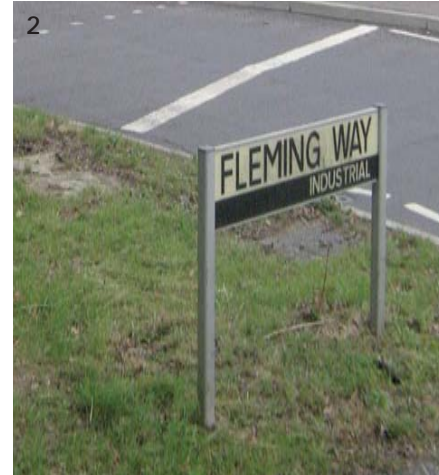
## TRANSPORT &amp; ACCESS





## SIGNAGE

1. There is inconsistent signage and naming of the Manor Royal location, and no overall branding
2. Street signs are poorly maintained, unattractive and badly sighted, lowering the image of Manor Royal and making wayfinding difficult
3. There is no consistent identity, sense of place or 'brand' through the signage currently on site, especially at key gateways
4. Some premises lack attractive and active frontages and have work functions, servicing and poor quality edges and landscape facing public spaces which detract from the overall quality of Manor Royal
5. The landscape quality of the key gateways into Manor Royal is poor, portraying a negative image and a poor sense of arrival
6. Some premises have attractive urban environment with good landscaping and well designed frontages



## URBAN DESIGN



## LANDSCAPE



## Signage & Gateways

Figure 1.11 also shows the key gateways in relation to the major transport routes and modes of public transport. With reference to figure 1.7 (building heights), and figure 1.8 (building age and quality), it is evident that taller, newer and higher quality buildings are appearing around these key gateways. This may reflect their location at points of greatest visibility, land value, accessibility and so forth.

The transport environment at these gateways is not of a particularly high quality, with busy and large traffic intersections with large roundabouts dominating the entrance points. This is true of all the major junctions (Manor Royal/Fleming Way, Fleming Way/Gatwick Road, Manor Royal/Gatwick Road, Gatwick Road/Crawley Avenue and Gatwick Road/Radford Road), the exception being the Manor Royal/London Road junction which is smaller, yet still of a lower transport functionality and urban design quality.

In terms of use, Manor Royal road is used as the main thoroughfare east-west within the area, with Fleming Way having a secondary east-west function. In relation to north-south movements, London Road to the west, and Gatwick Road to the east are the primary routes. Vehicle movements occur on the smaller internal roads within Manor Royal and primarily provide access to the businesses that populate the area, and are not used as through routes.

The fact that these gateways provide the link to all the major access routes, and key entry/exit points within Manor Royal, highlights the importance of these gateways in relation to both transport functionality, and as purveyors of Manor Royal's image and 'brand'. As touched upon in the photo vignettes, signage within the study area is generally of a poor quality; both in design and physical appearance. On the whole it is not uniform, is not sighted appropriately, is poorly maintained, and does not promote a sense of place or a specific Manor Royal 'identity' and brand.

Whilst some private owners/businesses have erected attractive and well designed signs, there is no consistency or sense of place when entering or travelling within Manor Royal. The same is true in relation to wayfinding, which is virtually nonexistent within Manor Royal. There are no maps of the area or pedestrian signs (bar the few cycle links), nor any signs showing key routes, locations or amenities within Manor Royal. This also adds to the lack of identity for the area and does not promote a sense of place which reflects the Manor Royal 'brand'. This 'brand' is based on the key gateways, signs, characteristics, entry and exit points, and key features/amenities. There is no assistance in navigating around the area, and there is no indication that one is entering or leaving Manor Royal.

### Key points:

- No defined wayfinding strategy including directions/signs, maps, and key gateways and entry and exit locations
- Signage is not uniform, is poorly maintained and presents indifferent image of Manor Royal at key gateways
- Gateway developments are of higher standard and present a positive 'image' and 'sense of place'
- Has a clear hierarchy of roads and routes between gateways
- Some areas of cycle facilities have poorer service and some areas are not well maintained
- Influence of landscaping and edges on pedestrian environment

## Land Ownership - Public

### INTRODUCTION

The following section comprises the baseline physical audit and analysis as conducted by BDP on site visits during the first half of 2007. The physical audit and assessment covers the following themes:

- Land ownership
- Building heights
- Building age & quality
- Non-industrial uses and amenities
- Landscape & ecology
- Traffic & transportation
- Signage & gateways
- Visual character
- Security

An assessment of the Strengths, Weaknesses, Opportunities and Threats (SWOT Analysis) follows, outlining the key issues concerning Manor Royal at the present time.

### Land Ownership - Public

There is very little land owned by English Partnerships (EP), West Sussex County Council (WSSCC) or Crawley Borough Council (CBC) within Manor Royal, as illustrated on figure 1.6. The exceptions are the main access ways, and three isolated sites.

The first major site is the ecological strip that runs north-south between Gatwick Road and the strategic gap, which is owned by CBC known as Crawters Brook (1). The second and only commercial CBC site within the Manor Royal core is an isolated site to the south of the London Road/Manor Royal junction (2). Within County Oak to the west of Manor Royal, CBC own substantial areas of land (4).

Similarly, WSSCC have very little land holdings of a commercial nature within Manor Royal bar the road and verges to the north, and the cycle ways to the south. WSSCC control a single isolated commercial site, located to the south east of Manor Royal, directly south of Napier Way (3). WSSCC also have a significant site within County Oak (4).

EP do not own any commercial sites within Manor Royal, but do control the major north-south and east-west routes, namely Manor Royal, Fleming Way, Faraday Road, Newton Road, Kevlin Way and Kevlin Lane, and stretches of Gatwick and London Road. They also own a number of smaller access roads to the north including Priestley Way, Rutherford Way and Cobham Way. EP also owns the land occupied by Crompton Way to the south west, and Napier Way to the south east.

#### Key points:

- No substantial public land holdings in Manor Royal
- CBC have substantial land holding in County Oak to the west of Manor Royal
- CBC own Crawters Brook

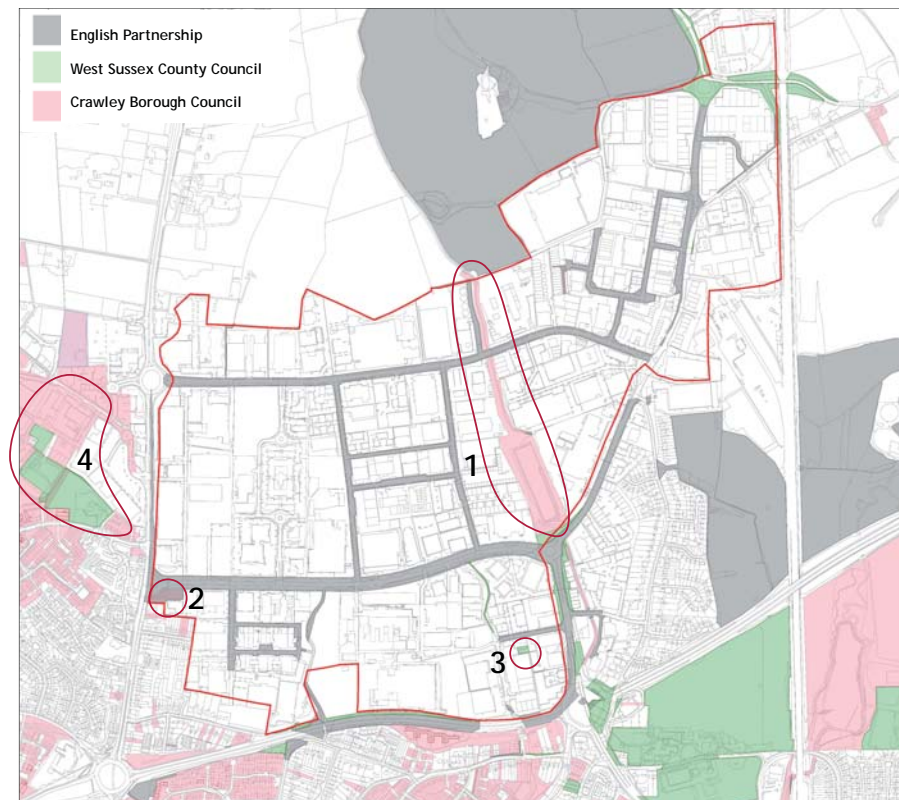


Figure 1.6: Land Ownership - Public



# Building Heights

## Building Heights

Figure 1.7 shows the building heights which currently stand at Manor Royal. As can be seen, there are a number of taller elements emerging in the north-west between the junction of Fleming Way/Faraday Road, and the intersection of London Road/Manor Royal. There are also key taller buildings around the main entry points to Manor Royal, specifically near the junction of London Road/Fleming Way, London Road/Manor Royal, Fleming Way/Gatwick Road and Gatwick Road, north-east of the Manor Royal/Gatwick Road junction.

The figure also shows that the predominant building height is 2-3 storeys, with a number of clusters of 1-2 storey buildings along the south-east periphery and towards the north-east of Manor Royal along Fleming Way/Jenner Road. There are clusters of 3-4 storey buildings around Fleming Way/Faraday Road, and to the west of the site. From the survey work, it is also apparent that the majority of the taller buildings are office, head-quarters and light industrial business uses, whilst the lower height buildings tend to be occupied by warehouses and traditional industrial uses.

In respect to plot ratios, the piecemeal development of Manor Royal has led to a wide variety of plot ratios being developed. Some sites appearing to be underutilised in relation to the efficiency of land use.

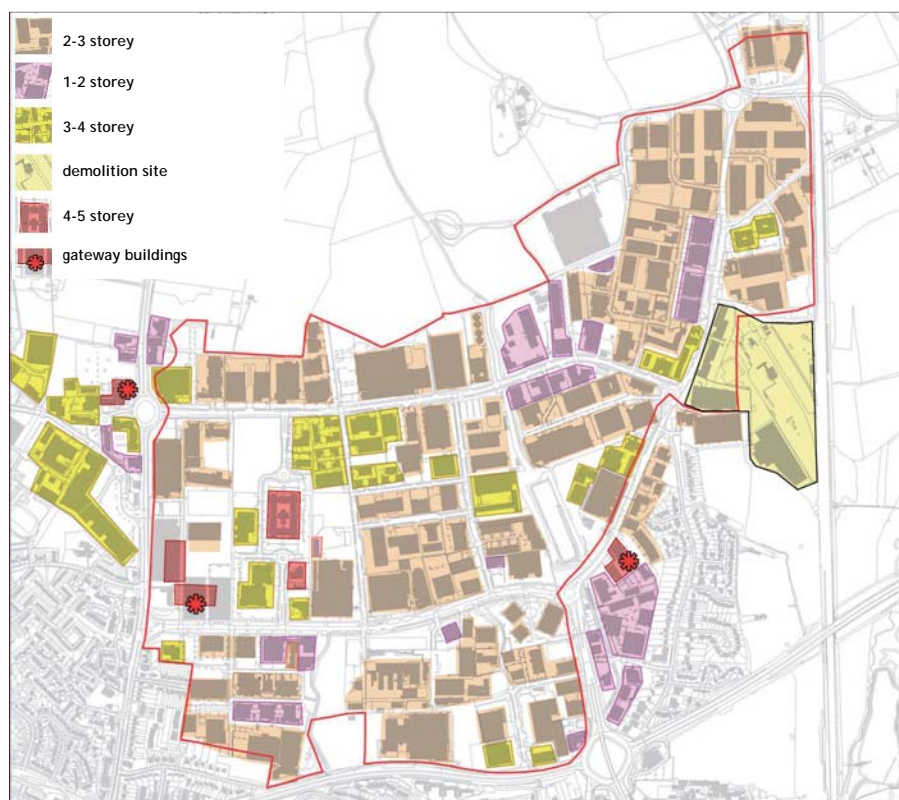


Figure 1.7: Building Heights

### Key points:

- Taller elements emerging near gateways and in clusters
- Taller elements contribute to the 'image' and 'sense of place' of Manor Royal
- Office / Head Quarters buildings are generally taller and denser, whilst traditional industrial B2/B8 uses are lower and less dense
- Majority of buildings at 2-3 storeys
- Clusters of lower 1-2 storey buildings exist in older industrial areas
- Densities appear to be increasing with newer developments taking place
- No uniform plot ratios and mixed efficiency of land use

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## Building Age & Quality

### Building Age & Quality

The audit of premises and identification of age and quality is based on the external appearance and estimates of age. From the assessment of building age and quality, as shown in figure 1.8, the majority of the stock is between the condition of medium age and of a moderate quality, to being in the condition of newer, and of a higher quality.

These moderate/medium buildings are located throughout the site, but are especially clustered in the 'core' of the area and set back from the highly visible gateway sites and key routes. The higher quality newer areas have clustered around the sites running along London Road, from Manor Royal to Fleming Way, and to the south east, along Gatwick Road between Crawley Avenue and Fleming Way, and the junction of Gatwick Road/Manor Royal, and Fleming Way/Gatwick Road.

There are still however pockets of older, poorer quality buildings to the north east and along Gatwick Road and a few isolated older buildings along Manor Royal and Fleming Way. Bar the largely vacant site north of the Gatwick Road/Manor Royal junction (former Thales site), the majority of these older poorer quality stocks remain in active use. This may be because they serve an identified need, for lower priced rents, smaller premises, and contain long-term established tenants.

From the survey work, it is also apparent that the quality of the buildings usually correlates to their use; such that the office, head-quarters and higher-end light industrial business uses tend to be of a higher architectural and urban design quality and offer a better premises specification, whilst the warehouse and industrial uses tend to occupy either poorer older units, or those of less architectural merit (i.e. shed style developments) but which may still be relatively new.

#### Key points:

- Clusters of newer higher quality buildings emerging near key routes and gateways
- Newer/higher quality elements contribute to the 'image' and 'sense of place' of Manor Royal
- Office / Head Quarters buildings generally better architectural quality, whilst traditional industrial B2/B8 uses are functional and of a lower architectural quality
- Older sites may have development potential, whilst newer developments less likely to be redeveloped
- Identifiable clusters emerging

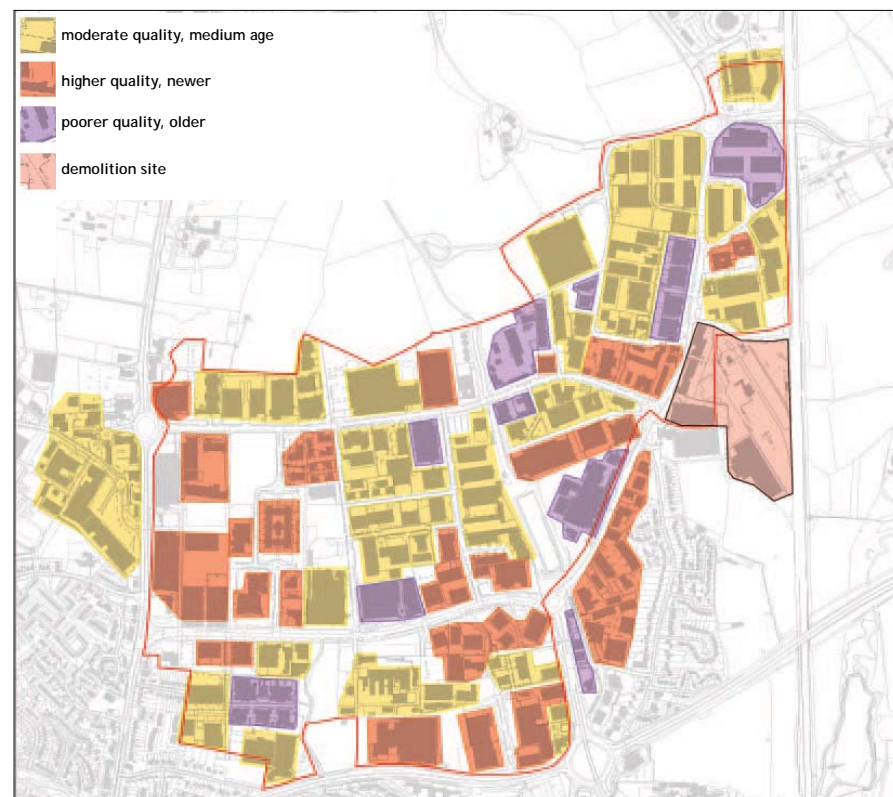


Figure 1.8: Building Age & Quality



# Landscape & Ecology

## Landscape & Ecology

Figure 1.9 shows the landscape and ecology within and adjoining Manor Royal. Whilst there are a large number of mature trees and some landscaped and vegetated areas within private properties, the majority of public realm landscape is confined to Manor Royal road. The two cycle ways that run from Manor Royal southwards are also characterised by a higher than average level of vegetation.

There is an ecological strip that runs north-south from the strategic gap to the Manor Royal/Gatwick Road junction to the south. Whilst this strip is of a high ecological and biodiversity value and contains an important wetland, the amenity value of it is low. Access is convoluted from the south, and from the state of repair and anecdotal evidence, it appears infrequently used.

As can be seen from figure 1.9, and discussed in further detail within the land ownership section which follows, the areas of green to the south-west and north-west of the study area are in private ownership. Further work is required to ascertain their use, amenity value and ecological values. Issues regarding their long-term retention should also be explored.

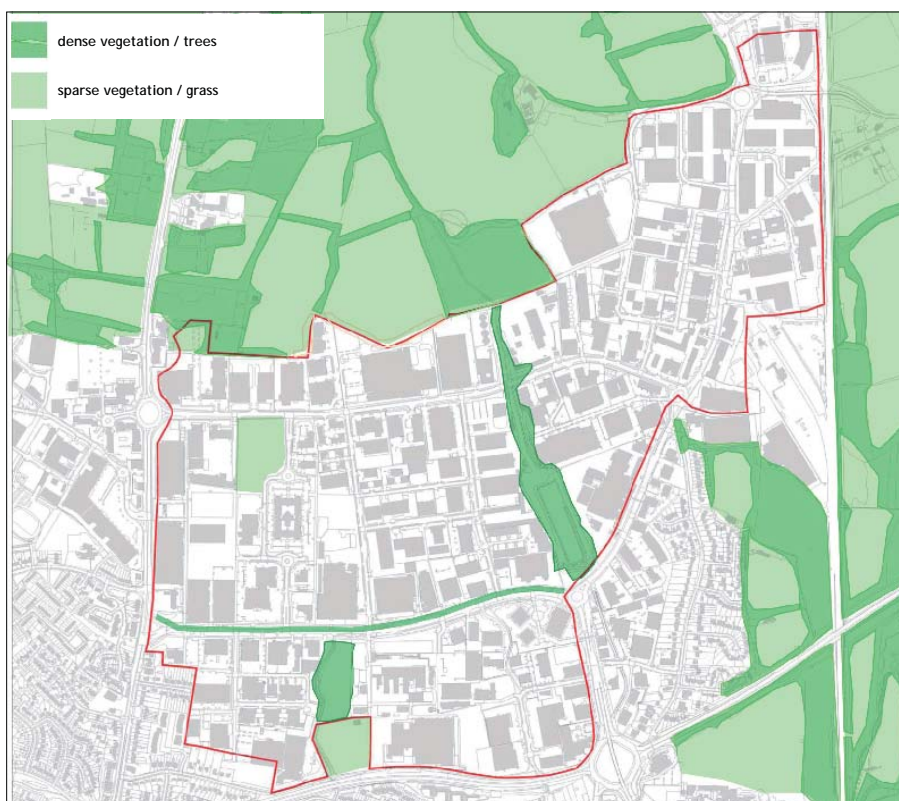


Figure 1.9: Landscape and Ecology

### Key points:

- Manor Royal is surrounded by ecology and openspace
- Low level of ecology open space within the site
- Manor Royal road is an attractive tree lined boulevard
- Fleming Way and Gatwick Road not characterised by the same level of planting
- Western elements of open space in private ownership; assessing their value and ability to be retained
- Eastern ecological corridor of Crawters Brook is of ecological value, but characterised by convoluted access and infrequent use; amenity value is low

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## Non-Employment Uses & Local Amenities

### Non-Employment Uses

There are a number of non-employment uses evident within Manor Royal and the fringe. Of these services that exist, they can be categorised into two broad groups: amenity services, such as retail, food, leisure and banks, and car yard/car sales and other non-employment uses. There are a high number of car yards/car sales businesses both within Manor Royal and on its fringe.

Within the fringe area at County Oak, a number of larger 'out-of-town' retail warehouses have been developed. Some of these larger wholesale/retail uses are also emerging on the fringes of Manor Royal and within, specifically along Manor Royal and Gatwick Road to the south east. A number of other miscellaneous 'service' and sui generis businesses and uses are evident along the south-eastern fringe area. The majority of such uses however have remained clustered around the fringe and have not entered the Manor Royal core area.

There is also a small cluster of start-up/incubator office and business uses to the south of County Oak. This comprises three main organisations, Diamond Enterprise Hub, The Enterprise Centre and Basepoint Business & Innovation Centre. These organisations are supported by a variety of private and public bodies, and provide small business/workspace units at low or subsidised rents and on short leases. They also offer business support functions focused at small and emerging businesses in the area.

#### Key points:

- No retail or amenity core
- Low level and quality of the amenity/service/retail provision
- Mix of non-industrial uses emerging
- Cluster of larger warehouse/retail units in County Oak
- Many large employers provide shuttle service to Crawley Town Centre and have 'canteen' / retail facilities on site
- No significant erosion of core Manor Royal industrial land
- Provision for SME's and start-up businesses

### Local Amenities

There is however a notable lack of smaller/ancillary non-employment uses within the Manor Royal core, especially amenities for workers in the area such as local shops, facilities and services.

The amenity provision is limited to a bank and ATM along Manor Royal road, numerous mobile burger vans, a café on London Road and Subway, and a petrol station/convenience store on Fleming Way. There is also an assortment of other non-industrial uses including a nail bar, bed shop, go-kart track, and other mixed retail uses.

Whilst these uses provide some level of amenity service, it is limited in its quantity and variety, and the Town Centre still provides the main commuting destination to access such uses/services. Many businesses provide these basic services in-house, with canteens and small food and retail outlets serving the immediate work force. Some companies currently drive employees into the Town Centre to meet demand for these goods and services.

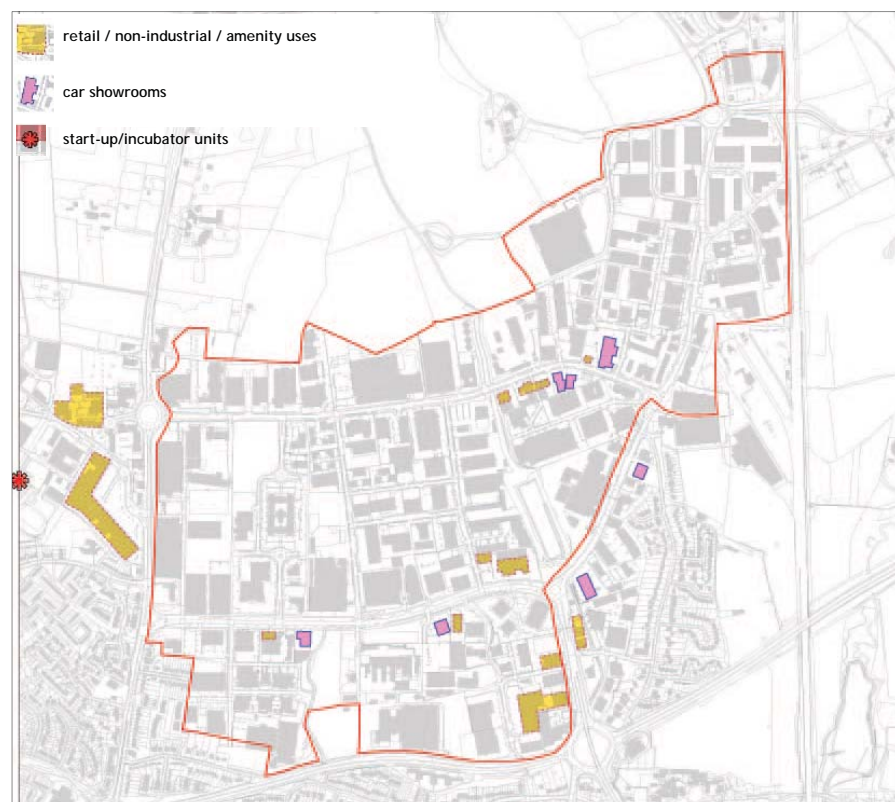


Figure 1.10: Non-Industrial Land Uses and Amenities

# Transport, Signage & Gateways

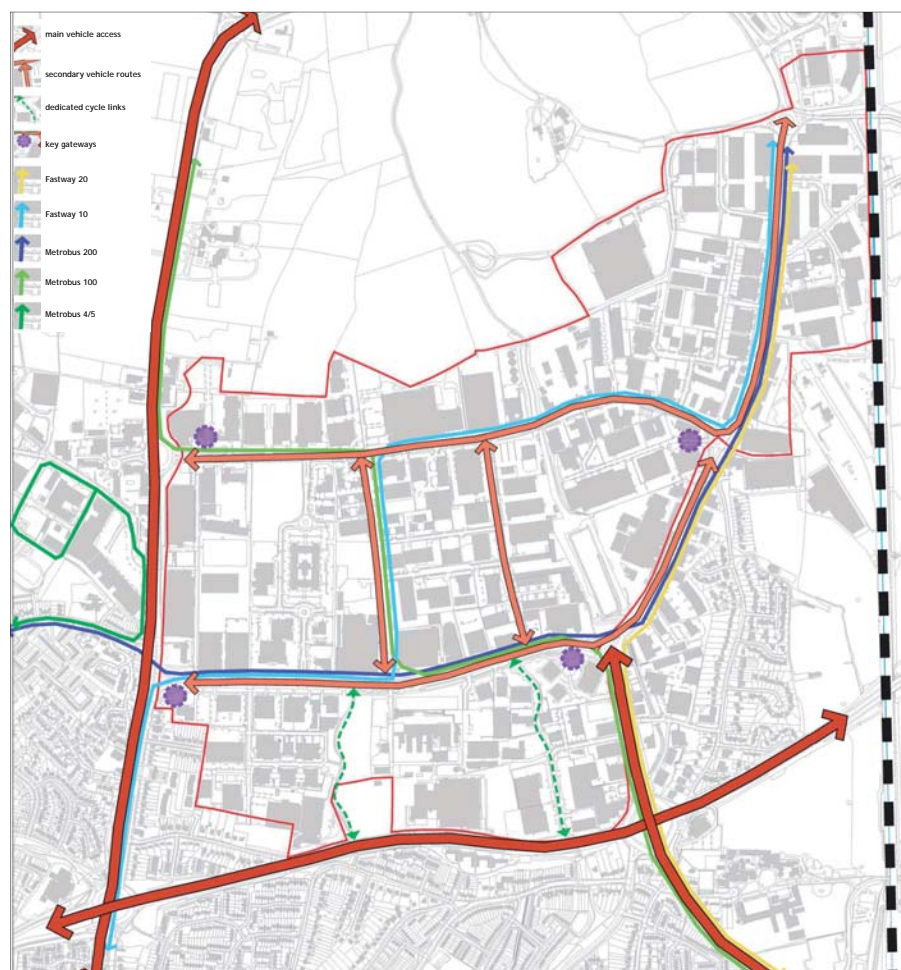


Figure 1.11: Bus Links in Manor Royal and Key Gateways

## Bus Access

As can be seen in figure 1.11, Manor Royal is served by five public bus routes including Fastway. The majority of services run north-south, however there is minimal east-west penetration into the surrounding areas. Whilst no detailed public transport survey work has been undertaken, the following are the main route destinations that serve the Manor Royal area:

- Route 20: Horley - Gatwick - Three Bridges - Broadfield
- Route 100: Redhill - Gatwick - Crawley - Three Bridges -Maidenbower
- Route 10: Gatwick - Crawley - Bewbush
- Route 200: Gatwick - Ifield - Bewbush
- Route 4/5: County Oak - Crawley - Three Bridges - Wakehams Green

Whilst there is a reasonable coverage of destinations, the routes do not appear well used by workers in Manor Royal.

## Vehicular Access and Parking

The site is well served by road, with the A23 running directly past Manor Royal in a north-south direction. The area has good internal access and has high permeability. This has however resulted in the proliferation of large areas of private car parking, and the domination of private vehicles and road based freight movements. Parking problems are particularly evident to the north east of Manor Royal where off street parking is limited, and around the car showrooms, which utilise extensive on-street, verge and forecourt parking to display cars.

The road surfaces within Manor Royal are also varied, with some areas of road in need of repair/maintenance. This is especially evident along the main routes in Manor Royal.

The lack of dedicated commuter parking within the Town Centre and also at the three main rail stations of Crawley, Three Bridges and Gatwick, specifically 'park-and-ride' facilities, results in additional vehicle movements within Manor Royal and increased pressure on roads.

### Key points:

- Good north-south links, poorer east-west links
- Whilst there is a reasonable bus service, it does not appear well used by Manor Royal workers
- Dominance of private vehicles and road use
- Some areas and sites have parking problems

## Cycling & Pedestrians

As shown on figure 1.11, there are a few dedicated cycle links to the residential areas to the south of Manor Royal, however there is not a clear incursion of cycle ways into the wider surrounding area. A number of cycle ways exist through the site, notably along Manor Royal and Fleming Way, however these are shared pedestrian/cycle facilities, and some are of a poor quality, both in design, with the continual crossing of vehicular dominated roads, and physical attributes, with the paving in a state of disrepair, poor signage/markings, level changes and so forth. These appear to not be well used.

The pedestrian environment is also of a poor quality. Surfaces are in need of maintenance, and there are limited pedestrian crossing points. This is particularly evident around the key gateways and peripheral roundabouts. Manor Royal road is very attractive as a tree lined boulevard, and is characterised by an high environmental quality. Some areas of Manor Royal however have poor edges, with no definition between public and private spaces. Other edges have business uses directly fronting the site boundary/ pedestrian way, or blank facades. Open forecourt parking, front servicing, security fencing and so forth also detract from the pedestrian environment, and make wayfinding difficult.



## Rail Access

Direct rail access is poor to Manor Royal, although Gatwick Airport, Three Bridges and Crawley stations are close by. However, these stations do not offer a direct link with Manor Royal, and as such, have a limited offer in relation to commercial and freight movements. The lack of facilities, such as a 'park-and-ride', amongst other factors including a lack of use by Manor Royal employees and perceptions of a poor service, means they are not well used for local journeys, with cars remaining the dominant transport means.

As illustrated on the schematic rail map (fig 1.12), Crawley is well connected on a regional and sub-regional level. The railway provides good services between London and Brighton, and a western branch running to Horsham and beyond (Chichester, Portsmouth & Southsea and destination further west). However, due to connectivity issues between Manor Royal and the three surrounding stations, use of these services is limited.

Notably, with regard to rail connectivity, there is an absence of directly connecting easterly running rail links, with Redhill and Burgess Hill offering the closest east bound interchanges to the north and south of Crawley respectively.

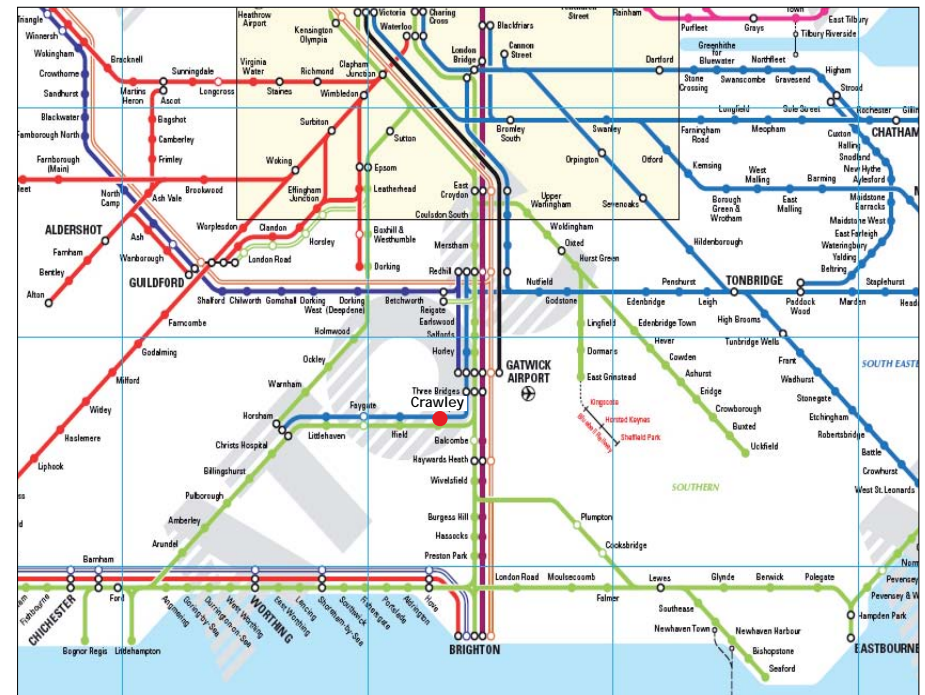


Figure 1.12: Rail Links in the South East

### Key points:

- Good north-south and west links, poor east links to Crawley
- Rail stations not well connected to Manor Royal; railway is not used to move freight to and from Manor Royal

# CASE STUDIES

## Dagenham Docks, Slough Trading Estate and Reading Green Park

### Introduction

As part of the study of Manor Royal, a number of case studies were looked at to compare Manor Royal to other employment/industrial/business locations in the UK. The three case studies chosen are Dagenham Docks; a masterplanned redevelopment of 133 ha of brownfield land in East London. This site was chosen to demonstrate how holistic development through masterplanning and design controls could be ensured over a large site characterised by fragmented ownership. The masterplan and regeneration strategy also focused on creating a sustainable business location on the site.

Slough Trading Estates and Reading Green Park have been used as benchmarks of industrial and employment parks within the UK to allow Manor Royals position within the market to be better understood. Both these sites are mono-ownership.

Reading provides an indication of what a modern planned business park is like, whilst Slough shows the change that an existing estate can undergo to maintain its market position and remain a viable location for businesses.

### Dagenham Docks

The vision for Dagenham Dock was the creation of a best practice example of modern sustainable industrial development covering issues such as recycling operations, energy efficiency, 'green links' between businesses, transportation and waste minimisation on a site that can offer substantial new employment opportunities and a dramatically improved appearance. The vision focuses development at Dagenham Dock around the environmental business sector including recycling and reuse of materials, which effectively takes the current range of activities such as car breakers, glass recyclers and aggregate companies, but moves forward to address the emerging needs of society in the 21st century.

The masterplan was accompanied by a set of design principles which were to be applied to all new development and redevelopment which happened within the 133 ha site. These principles looked to influence both the design of development arising from private investment, and as a set of standards by which the Local Planning Authority could make informed Development Control decisions.

### Slough Trading Estate and Reading Green Park

Whilst these two benchmark exemplars chosen have different qualities to Manor Royal, most notably the single ownership and the fact that they have been masterplanned, they are considered leading examples of current market standards. This is particularly pertinent in the assessment of Manor Royals ancillary offer.

To gauge relative size, an indication of the working population shows that Slough Trading Estate employs 20,000 people, Green Park Reading 7,000 people, and Manor Royal Crawley, 32,000 people. It is the largest in this regard. This is not however reflected in the level of local service provided on site.

Slough Trading Estate consists of:

- 2 health clubs and Corporate Health medical centre,
- 3 children's nurseries and an Adventure Centre,
- 6 eateries,
- 6 banks, 1 post office,
- Sainsbury's, Allied Carpets B&Q, Booker Cash & Carry, urniture Village, JJB Sport, Pets at Home, Mothercare World

Green Park Reading consists of:

- Health and fitness centre,
- Mad House Play and Party World and an 100 child nursery,
- Range of places to eat at a waterfront bar and brassiere,
- Costco cash and carry, Beauty studio

Crawley Manor Royal consists of:

- eateries and mobile food vendors/vans,
- 2 ATMS, bank,
- Nail Bar, Texaco/Spar Mart, Misc.
- large retail / wholesale units (County Oak),
- Go-Kart track

A number of other key points of differentiation exist between the three locations beyond the level of service provision, most notably under the headlines of sustainability, architecture & design, branding, SME/ business support, and landscape and ecology. Each of these is discussed in more detail in the Manor Royal Vision and Strategy in Section Three.

Slough Trading Estate has undergone a large transformation from its initial form in the 1920s as the site where decommissioned military vehicles from World War One were stored, repaired and disposed of. By 1962 sixty privately run factories has opened. To date, 2.25 million sq ft, equalling 30% of the Estate has been rebuilt since 1990. The Estate explicitly states:

"We feel it is important to maintain a good cross-section of industrial and business activities, in order to protect and foster the stimulating and eclectic atmosphere on the Estate. We never want to become just an office park and insist on retaining a good mix of industry sectors and of business sizes."

Slough is planning further masterplan work to the estate, with the express vision of:

"The vision is to create a new thriving centre for business for the next generation that is more accessible to the local community. Through the delivery of the Masterplan, new buildings providing high quality business space, cafes, shops and other amenities, will create a 21st Century working environment."

The vision also includes transport infrastructure work, the addition of enterprise units, offices and shops, and work to create "a sense of arrival onto the Trading Estate with an iconic gateway entrance on the Bath Road and tree-lined boulevards leading to the centre of the Estate." In addition to the sustainable energy centre, buildings are planned incorporating sustainable design and renewable energies.



Figure 1.13: Exemplar industrial design Slough Trading Estates



Figure 1.14: Professional branding on the internet, Slough Trading Estates



Figure 1.15: Regus SME/business support facilities, Reading Green Park



Figure 1.16: Dagenham Dock Site Photo

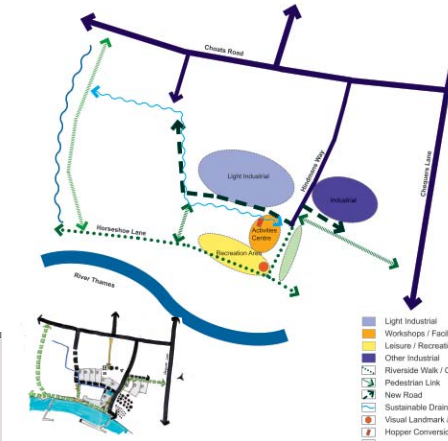


Figure 1.17: Dagenham Dock Concept



Figure 1.18: Sustainable technology, Reading Green Park

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## SECTION TWO:

# ECONOMIC ANALYSIS AND BASELINE





# ECONOMIC BASELINE

## Introduction

Section Two of this report builds a baseline picture of the Crawley economy, with a particular focus on the part of Crawley in which the Manor Royal Employment Area is located. It sets out the latest available information on the current economic conditions of the area and distils key messages on likely future performance. These are set out at the end of the section.

Data has been analysed at ward level, where appropriate, and benchmarked against the sub-region, region and England averages. Analysis also considers the Gatwick Diamond area. The Northgate Ward of Crawley was chosen as a 'best fit' ward for Manor Royal, as it incorporates almost all of the Employment Area, plus a limited area of residential that should not impact on employment analysis. District level analysis has been used to compare the Northgate ward with the wider Crawley district where appropriate.

Constructing a baseline will assist in the development of the Manor Royal Improvement Project by generating data about the current performance of Crawley's economy to provide a clear understanding of the economic needs and opportunities in the area. More specifically, it will help to identify potential for economic growth that will bring more, higher skilled and better paid jobs with higher added value and help to diversify the economic base.

At the outset of this section, it is important to acknowledge the strategic importance of Manor Royal's position within the Crawley economy as well as the wider West Sussex sub-region and Gatwick Diamond area.

The economic baseline is structured around the analysis of eight key themes, as follows:

- Sectoral composition and growth
- Business stock
- Employment change
- Economic activity
- Travel to work
- Hours and earnings
- Deprivation
- Education and skills

The basic facts on Crawley are as follows:

- Demographics: the resident Crawley population was estimated at 98,500 in 2005, of which 63,200 (64%) were of working age.
- Labour force: Crawley is a major net importer of labour. In 2001, 31,400 people travelled to work in Crawley from outside the district, while 10,600 travelled from Crawley to a workplace elsewhere.
- Unemployment: There were 950 registered claimants in Crawley in April 2007 (equivalent to 1.5% of the workforce, compared to 1.6% in the South East and

2.5% in England). The March 2006 ILO (the internationally recognised measure) defined number of unemployed is nearer 2,900 (5.4%).

- Deprivation and social exclusion: Crawley is a fairly affluent place. According to the Index of Multiple Deprivation 2004, it was the 215th most deprived local authority area in England (out of 354), although there are pockets of deprivation in the wards surrounding Manor Royal. Deprivation in Crawley generally appears to be concentrated in the south west corner of the Borough.
- Skills and education: A key reason for economic success in recent years has been the relatively large pool of skilled labour, which employers have been able to draw on - not from within Crawley's resident population but the wider (more affluent) commuter belt. The proportion of Crawley (working age) residents qualified to NVQ3 (38.1%) and NVQ4 (18.4%) has remained well below regional and national averages in recent years. According to the Annual Population Survey in 2005, 18.4% of working age people in Crawley were qualified to this level - more than ten percentage points below the South East average of 29.1%.

## Sectoral Composition and Growth

The importance of Gatwick Airport to the Crawley economy is unequivocal and likely to remain so moving forward. Despite continuing reliance on Gatwick Airport and related supply chain activity, there are signs that the economic base is diversifying away from air transport-related sectors. Crawley has witnessed a substantial growth in employment within business and professional services in recent years (in both absolute numbers employed and as a proportion of total employment). Moreover, this increase has occurred within higher value services, provided by lawyers, accountants, consultants etc. Significantly, the majority of this growth has taken place within Northgate Ward, illustrated by Table 1-1. This is a positive step - reducing reliance on air transport-related sectors - and a key policy challenge identified in local strategies. However, it must be noted that business services are particularly susceptible to the economic cycle.

This expansion is matched by contraction in some travel, manufacturing and retail sub sectors. However, the decline in retail employment within Crawley is likely to reverse in future years as major retail-led development in the town centre comes forward. Crawley Borough Council are working with English Partnerships and partners to deliver regeneration through the development of the Town Centre North area. As well as strengthening the sub-regional retail position, this should elevate Crawley's regional retail role.

**Table 1-1 : Growing and Declining Sectors (3 digit) in the Northgate Ward 2001-2005 (By absolute employment change)**

Top 10 Growth Sectors			Top 10 Declining Sectors		
353 : Manufacture of aircraft and spacecraft	+900	+536%	150 : Manufacture of other food products	-800	-77%
741 : Legal, accounting, book-keeping & auditing activities; tax consultancy; market research & public opinion; business & management consultancy	+800	+114%	633 : Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	-500	-30%
642 : Telecommunications	+600	+204%	621 : Scheduled air transport	-300	-18%
651 : Monetary intermediation	+500	+60%	660 : Insurance and pension funding, except compulsory social security	-300	-63%
553 : Caterers and catering	+300	+25%	521 : Retail sale in non-specialised stores	-200	-20%
851 : Human health activities	+300	+274%	518 : Wholesale of machinery, equipment and supplies	-200	-27%
411 : Sea and coastal water transport	+300	N/A*	523 : Retail sale of pharmaceutical and medical goods, cosmetic and toilet articles	-200	-61%
722 : Software consultancy and supply	+200	154%	742 : Architectural and engineering activities and related technical consultancy	-200	-33%
632 : Other supporting transport activities	+200	+18%	314 : Manufacture of accumulators, primary cells and primary batteries	-200	-100%
514 : Wholesale of household goods	+100	+27%	519 : Wholesale of machinery, equipment and supplies	-200	-27%

\*Note: Increase of approximately 300 jobs from a base figure of zero in 2002.  
Source: Annual Business Inquiry employee analysis (2005), NOMIS © Crown Copyright.

Table 1-1 reinforces the role of Northgate Ward in relation to Gatwick Airport. The top growth sector, measured by absolute change in employees (2003-2005), is the manufacture of aircraft and spacecraft (+900), which has experienced a massive proportional growth of over 500%. There is a spike in transport and airport-related sub sectors unique in Crawley - adjacent districts do not appear to benefit from such companies locating there. Interestingly the legal, accounting and business consultancy sub sector has seen comparable growth of 800 employees over the same period, reinforcing Manor Royal's potential as a location of choice for business and professional services. The growth in software consultancy and supply (82% increase of 350 jobs) brings significant high technology investment to Manor Royal.

However, not all jobs in these sectors are higher value and the service sector is particularly vulnerable to international restructuring, as firms seek out lower cost locations abroad. Such vulnerability was realised with the loss of nearly 750 jobs in data processing between 2003 and 2005; this represented a massive contraction in the sector of some 78%. More than half (315) of all jobs in activities auxiliary to insurance and pension funding in Northgate Ward were lost over the same period.

The greatest net employment loss was labour recruitment and provision of personnel (-861), although more than three quarters of all jobs in this sector remain. The loss of 770 jobs in manufacture of other food products represents a far greater proportion of local employment in the sector (77%) and a sign of ongoing contraction within UK production.

The sustained consolidation, contraction and relocation of major manufacturing firms to lower wage economies can help to explain this. The fragility of current manufacturing operations is palpable and recent job losses are evidence of this. For example, BOC Edwards's service operations were

moved to the Czech Republic and manufacturing to Asia resulting in 90 of 430 (21%) of jobs lost in 2006.

It can be argued that the presence, and economic prominence, of Gatwick Airport continues to conceal structural weaknesses in the Crawley economy. The lack of higher value investment is closely related to the urgent need in the south east M25 area office market - in Crawley in particular - for good quality office space.

**Table 1-2 : Growing and Declining Sectors (3 digit) in Crawley 2003-2005 (By absolute and percentage employment change)**

Top 10 Growth Sectors			Top 10 Declining Sectors		
741 : Legal, accounting, book-keeping and auditing activities; tax consultancy; market research and public opinion polling; business and management consultancy; holidays	+974	+57%	745 : Labour recruitment and provision of personnel	-861	-22%
651 : Monetary intermediation	+407	+39%	150 : Manufacture of other food products	-770	-77%
521 : Retail sale in non-specialised stores	+365	+12%	621 : Scheduled air transport	-753	-9%
722 : Software consultancy and supply	+350	+82%	632 : Other supporting transport activities	-750	-12%
644 : Post and courier activities	+334	+21%	723 : Data processing	-743	-78%
854 : Activities of other transport agencies	+315	+23%	672 : Activities auxiliary to insurance and pension funding	-441	-51%
851 : Human health activities	+300	+17%	751 : Administration of the state and the economic and social policy of the community	-424	-19%
602 : Other land transport	+270	+28%	633 : Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	-368	-17%
411 : Sea and coastal water transport	+260	+1,529%	660 : Insurance and pension funding, except compulsory social security	-315	-61%
853 : Social work activities	+256	+21%	353 : Manufacture of aircraft and spacecraft	-304	-21%
TOTAL	+3,831		TOTAL	-5,729	

Source: Annual Business Inquiry employee analysis (2005), NOMIS © Crown Copyright.

## A very high concentration of air transport and related sectors...

Location Quotients (LQ) are a useful indicator of the relative concentration of employment in a particular sector in a local area. An LQ of 3, for example, would indicate that the sector's percentage share of employment in the local area was 3 times greater than the benchmarks share of employment. Table 1-3 below lists sectors in the Crawley economy (defined at 3-digit SIC level) where the LQ relative to Great Britain is greater than 2.0 and more than 100 people are employed.

Location quotient analysis reveals a massive concentration of air transport and related sectors plus advanced manufacturing and medical/pharmaceutical specialisms. Although the economic base is fairly diverse, the concentration of employment in related sectors highlights a potential over-reliance on the Gatwick supply chain.

- More than 10,000 people or 13% of total employees work in the air transport sector.
- Scheduled Air Transport has an exceptional LQ of 51.5 and employs 2,300 people.
- The relative concentration of Non-Scheduled Air Transport is also very high (LQ = 36.2) but the sector

provides more than three times the number of local jobs than scheduled air services (7,900 or 9.9% of total employment).

- A further 5,400 people are employed in Other Supporting Transport Activities.

This analysis emphasises the importance of the Gatwick supply chains activity in the Crawley area. There is a massive concentration of air transport and related activity plus advanced manufacturing & medical/pharmaceutical sub sectors. High LOs are found in the air transport and catering sub sectors, reflecting the critical mass of major firms at Manor Royal and their relationship to Gatwick airport.

Local economic development strategy focuses on increasing the proportion of employment in non-airport related or dependent businesses.

**Table 1-3 : Prominent Sectors in the Crawley Economy, 2005**  
Defined at 3-digit SIC level; sectors eligible with a Location Quotient greater than 2.0 relative to Great Britain and at least 100 employees

Sector (3-digit SIC)	Employed (000s)	Share of Total	LO vs England
622 : Non-scheduled air transport	2,300	2.9%	51.73
621 : Scheduled air transport	7,900	9.9%	32.64
283 : Manufacture of steam generators, except central heating hot water boilers	200	0.3%	15.32
632 : Other supporting transport activities	5,400	6.8%	14.17
322 : Manufacture of television and radio transmitters and apparatus for line telephony and line telegraph	500	0.7%	9.79
634 : Activities of other transport agencies	1,700	2.1%	7.46
331 : Manufacture of medical and surgical equipment and orthopaedic appliances	700	0.9%	7.38
611 : Sea and coastal water transport	300	0.4%	6.32
297 : Manufacture of domestic appliances not elsewhere classified	400	0.5%	5.64
633 : Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified	1,800	2.3%	5.47
353 : Manufacture of aircraft and spacecraft	1,100	1.4%	4.46
223 : Reproduction of recorded media	100	0.1%	4.35
332 : Manufacture of instruments and appliances for measuring, checking, testing, negotiating and other purposes, except industrial process control equipment	700	0.9%	4.10
746 : Investigation and security activities	1,700	2.1%	3.41
725 : Maintenance and repair of office, accounting and computing machinery	200	0.3%	3.04
244 : Manufacture of pharmaceuticals, medicinal chemicals and botanical products	500	0.6%	2.94
555 : Cafeterias and Catering	2,100	2.7%	2.78
291 : Manufacture of machinery for the production and use of mechanical power, except aircraft, vehicle and cycle engines	500	0.6%	2.66
511 : Wholesale on a fee or contract basis	500	0.6%	2.28

Source: Annual Business Inquiry employee analysis (2005), NOMIS, ©.

### A location for knowledge-based employment...

Employment within KBI is seen as an indicator of economic progress and this can be measured by using a proxy indicator which has been developed by the Local Futures Group2.

This definition focuses on private sector employment (public sector is excluded), where more than 25% of the workforce is of a graduate level (NVQ4) or higher. An incredibly high proportion of workers (41.9%) are employed in knowledge-based industries but this compares sorely with the share of

local residents who find employment in these sectors. Similarly, a significant number of people are employed within the Aviation Cluster3, reflecting the proximity of Gatwick Airport and the volume of employment within aviation related and dependent industries (see Table 1-4).

**Table 1-4 : Rank of % Employment by Aviation Cluster and Knowledge-Based Industries (2005)**

Aviation Cluster			Knowledge-Based Industries		
Area	Total employees	% of total employment	Area	Total employees	% of total employment
Crawley	17,000	21.3%	Northgate Ward	13,500	41.9%
Northgate Ward	4,200	13.0%	Crawley	88,000	38.9%
West Sussex	18,600	5.5%	South East	1,169,395	31.1%
South East	43,300	1.2%	West Sussex	99,495	29.4%
England	210,500	0.9%	England	6,497,786	28.3%

Source: Annual Business Inquiry employee analysis (2005), NOMIS © Crown Copyright.

### Employment Change

Recent employment growth in the Northgate Ward bucks wider trends and is being fuelled by high growth in male full-time employment. Between 2003 and 2005, employment within Northgate Ward increased by some 1,400 jobs (4.8%). Track back further and the growth is more pronounced; between 1998-2005, employment in the Northgate Ward increased by 11.0%, slightly above the figure for Crawley as a whole (9.9%). While employment has continued to grow, albeit at a slower rate, there has been a recent fall in employment across Crawley (-2.3%), illustrated in Table 1-5.

**Table 1-5 : Employment Change 2003-2005**

	2003	2004	2005	Absolute Change	% Change
Northgate Ward	30,800	30,800	32,200	1,400	4.8%
Crawley	81,600	80,000	79,700	-1,900	-2.3%
West Sussex	332,800	331,100	338,500	5,700	1.7%
South East	3,627,500	3,657,400	3,762,400	135,900	3.7%
England	22,286,300	22,565,300	22,921,700	635,400	2.9%

Source: Annual Business Inquiry employee analysis (2005), NOMIS, ©.

Furthermore, employment is growing faster than the resident workforce, leading to local labour supply shortages. It is one thing for Crawley to be a successful employment destination, quite another for it to generate real opportunities (and wealth) for local people. Employment has been increasing at a far greater rate than the resident workforce. In the face of this challenge, current delivery plans focus on the need to ensure that employment land allocations generate jobs no faster than the increase in workforce, avoiding pressure on housing resulting from labour demand.

**Table 1-6 : Top 10 Employment Sectors 2005**

Sector (3-digit SIC)	Total jobs & Employment Share 2005			Employment Change 2003-2005	
	Northgate Ward (jobs)	Northgate Ward (%)	Crawley (jobs)	Northgate Ward	Northgate Ward (%)
Other retail sale of new goods in specialised stores	2,700	8.3%	6,2%	+2	+0.1
Labour recruitment and provision of personnel	2,100	6.5%	3.8%	-85	-3.9
Scheduled air transport	1,500	4.7%	9.9%	-344	-18.4
Canteens and Catering	1,500	4.7%	2.7%	+302	+25.2
Post and courier activities	1,500	4.5%	2.4%	+262	+21.9
Legal, accounting etc	1,400	4.4%	3.3%	+757	+114.0
Other supporting transport activities	1,200	3.9%	6.8%	+187	+17.7
Monetary intermediation	1,200	3.8%	1.8%	+453	+59.6
Activities of travel agencies etc	1,100	3.6%	2.3%	-486	-29.8
Manufacture of aircraft and spacecraft	1,000	3.3%	1.4%	+884	+535.8
Proportion of economy	15,324	47.6%	40.8%		

Source: Annual Business Inquiry employee analysis (2005), NOMIS, ©.

In the wider West Sussex (and South East) context, Crawley is singled out as a fairly affordable housing area. However, this makes no adjustment for commuting patterns relating to the concentration of high value activities (and by implication high workplace based earnings). There is evidence of excessive employment growth - in future need to ensure that scale of residential and employment allocations support appropriate and balanced economic growth. Table 1-6 provides a snapshot of the main employment sectors in Northgate Ward and the wider Crawley district and employment change in these sectors. There has been a sharp increase in the business services sector within Northgate. The spatial distribution of employment growth is concentrated on Manor Royal Employment Area.

### Business Stock

As of 2005, Crawley was home to 2,235 VAT registered firms and 3,564 business units. This equates to 36.2 firms per 1,000 population, which lags behind the England rate (39.0) and is significantly lower than the sub-region and region (both 43.8). The characteristics of the business stock are discussed in further detail below.

### A large firm economy...

West Sussex and the wider South East are characterised by their small firm economies but Crawley - and Northgate ward in particular - bucks this trend. The local size distribution of firms varies significantly from the national, regional and sub-regional averages in every sizeband. This disparity reflects the high concentration of large firms, particularly on Manor Royal. There are 37 firms with 200 or more employees in the Northgate Ward, which is equivalent to 3.7% of all firms and five times higher than the national

average (0.7%). Three times as many firms employ 50 employees than the England average. This analysis also exposes the very small proportion of micro businesses; the number of firms with 1-10 employees (64%) is 20 percentage points lower than the national average (84%).

**Table 1-7 : Size distribution of firms 2005**

Area	1-10 employees	11-49 employees	50-199 employees	200 or more employees
Northgate Ward	64.0%	23.8%	8.4%	3.7%
Crawley	74.6%	17.5%	5.9%	2.1%
West Sussex	85.1%	11.7%	2.6%	0.6%
South East	85.4%	11.4%	2.6%	0.6%
England	84.0%	12.4%	3.0%	0.7%

Source: Annual Business Inquiry workplace analysis (2005), NOMIS © Crown Copyright.

This a growing trend, which reflects the dynamics in the wider sub-region (Table 1-8). Over two years from 2003-2005, the proportion of large firms increased by 5.7%, more than twice the Crawley average (2.7%).

**Table 1-8 : Percentage increase in firms by sizeband 2003-2005**

Area	1-10 employees	11-49 employees	50-199 employees	200 or more employees
Northgate Ward	0%	+3.9%	-1.2%	+5.7%
Crawley	+3.4%	+3.4%	+5.4%	+2.7%
West Sussex	+3.3%	+6.3%	+6.0%	+6.0%
South East	+4.7%	+4.9%	+4.0%	+4.0%
England	+5.0%	+2.6%	+2.1%	+2.1%

Source: Annual Business Inquiry workplace analysis (2005), NOMIS © Crown Copyright.

The distribution of employees by sizeband mirrors the distribution of firms by sizeband, illustrated in Table 1-9. Nearly half of all employees in Northgate Ward work in large firms with 200 or more employees (such as Virgin Atlantic Airways, GlaxoSmithKline and Unilever).

**Table 1-9 : Percentage of employees by size distribution of firms 2005**

Area	1-10 employees	11-49 employees	50-199 employees	200 or more employees
Northgate Ward	8.0%	16.7%	26.0%	49.3%
Crawley	10.1%	18.3%	24.6%	47.0%
West Sussex	22.4%	26.9%	24.0%	26.7%
South East	22.8%	25.5%	23.9%	27.8%
England	20.8%	24.8%	23.9%	30.5%

Source: Annual Business Inquiry employee analysis (2005), NOMIS © Crown Copyright.

Entrepreneurship is an important marker of a dynamic economy but a characteristic that is sorely lacking in Crawley at present. The high concentration of large firms and low proportion of small firms has a clear negative impact on VAT registration rates, which continue to lag behind VAT de-registration rates. Table 1-10 reveals the low VAT registration rate (per 10,000 working age population) in Crawley (35.6) compared to England (50.9). The gap is even starker relative to the South East (55.6). Strikingly, Crawley would need an additional 126 business start ups per year to achieve the regional average.

economic baseline

2

Area	VAT Registrations (per 10,000)	VAT Deregistrations (per 10,000)	% Net change in business stock	Business density (per 1,000)
Crawley	35.6	37.2	-4.3%	36.2
West Sussex	50.4	49.8	1.1%	43.8
South East	55.6	49.4	12.6%	43.8
England	50.9	43.5	16.8%	39.0

Sources: VAT Registrations/Deregistrations (2005), NOMIS © Crown Copyright.

In Crawley in 2005, there were 225 new VAT registrations compared to 235 VAT deregistrations, leading to a net decrease in the business stock of -10 (or -4.3%) to 2,235. The net number of new firms in Crawley decreased by 25 (-10%) between 2001 and 2005, against the grain of increases in the South East and England (1.6% and 4.3% respectively). This is not a new trend - VAT registration rates have been falling in Crawley and the wider West Sussex sub region for several years (Table 1-11).

Area	VAT Registration Rate			VAT De-registration Rate		
	2001	2005	Change	2001	2005	Change
Crawley	39.56	35.60	-3.96	40.35	37.18	-3.16
West Sussex	54.96	50.39	-4.57	50.50	49.63	-0.67
South East	54.74	55.63	0.89	48.15	49.43	1.28
England	48.83	50.85	2.02	44.60	43.53	-1.07

Sources: VAT Registrations/Deregistrations (2005), NOMIS © Crown Copyright.

## Economic Activity

The evidence base prepared for the Regional Economic Strategy 2006-2020 identifies high job density and low relative levels of economic inactivity in Crawley<sup>4</sup>. However, 2006 data from the Annual Population Survey suggests employment rates are decreasing faster than the England average.

Area	Employment Rate		% Point Change
	2001	2006	
Crawley	83.6	82.1	-1.5
West Sussex	80.7	78.5	-2.2
South East	80.2	78.6	-1.6
England	75.2	74.3	-0.9

Sources: Annual Population Survey/Labour Force Survey © Crown Copyright.

Indeed, Crawley exhibits above average unemployment rates (5.4% in 2006), particularly in the sub-regional context, where unemployment stands at only 3.6%. Furthermore, the proportion of residents aged 18-24 and unemployed for one year or more is increasing. However, there is a low relative (and falling) claimant count: 1.7% in April 2007 (Table 1-14).

Area	ILO Unemployment Rates		% Point Change
	Apr 2004 - Mar 2005 (%)	Apr 2005 - Mar 2006 (%)	
Crawley	5.2	5.4	0.2
West Sussex	3.3	3.6	0.3
South East	3.7	4.0	0.3
England	4.7	5.1	0.4

Sources: Annual Population Survey © Crown Copyright.

Area	April 2005		April 2006		April 2007		Change 2005-2007
	Number	Rate	Number	Rate	Number	Rate	
Northgate Ward	50	1.8	57	2.1	47	1.7	-6.0%
Crawley	1,100	1.7	1,100	1.8	950	1.5	-12.5%
West Sussex	5,650	1.3	6,500	1.5	5,600	1.3	-0.9%
South East	73,000	1.5	84,650	1.7	77,850	1.6	6.7%
England	711,700	2.3	813,400	2.6	767,700	2.5	7.9%

Sources: NOMIS Claimant Count © Crown Copyright.

Industry	Northgate Ward		Crawley	
	Vacancies	%	Vacancies	%
Financial and business services	204	68.7%	489	55.1%
Other service activities	25	8.4%	57	6.4%
Wholesale/retail distribution/repair	22	7.4%	80	9.0%
Transport, storage & communications	18	6.1%	160	18.0%
Hotels and catering	15	5.1%	64	7.2%
TOTAL	284	95.7%	850	95.7%

Sources: NOMIS Vacancies by Industry © Crown Copyright.

In May 2007, 95% of Jobcentre Plus vacancies were found in five employment service categories (Table 1-15). In particular, there is a high number of vacancies in financial and business services; in May 2007, 68.7% of Jobcentre Plus vacancies in the Northgate Ward (204 in total) were in this employment service category. Although this is a national trend (the figure for England is 59.3%), the local vacancy rate is more than ten percentage points higher than Crawley (55.1%), West Sussex (52.9%) and the South East (58.4%). The mismatch between skills demand and supply is discussed later in this section.

While the majority of working age residents are in employment, many are employed in low skilled or low paid work. This is inadequate given the wider regional economic context. Although the Census 2001 data is now six years out of date, it does enable ward level analysis (Table 1-16). Tellingly, Northgate Ward has a lower proportion of higher and lower managerial professional occupations than Crawley, West Sussex, the South East and England.

Occupation	Northgate Ward	Crawley	South East	England
Higher managerial and professional occupations	6.5%	8.3%	10.8%	8.6%
Lower managerial and professional occupations	19.2%	20.3%	21.2%	18.7%
Intermediate occupations	13.6%	13.8%	10.3%	9.5%
Small employers and own account workers	5.2%	5.5%	7.8%	7.0%
Lower supervisory and technical occupations	9.7%	9.1%	6.8%	7.1%
Semi-routine occupations	12.8%	13.1%	10.6%	11.7%
Routine occupations	9.0%	8.6%	7.3%	9.0%
Never worked or long-term unemployed	2.0%	2.0%	2.2%	3.7%
Not classified	22.1%	19.3%	23.0%	24.7%

Sources: ONS Census 2001 © Crown Copyright.

A more detailed analysis of employment occupation groups,

using 2006 data, reveals surprisingly low level of science & technology professionals but significant employment in administration and service, sales & transport occupations. Notably, the number of corporate managers as a proportion of total employees (10.2%) is four percentage points lower than the regional average (14.2%).

There is a greater than average proportion of people working in Crawley in lower skilled occupations and the sales sector compared with other districts in the Gatwick Diamond area. 5.5% of Crawley residents work in elementary trades, plant and storage related jobs, which is well above the regional average (2.9%). Some 4,000 people (7.4%) are employed in sales occupations, higher than the South East (6.0%) and England (6.3%), which are both strong service sector economies.

Table 1-17 : Employment Occupation Groups for Crawley residents, compared to the South East and England (2006)

Occupation	Crawley		South East		England	
	Number	%	Number	%	Number	%
Elementary administration & service occupations	6,700	12.4	7.2	7.2	7.8	7.8
Corporate managers	5,500	10.2	14.2	14.2	12.4	12.4
Sales occupations	4,000	7.4	6.0	6.0	6.3	6.3
Transport & mobile machine drivers/operators	4,000	7.4	3.2	3.2	3.9	3.9
Administrative occupations	3,700	6.8	9.5	9.5	9.3	9.3
Business & public service assoc. professionals	3,600	6.6	6.3	6.3	5.5	5.5
Managers/proprietors in agriculture/services	3,500	6.5	3.0	3.0	3.0	3.0
Caring personal service occupations	3,500	6.4	6.1	6.1	6.0	6.0
Elementary trades, plant and storage related	2,900	5.5	2.9	2.9	3.4	3.4
Process, plant and machines operatives	2,000	3.7	2.2	2.2	3.4	3.4
Customer service occupations	1,800	3.3	1.1	1.1	1.3	1.3
Skilled construction and building trades	1,700	3.1	3.7	3.7	3.9	3.9
Leisure and other personal service occupations	1,500	2.8	2.0	2.0	1.9	1.9
Science and technology professionals	1,500	2.7	4.5	4.5	3.6	3.6
Secretarial and related occupations	1,400	2.6	3.3	3.3	3.1	3.1
Teaching and research professionals	1,100	2.0	5.1	5.1	4.9	4.9
Health & social welfare assoc. professionals	1,000	1.9	3.5	3.5	3.8	3.8
Health professionals	900	1.6	1.0	1.0	1.1	1.1
Protective service occupations	800	1.5	1.2	1.2	1.2	1.2
Skilled metal and electronic trades	800	1.5	3.8	3.8	4.2	4.2
Science & technology associate professionals	800	1.4	1.8	1.8	1.6	1.6
Business and public service professionals	N/A <sup>1</sup>	N/A <sup>1</sup>	3.5	3.5	3.3	3.3
Culture, media and sports occupations	N/A <sup>1</sup>	N/A <sup>1</sup>	2.1	2.1	2.3	2.3
Skilled agricultural trades	N/A <sup>1</sup>	N/A <sup>1</sup>	1.2	1.2	0.9	0.9
Textiles, printing and other skilled trades	N/A <sup>1</sup>	N/A <sup>1</sup>	1.6	1.6	1.9	1.9
Total	54,000	97	100	100	100	100

<sup>1</sup> Notes: Estimate and confidence interval not available since the group sample size is zero or disclosive (0-2).

Sources: Annual Population Survey (Jun 2006), NOMIS © Crown Copyright.

## Travel to Work

An analysis of travel to work data highlights strong but complex interrelationships with adjoining areas.

## A strong in-commuting pattern...

Crawley is a net importer of labour. 31,400 people travelled to work in Crawley from outside the district, while 10,600 travelled from Crawley to a workplace elsewhere. This equates to a net inflow of commuters of some 20,800

employees at the time of the Census 2001. Major suppliers of labour to the Crawley economy in 2001 were Mid Sussex (10.1% of the local workforce), Horsham (7.9%) and Reigate and Banstead (6.3%). There is also a strong link with Croydon: 1,600 (2% of the Crawley workforce) commute in and it is an employment destination for 700 Crawley residents. The three major employment destinations are Reigate and Banstead (5.4%), Mid Sussex (3.9%) and Horsham (3.7%). This pattern is even more pronounced in the Northgate ward. In 2001, 18,000 people travelled into the area for work, 20 times the number of out commuters (800), reflecting the economic pull of Manor Royal as a strategic employment location.

The strong in-commuting pattern emphasises the labour supply problem which Crawley is experiencing. There is clear evidence that this is related both to the availability of the workforce - local strategy highlights anecdotal evidence of massive travel to work distances for night shift workers - and skills shortages/gaps in the resident population. Consequently, the economic benefits of employment growth in Crawley are being realised in other locations, where workers live and spend their (higher) wages.



### A net inflow of managerial and professional staff...

An analysis of commuter characteristics by Employment Class (Table 1-18) reveals a net inflow of managerial and professional staff. For example, approximately 8,300 people commute into Crawley from Mid Sussex, nearly half of whom are in Employment Class 1 or 2, compared to less than one third of Crawley residents working in the district. This analysis is supported by the local economy section of Crawley's Community Strategy - A Vision for Crawley - which highlights how in-commuting is filling the "human capital gap" (p5). There are two important messages from this analysis:

- Firstly, higher skilled employees are commuting into Crawley to fill posts that cannot be filled by the local, lower skilled population. Therefore, local residents are not benefiting from career opportunities arising from economic growth.
- Secondly, the trend for higher value, better paid jobs to be filled by higher skilled in-commuters helps to explain the disparity between residence and workplace based earnings. Again, local residents are not benefiting from higher salaries arising from higher value employment opportunities.

District of Origin	In-Commuting				Out-Commuting				
	No. of People	%	% travel to work by car	% of Commuters in Employment Class 1 & 2 <sup>1</sup>	Employment Destination	No. of People	%	% travel to work by car	% of Commuters in Employment Class 1 & 2
Crawley	36,000	43.8%	55.8%	30.0%	Crawley	36,000	70.3%	55.8%	30.0%
Mid Sussex	8,300	10.1%	82.6%	49.8%	Reigate and Banstead	2,700	5.4%	82.7%	46.9%
Horsham	6,500	7.9%	87.0%	57.3%	Mid Sussex	2,000	3.9%	80.6%	38.0%
Reigate and Banstead	5,200	6.3%	75.8%	43.0%	Horsham	1,900	3.7%	78.9%	39.8%
Brighton and Hove	4,400	5.3%	75.3%	56.6%	Mole Valley	1,000	1.9%	83.7%	39.6%
Tandridge	1,800	2.2%	90.8%	46.3%	Tandridge	800	1.6%	84.5%	36.5%
Croydon	1,600	2.0%	65.7%	51.6%	Croydon	700	1.3%	58.4%	63.5%
Wealden	1,400	1.7%	92.8%	59.5%	Westminster	600	1.1%	11.3%	69.6%
Worthing	1,100	1.4%	85.4%	55.7%	City of London	500	0.9%	6.5%	82.3%
Lewes	1,000	1.2%	81.6%	52.9%	Brighton and Hove	400	0.7%	81.7%	66.9%
<b>Top 10</b>	<b>67,400</b>	<b>82.1%</b>		<b>50.3% average</b>	<b>Top 10</b>	<b>46,600</b>	<b>90.9%</b>		<b>51.3% average</b>
<b>Total number of non-Crawley workers</b>	<b>31,400</b>	<b>32.8%</b>		<b>52.5% average</b>	<b>Total number of non-Crawley workers</b>	<b>10,600</b>	<b>20.7%</b>		<b>53.7% average</b>

Source: ONS Census Origin & Destination, 2001 © Crown Copyright.

### Hours and Earnings

#### More full-time employees...

Crawley exhibits an above average share of full-time employment, illustrated in Table 1-19. This pattern is even more pronounced in the Northgate Ward, where the proportion of full-time employees (77.7%) is approximately 10 percentage points higher than the average for both the South East (67.1%) and England (68.0%). Conversely, only 22.3% of employees work part-time, compared to 32.9% in the South East and 32.0% in England overall. Employment growth in both full-time and part-time positions is markedly higher than sub-regional, regional and national rates. Significantly, Northgate Ward bucks the wider Crawley trend for declining full-time (-1.5%) and part-time (-4.5) employment.

Area	2003		2005		Change F-T 2003-2005		Change P-T 2003-2005	
	F-T	P-T	F-T	P-T	Absolute	%	Absolute	%
Northgate Ward	77.9%	22.1%	77.7%	22.3%	1,067	4.5%	399	5.88%
Crawley	72.2%	27.8%	72.9%	27.1%	-860	-1.5%	-1,018	-4.5%
West Sussex	66.6%	33.4%	66.1%	33.9%	2,137	10.0%	3,619	3.3%
South East	66.5%	33.5%	67.1%	32.9%	112,541	4.7%	22,355	1.8%
England	68.2%	31.8%	68.0%	32.0%	392,566	2.6%	242,846	3.4%

Source: Annual Business Inquiry employee analysis (2005), NOMIS © Crown Copyright.

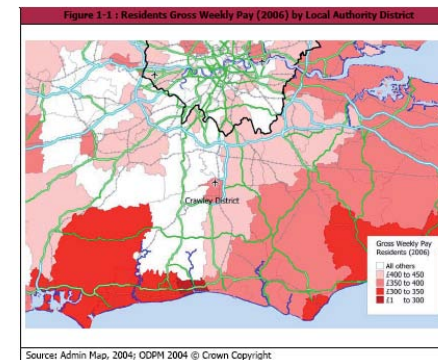
### Relatively high wage levels...

Crawley benefits from higher than average earnings; wage levels reflect the industrial structure of the district and the prominence of higher value business and financial services sectors. However, there is a clear disparity between residence and workplace earnings.

Resident analysis data from the 2006 Annual Survey of Hours and Earnings reveals that the gross weekly pay of all (full and part time) employees resident in Crawley (£465) is nearly 5 percentage points higher than the national average (£444) but lags behind the South East.

Residence Based			Workplace Based		
Rank by Area	Mean weekly pay - gross	% points above GB average	Rank by Area	Mean weekly pay - gross	% points above GB average
South East	£489.40	+10.2	Crawley	£504.70	+14.0
<b>Crawley</b>	<b>£465.00</b>	<b>+4.7</b>	South East	£461.20	+4.2
West Sussex	£446.80	+0.6	Great Britain	£442.80	0.0
Great Britain	£444.20	0.0	West Sussex	£411.50	-7.1

Source: Annual Survey of Hours and Earnings (ASHE) Resident Analysis & Workplace Analysis (2006), NOMIS © Crown Copyright.



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### A clear disparity between residence and workplace earnings...

However, analysis of wages by workplace tells a somewhat different story. At £505, the gross weekly pay of all (full and part time) employees working in Crawley is £62 or 14 percentage points above the national average (£443). The gap between residence and workplace earnings is even more pronounced for full time workers.

People living in Crawley earn per week...		People working in Crawley earn per week...	
• £40 less than people working in Crawley	• £40 more than people living in Crawley	• £20 more than residents of West Sussex	• £93 more than the sub-regional average
• £24 less than the regional average	• £43 more than the regional average	• £25 more than the national average	• £62 more than the national average

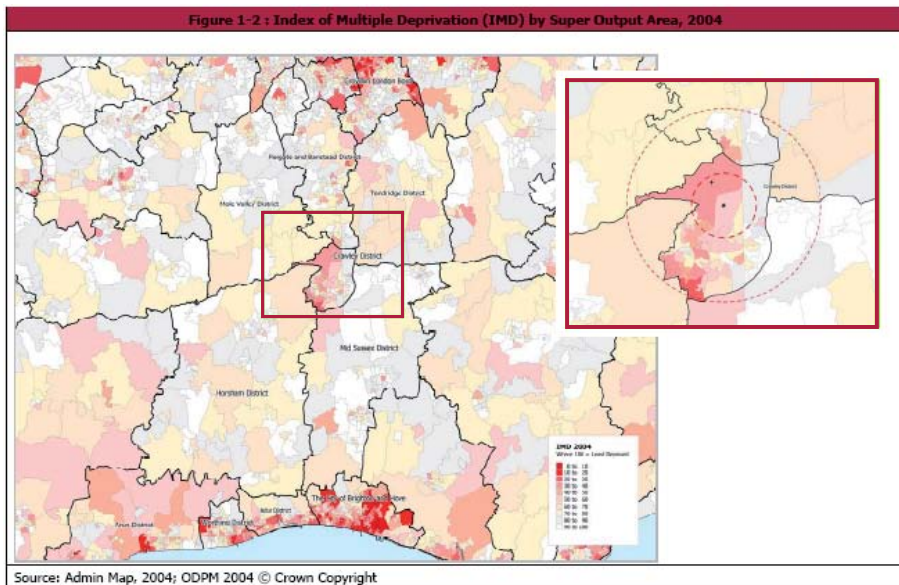
However, there has been a significant increase (13%) in full time residents' wages in recent months, well above the national average (4%) (see Table 1-22).

Area	Total		Full-Time		Part-Time	
	2006 (£)	% change 2005-06	2006 (£)	% change 2005-06	2006 (£)	% change 2005-06
Crawley	465.00	+10%	553.20	+13%	174.20	-1%
West Sussex	446.80	+2%	558.50	+6%	167.70	-11%
South East	489.40	+3%	598.50	+4%	181.60	0%
England	450.30	+4%	548.00	+4%	172.50	+2%
Great Britain	444.20	+4%	540.50	+4%	171.90	+2%

Source: Annual Survey of Hours and Earnings (ASHE) Resident Analysis (2006), NOMIS © Crown Copyright.

### Low levels of deprivation...

The Index of Multiple Deprivation (IMD) provides a picture of relative levels of deprivation. Overall Crawley fairs very well in a national context. According to the IMD 2004, Crawley is the 215th (out of 354) most deprived local authority area in England (1 being the most deprived and 354 being the least deprived). This reflects the low levels of deprivation in this part of the country; Crawley and the wider Gatwick Diamond have no Super Output Areas falling within the 20% most deprived SOAs nationally. Whilst Crawley is a fairly affluent place, it does contain 18 SOAs in the 25% most deprived nationally<sup>6</sup> and is arguably being held back by low levels of skills and educational attainment.



### Education & Skills

The supply of a local labour pool with the right mix of education, skills and qualifications is arguably the biggest constraint facing the Crawley economy. This is clearly evidenced by local and regional policy and strategy. For example, the West Sussex Economic Action Plan identifies explicit “labour shortages” and “educational skills deficiencies” (p6). Despite the presence of higher value sectors, the Gatwick Diamond Strategy identifies how, “a lack of adequate workforce skills is a barrier to business investment particularly inward investment” (p16).

In future years, it will be vital to equip local people with the education and skills to be able to access employment opportunities arising from economic growth; this has a very clear fit with social inclusion and sustainability agendas. This starts with Crawley’s population of children and young people.

### Lagging school age attainment...

There is a significant school age attainment gap between Crawley (and the urban coastal strip) and the rest of West Sussex. In particular, the proportion of KS4 pupils achieving 5 or more GCSEs at grades A\* to C (and A\* to E) lags behind the sub-regional and regional average by some way. There have been marked improvements in GCSE level attainment in recent years, although this uplift has occurred from a low base.

### Low employment aspirations...

The lagging school age attainment is closely related to the low employment aspirations among the resident population, which are strongly evidenced in local policy and strategy. As discussed above, the employment rate in Crawley is high but this masks the conditions of this employment; most people have jobs but many of these are low skill and/or low wage. The level of economic under-activity has been compounded by: the easy supply of vacancies at Gatwick Airport and within related industries; lower than average participation in work based learning; and a relatively high concentration of adults with basic skills needs in literacy and numeracy – notably higher than the other five districts in the Gatwick Diamond area; and migration trends increasing the demand for English as a Second Language (ESOL) provision among the Eastern European community<sup>7</sup>.

The Gatwick Skills Centre, which opened in January 2006 and is managed as a joint partnership between Central Sussex College, British Airways (BAA), West Sussex Economic Partnership, Jobcentre Plus, Sussex Enterprise, the South East of England Development Agency and the Learning and Skills Council. Important step in promoting workplace base learning, to encourage employers to invest in the professional development of their staff.

### But relatively few people with no qualifications...

The share of working age residents with no qualifications (10.0%) is in line with the regional average (10.1%) and four percentage points below the national average (14.1%). However, ward level analysis reveals that more than a third of residents aged 16-74 have no qualification at all in the Crawley wards of Tilgate and Langley Green (adjacent to Manor Royal and incorporating Gatwick Airport).

### Low overall levels of higher skills...

Despite a fairly low proportion of working age residents with no qualifications, there is a very clear shortage of medium and higher level skills in the resident population. There is substantial intra-regional disparity here. According to the Gatwick Diamond Strategy, 9 out of 10 wards in the Gatwick Diamond Strategy with the lowest share of NVQ4+ qualifications are located in Crawley; the district has the lowest proportion of residents qualified to NVQ4+ compared to all other districts in the region. Table 1-23 highlights the low levels of higher skills in Crawley’s resident population. The proportion of working age residents qualified to NVQ 3+ and NVQ 4+ lags behind West Sussex, the South East and England by several points. In 2005, Crawley would have needed:

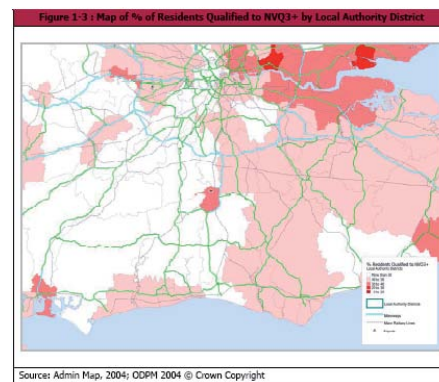
- 4,700 more residents qualified to degree level or above to meet the England average
- 6,800 more to be on par with the South East - more than 10% of the population

	Proportion of working age residents with no qualifications	Proportion of working age residents qualified to NVQ 3+	Proportion of working age residents qualified to NVQ 4+
Crawley	10.0%	38.1%	18.4%
West Sussex	8.1%	46.5%	25.2%
South East	10.1%	48.6%	29.1%
England	14.1%	44.7%	25.9%

Source: Annual Population Survey/Labour Force Survey NOMIS © Crown Copyright.

This is a problem that relates closely to the high volume of higher skilled in commuters.

This is confounded by the absence of any higher education provision in the area. The need for which is highlighted in the Gatwick Diamond Strategy and SEERA’s draft South East Plan.



Moreover, there are sector-specific skills shortages and gaps, for example in the retail industry, that are holding Crawley back. Sharp growth in retail employment is predicted if the Town Centre North development goes ahead as planned. Local people will need to acquire complementary skills to benefit from these job and career opportunities. Upskilling local people to enable them to apply for these posts will be a significant challenge but one which must be overcome if local residents are going to take up the new employment opportunities created.

### Key Messages

Both existing economic trends and regional economic development policy suggest that Crawley is set to consolidate its position as a regional business hub, driver of the West Sussex economy and central component of the Gatwick Diamond area. Locational advantages have played - and will continue to play - a key part in this success. In many respects, the Manor Royal area of Crawley is already an economically vibrant location and the real challenge is to maintain this growth in a ‘sustainable way’<sup>8</sup> - this includes increasing the volume and value of local employment.

The overall growth prospects for Crawley and the wider Gatwick Diamond are good and this could bring considerable benefits for Crawley as a focus for higher value activity. The benefits of the Town Centre Economic Visioning exercise should also be realised in future years, leading to physical transformation, a rapid growth in retail employment and lower levels of worklessness. Critically, this should also help to improve Crawley’s external image and perceptions that have been held back in part as a result of its development as a New Town.

Crawley’s economy currently under performs relative to the South East average across a number of key economic

indicators. There is clear evidence of a two tier economy in which residents with no qualifications and lower skills are unable to access employment opportunities, or work in lower value employment, characterised by lower wage, temporary, part-time shift work. The fairly buoyant overall outlook should not mask four important and related challenges:

- Firstly, the ongoing contraction of manufacturing activity and flight to lower cost locations abroad, illustrated by recent job losses.
- Secondly, the low levels of higher skills in the resident population and the clear mismatch between skills supply and demand.
- Thirdly, Gatwick Airport provides an important economic stimulus in West Sussex and its importance to Manor Royal cannot be underestimated. It also affords Crawley status among employers, employees and investors. However, there is a potential over-reliance on the Gatwick supply chain and a parallel need to diversify the local economic base to provide higher value employment opportunities and protect Crawley from potential economic shocks.
- Fourthly, there is a very real risk that the speed with which Crawley's economy is growing will deepen existing problems around the high level of in-commuting, skills shortages and gaps, and the pressures on land for both housing and development. These are key threats to Crawley's economy which are highly relevant and must be considered in the improvement of Manor Royal.

## Foot Notes

- 1 The Gatwick Diamond is a business led, joint venture by the Surrey and West Sussex Economic Partnerships to facilitate and coordinate the actions necessary to maintain strong economic growth in this area. Crawley is located at the central point of this diamond-shaped area, which stretches from Croydon to Brighton.
- 2 The Knowledge Based employment group includes the following SIC based sectors: Oil & gas extraction (SIC 11), Publishing, printing, reproduction of recorded media (22), Manufacture of petroleum/nuclear fuel (23), Manufacture of chemicals and chemical products (24), Manufacture of office machinery and computers (30), Radio, TV & equipment manufacture (32), Manufacture of medical, optical and precision instruments (33), Manufacture of other transport equipment (35), Supply of electricity & gas (40), Water supply (41), Air transport (62), Financial intermediation (65), Insurance services (66), Other financial services (67), Real estate activities (70), Computer and related activities (72), Research and development (73), Other business activities (74), Activities of membership organisations (90) and Recreational, cultural and sporting activities (92).
- 3 The Aviation Cluster is defined by the following 4-digit SIC based sectors: 6210: Scheduled air transport; 6220: Non-scheduled air transport; 6323: Other supporting air transport activities; and 6330: Activities of travel agencies and tour operators; tourist assistance activities not elsewhere classified.
- 4 These assumptions are based on South East of England Development Agency (SEEDA) 2005 estimates derived from 2003 ONS data.
- 5 The following National Statistics Socio-Economic Classifications (NS-Sec) have been used here: Class 1-1: Large Employers and Higher Managerial Occupations; Class 1-2: Higher Professional Occupations; and Class 2: Lower Managerial and Professional occupations.
- 6 Note: The 18 Super Outputs Areas include the six wards of Broadfield South, Broadfield North, Ilfield, Bewbush, Tilgate and Langley Green.
- 7 Source: Learning and Skills Council Sussex (March 2007) LSC Sussex Annual Plan 2007-2008, p6 & p10
- 8 West Sussex County Council (2004) West Sussex Action Strategy and Action Plan, p6



# SWOT Analysis

## Introduction

A SWOT analysis was conducted to determine what the Strengths, Weakness, Opportunities and Threats were facing Manor Royal at present. The analysis looked at the key areas of the study, including the economic and physical/planning issues. These aim to sum up the findings of the Baseline, and are used to inform the creation of the Vision and Strategy in Section Three.

## Strengths

- Economic strength/bouyancy of Manor Royal
- The high quality of elements of landscaping, trees and vegetation in the public realm
- Some private sites have good quality landscaping and significant green elements
- Some sites are characterised by high quality architecture
- Economic pull of Gatwick
- Location between London and Brighton
- Proximity to Gatwick as a transport hub
- Existing high quality premises
- Strategic location with Gatwick Diamond
- Proximity to neighbourhoods and local workforce
- Growth in highly skilled workers including local residents
- Well established private-public partnerships, such as Local Economy Action Group

## Weaknesses

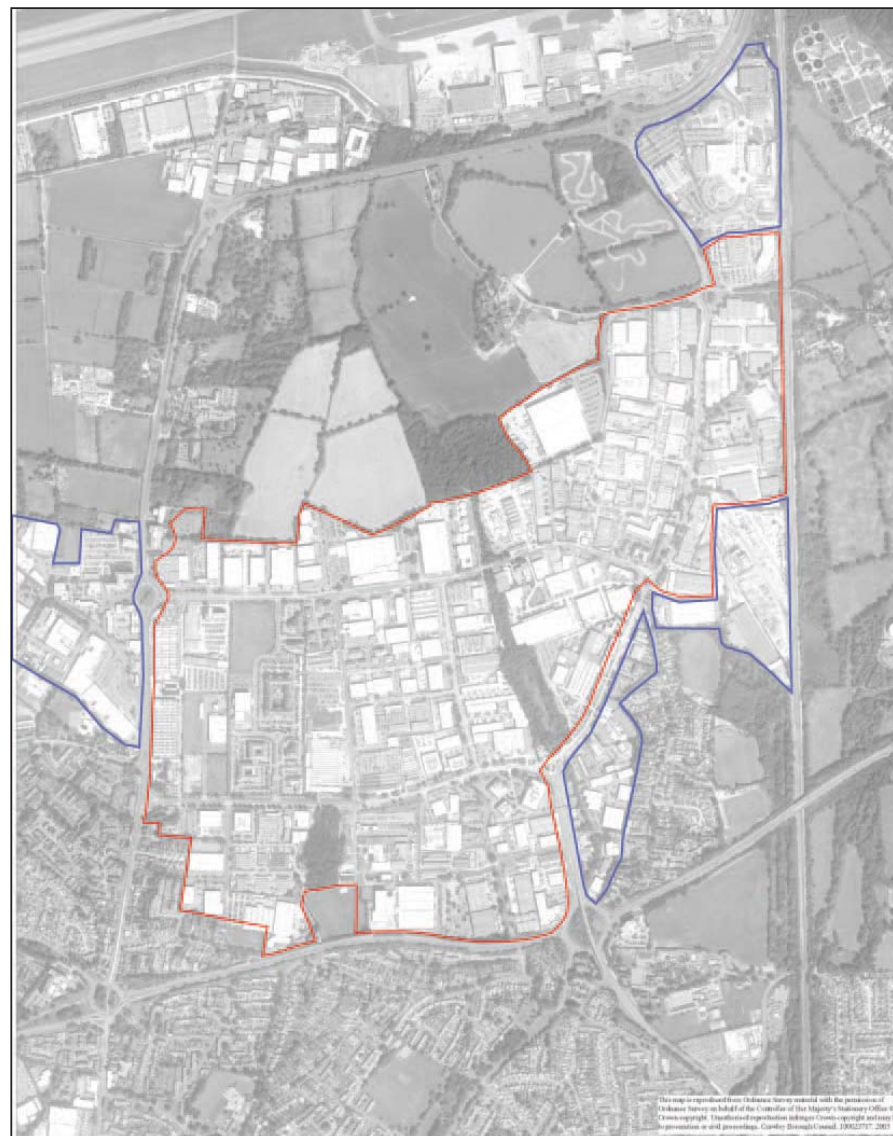
- Limited supply of underdeveloped land
- Lack of skills, and significant incommuting
- Areas with parking problems and dependence on private vehicle use
- Lack of retail and amenity areas in Manor Royal
- Reliance on Gatwick
- Fragmented land ownership
- Lack of uniform and recognisable 'identity' and 'brand'
- Poor signage
- No wayfinding strategy
- Lack of premises and support for SME's / start up business
- There is no emphasis on sustainable transport and promoting the continued use of Travel Plans
- Cycle and pedestrian environment is poor
- Lack of existing partnerships and relationships between key stakeholders, businesses and organisations
- Lack of inward investment
- Some elements of the public realm/landscape environment are poor
- Little public land holdings in Manor Royal core

## Opportunities

- Economic pull of Gatwick
- Policy initiatives; Gatwick Diamond, RSS and CBC LDF
- Development of a European link through Gatwick
- Development potential of older sites
- Significant public land ownership in County Oak
- Financial and political power that large businesses in Manor Royal have to facilitate improvements/change
- Potential education/training link
- Development of Travel Plans and Sustainable Transport modes
- Physical location between London and Brighton

## Threats

- Loss of land to non-industrial uses
- Large businesses dominate market
- Over-reliance on Gatwick as an economic generator
- Manor Royal is not a strategic/regional priority for funding/regeneration
- Lack of existing partnerships and relationships between key stakeholders, businesses and organisations









# SECTION THREE:

# MANOR ROYAL VISION & STRATEGY



# Manor Royal Main Challenges



Figure 3.1: Gatwick Airport



Figure 3.2: A good supply of labour is essential for businesses, Banco Santander, Madrid



Figure 3.3: Integrated public transport infrastructure as part of economic development, Birchwood Park.



Figure 3.4: 'Blue Chip' businesses in Manor Royal

## Introduction

Following on from the baseline work contained in Section Two, and having regard to the strengths, weaknesses, opportunities and threats outlined, a number of key priority areas for change have been identified. This section of the report outlines what these priorities are, with specific actions identified to address each headline.

To unify these priorities and actions under the Manor Royal Strategy, a Vision has been created. Whilst not intended as a statement to be adopted by the Council, it is intended to provide a broad strategic guide to the direction of travel for Manor Royals future.

### Manor Royal Vision:

*One of the most competitive business locations in the South East, offering dynamic, knowledge-based businesses all of the ingredients for successful, sustainable growth and diversification in a well designed green environment.*

## Manor Royal – Economic Challenges

### The Benefits of a Manor Royal Location

The extensive consultation process undertaken as part of this assignment which covered both public and private stakeholders highlighted a number of key factors influencing business's decisions to locate at Manor Royal. These factors include the following:

- A high quality labour pool available within a reasonable travel to work area;
- Good transport links (road and rail);
- The fact that Crawley is essentially a '360 degree' town - i.e. easily accessible and with major markets in all directions (including ease of access to London);
- Proximity to Gatwick Airport;
- Profile - a large number of 'blue chip' companies have located in the Manor Royal area, in particular professional services which regard it as a prime location to serve Kent and Sussex and much of the South East.

Key Challenges for Manor Royal Business Park  
Despite its obvious benefits, consultations with local and regional business support organisations, public sector bodies and companies located on the Manor Royal Estate have highlighted a number of challenges that need to be addressed if Manor Royal is to maintain and improve its position as one of the prime business locations in the South East. These challenges are summarised below.

### Improving the Property Offer

The lack of available prime office accommodation was highlighted as a threat that could partly undermine the success of the Manor Royal Business Park. Property agents report that there is limited Grade A office accommodation in the Gatwick/Crawley area but there is approx 560,000 sq

ft of older stock available (12.5% of total build stock). It was reported that, recently, Roche and Legal & General chose not to locate at Manor Royal specifically because of the lack of suitable accommodation. Other main reasons for companies rejecting the Crawley/Manor Royal location (including the Gatwick Airport and surrounding area) are high staff costs (up to one third more expensive than mid-Sussex) and the tight labour market (very low unemployment).

The need for a social or retail heart for Manor Royal was also highlighted by most consultees as a means of improving the estate. There was considerable support amongst consultees (Both business and public sector) for the development of a retail parade incorporating potentially a local delicatessen, restaurant, pub, dry cleaners, possibly a gym, a newsagent and possibly a small local supermarket.

Many businesses and public bodies were also concerned by the external perception of Crawley as a 'tired' 1960s business location and many of the consultees mentioned the poor image in certain parts of Manor Royal created by low quality 'sheds' and unattractive, older property stock. Manor Royal has very specific boundary constraints and if the objective is for a competitive business location attractive to knowledge based businesses, then the presence of this type of accommodation presents an opportunity cost in terms of maximising the area's overall economic impact.

It was suggested that to facilitate increased growth and the expansion of existing businesses, future development and redevelopment should be at a greater density, to compensate for the lack of employment land available generally at Manor Royal.

It should be noted, however, that most of the larger Manor Royal companies interviewed are committed to this location and are investing significant sums in the upgrading and redevelopment of their properties. Slough, Woking, Leatherhead, Guildford, Brighton and Croydon were widely regarded by businesses as the areas in closest competition to Manor Royal as a prime business location.

The local property agents most active in the Manor Royal Estate (Vail Williams and Stiles Harold Williams) report that demand for the Manor Royal location is now coming primarily from outside the area; 10 years ago, 90% of demand was from companies located within the Crawley area. A great deal of demand is coming from companies in the professional business services sector (e.g. Grant Thornton, PWC, Deloitte, etc) and from the regional offices of legal firms who want to serve the South East market and be in close proximity to the airport and London. It is reported that Manor Royal is also starting to see some degree of clustering by pharmaceutical and oil related companies.

Properties on Manor Royal Estate are primarily owner occupied or owned by institutional investors and office rents

are about £24/25 sq ft, general industrial space £8 sq ft and small industrial units £11 sq ft. The lack of new industrial development opportunities in the Gatwick/Crawley region continues to thwart occupiers' desire for quality new accommodation. The trend is continuing where industrial occupiers have to considerably widen their geographical search outside Crawley in order to locate quality supply and stock.

It was highlighted that the Basepoint development at County Oak (office space provision - 84 units - on short term leases) could be replicated at other locations in Manor Royal to help to diversify the local business base (the Basepoint Manager highlighted that they hope to expand if they can find the land/premises).

There is also a strong view that the redevelopment of town centre north will greatly enhance Crawley, in particular the arrival of John Lewis. The general view is that the town centre and Manor Royal complement rather than compete with each other. That said, few of the 32,000 people employed at Manor Royal appear to use the town centre regularly at lunch time. An issue here is how to spread the economic benefits associated with the growth of Manor Royal to the remainder of the borough.

### Improving the Physical Business Environment

Maintaining and improving the quality of the business environment at Manor Royal and in the wider Crawley area was seen as a prerequisite for a successful economy. The most commonly identified suggestions, from the bodies and businesses consulted, for improvements to the business environment at Manor Royal included:

- Improvements to low quality road verges;
- Addressing the issue of the increasing number of ugly grey/blue concrete barriers (that stop traveller incursions);
- Improving the overall quality of cycle paths in terms of their maintenance and visibility;
- Creating recycling and waste management facilities;
- Improving and increasing vegetation and appearance in some areas;
- Regenerating and improving the appearance and architectural quality of some older properties;
- Improving signage both to Manor Royal and within the area. There are no major 'Welcome to Manor Royal' estate entry points therefore little sense of identity or indeed that one is entering one of the South East's largest and most prestigious business parks;
- Updating estate business maps;
- Improving the condition of some roads.

These views have been directly drawn upon in developing the action areas outlined later in this document

### Maintaining the Business Role of Gatwick Airport

Most organisations and businesses consulted highlighted the fact that the continued viability of Gatwick Airport, both as



a business airport and as London's second airport, was critical to the continued success of Manor Royal. Business consultees in particular were concerned about the transfer of some airlines' operations to Heathrow Airport (e.g. Continental and possibly American Airlines moving scheduled services to Heathrow). The increasing dominance of the budget carrier Easyjet, serving primarily holiday destinations, was not particularly welcomed by businesses.

Although many of the businesses located at Manor Royal had no direct business link to Gatwick Airport, there was a feeling that the local economy could be strengthened by greater diversification from airport related operations and the aviation sector more generally. It was suggested that approximately one third of Manor Royal businesses were directly involved in the Gatwick Airport related economy.

There is also a view that Manor Royal has become much less reliant on Gatwick in recent years; Gatwick employs approximately 27,000 people within the airport boundary. With supply chain employment and the multiplier effect, it is estimated that Gatwick supports around 40,000 jobs). Virtually all businesses consulted supported the development of a second runway at Gatwick but many realised this was becoming less likely and that Gatwick was in danger of becoming London's third airport with the further expansion of Stansted.

#### Addressing Parking and Transport Congestion Issues

The lack of car parking was highlighted as the number one problem by many business support organisations consulted, although this appeared to affect the smaller businesses at Manor Royal disproportionately. Many of the major employers had their own adequate car parking facilities on site.

Virtually all businesses consulted highlighted traffic congestion (caused partly by dedicated bus lane, in particular at junctions) at peak times to be a major issue that needed to be addressed. From 7.45am - 9.00 am and from 4.45pm - 6.00 pm were regarded as the most congested periods.

The continued development of sustainable transport system infrastructure and the maintenance and improvement of transport links to London (including the Gatwick Express) were regarded as crucial to maintain the competitive position of Manor Royal as a prime business location.

The provision of circular bus routes around Manor Royal, in addition to routes through the estate, was suggested as a means of easing congestion, along with the introduction of a park and ride system to complement the Fastway buses. Extended bus routes (both around and through the estate) would mean employees having greater opportunity to be 'dropped off' at a stop close to their business location. Many businesses interviewed highlighted this as a potential benefit. The development of an Estate Travel Plan, possibly based on the successful Ease-It scheme in operation in

Reigate and Banstead, was highlighted by a number of public bodies as being important to help address the transport congestion issue.

#### Tackling the Low Skilled Local Workforce Issue

Many companies interviewed highlighted that they cannot recruit skilled staff locally and that people from the Crawley area tend to fill the lower paid, lower skilled posts. Whilst this may be an issue for the local Crawley economy, most businesses were able to recruit the staff they needed from within a 40 mile catchment. However, many of these staff travelled to work by car, thereby exacerbating the estate's traffic congestion problem.

The concept of developing links with a University campus was proposed (we understand that Central Sussex College and East Surrey College have been looking at the needs of local businesses and how to provide the courses businesses at Manor Royal need). Also the potential to create a University research/management/conference facility at Manor Royal was identified as an opportunity for further investigation.

#### Developing a more effective public/private partnership

All the bodies consulted (SEEDA, SEERA, WSEP, WSCC, Gatwick Diamond Partnership, CADIA, Gatwick and Crawley Chambers of Commerce and the Learning and Skills Council) regard Manor Royal Estate as one of the most strategically important employment sites and economic drivers in the region and the general view is that it is performing well, with its role changing over time from a manufacturing base to a prime office location. The relevant local, sub-regional and regional strategic policies and plans all support the maintenance and 'SMART' growth of Manor Royal. That said, there is very little proposed investment in Manor Royal by any of these bodies at present.

It was proposed that a key public sector role could be to help develop an overall site master plan and strategy to help overcome problems created by piecemeal development. This may require the development of a strategic partnership with landowners.

There may also be opportunities to capitalise on the potential synergies that Gatwick Diamond has created (with resource input from SEEDA and others). Also the partnership of six local authorities (three in Surrey and three in West Sussex) offers opportunities to work more closely - perhaps through the development of a Multi Area Agreement.

# Manor Royal Vision & Priorities

## Manor Royal Vision & Priorities

Manor Royal plays a vital role in the economic development and prosperity not only of the Crawley area, but also of the wider West Sussex sub-region and indeed the South East region. For this reason, it is of fundamental importance that Manor Royal is supported fully as a location and destination for successful, growing businesses.

As noted above, although currently strong on a number of levels, the Manor Royal area also faces numerous constraints and challenges in terms of continuing its role as a key business location of regional, national and even global significance. The strategic framework presented here is designed to both address these challenges and to reinforce the area's existing core strengths.

A 'vision' has been constructed to underpin the strategy for Manor Royal. This is not intended as a statement to be formally adopted by the Borough Council and partners, but is simply presented as a mechanism for containing and expressing a set of strategically linked themes, objectives and actions. This working vision is presented below.

**Manor Royal Vision**

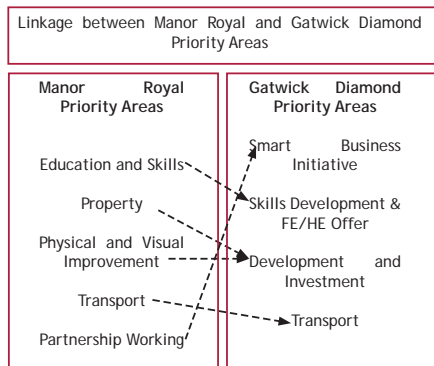
One of the most competitive business locations in the South East, offering dynamic, knowledge-based businesses all of the ingredients for successful, sustainable growth and diversification in a well designed green environment.

Physical Elements	Economic Elements
<ul style="list-style-type: none"> <li>• Design Guide</li> <li>• Local Centre</li> <li>• Densities, Key gateways</li> <li>• Branding</li> <li>• Signage &amp; Wayfinding</li> <li>• Ecology and Landscape</li> <li>• Sustainability</li> </ul>	<ul style="list-style-type: none"> <li>• Skills &amp; Education</li> <li>• Business Community &amp; Support</li> <li>• Property</li> <li>• Transport</li> <li>• Partnerships</li> <li>• Image and Marketing</li> </ul>

Sitting beneath this vision is a set of key action areas, divided into two groupings: physical elements and economic elements. These various action areas are presented separately below. There are, however, clear links across the physical and economic actions. For example, physical and environmental enhancement to the Manor Royal area will improve overall image and perception, thereby stimulating further investment and in turn new employment growth.

### Linkage with other Priorities

The Manor Royal estate sits at the heart of the Gatwick Diamond strategic area - an area that has been identified as highly significant in economic terms by SEEDA and other regional and sub-regional partners. There are clear linkages between the priorities set out within this combined economic and physical strategy for Manor Royal and those previously identified within the Gatwick Diamond Economic Strategy. This linkage is illustrated below:



Many of the priorities for the Gatwick Diamond area are reflected within the proposed priorities for Manor Royal; these key priorities include skills development and education, transport, business development and effective partnership working. In creating linkage between and across these priority areas, a platform can be established for joint working across a broader geography that will benefit Manor Royal directly, but also the wider Gatwick Diamond area.

The priority action areas for Manor Royal are presented below.

### Economic Priorities

#### Skills & Education

Skills development is fundamental to Manor Royal's future as an effective, sustainable location for high value-added, knowledge intensive business. Currently, the Crawley skills base demonstrates a lower share of high level skills and qualifications than the South East regional average. As a result, Manor Royal employers seeking specific types of skills, qualifications or competencies draw personnel from relatively wide travel to work geography, certainly well beyond Crawley. Manor Royal's overall location and ease of access to the area, despite congestion effects, means that Manor Royal is part of a significant labour market covering large parts of West and East Sussex and South London.

If the skills base of Crawley itself can be upgraded, this will result in Manor Royal employers being able to access a higher volume of labour from a more local base. Simultaneously, this will also allow local people to access more of the higher level and higher earning jobs in the area. As such, incomes are more likely to be retained in Crawley and this will generate additional multiplier effects for the local economy. Upgrading the skills base locally will therefore benefit both Manor Royal employers directly and

the local Crawley economy more broadly.

The development of a higher level skills base is also related to the housing offer. Crawley must demonstrate a higher quality housing offer if it is to succeed in improving the residential skills base.

An additional consideration concerns the possible provision of learning facilities on the Manor Royal site itself which may reduce the cost of accessing training and skills development activity and can also offer a platform for the direct delivery of training by local providers. This will also act as a visible mechanism encouraging local communities to upskill and gain new qualifications.

#### Key Actions

- A physical learning facility. Partners should fully explore the feasibility of establishing an FE/HE level physical presence on the Manor Royal estate. A facility that can be utilised by local FE and possibly HE level providers will increase the availability and take up of training generally in the Manor Royal area.

It is very important that any facility fits well within the strategic priorities both of existing employers and existing FE/HE level providers and that a Manor Royal facility adds clear net value to the overall learning offer available. It is also imperative that account is taken of the considerable in-house training facilities and services that some of the key Manor Royal employers will have access to. Any new facility might possibly be developed in line with the priorities that these key employers have for taking skills development efforts forward into the future. Crawley Borough Council should lead this.

- Explore other learning structures that will be needed to support current and future Manor Royal based businesses, to include physical and virtual mechanisms. Building on any existing local initiatives, partners should investigate the possibility of developing further training and learning opportunities that are tied directly to the needs of Manor Royal businesses.

This might, for example, include a skills brokerage web portal that will offer advice to employers regarding access to skills development opportunities and specific training, especially where this might be shared across businesses (and where this is not constrained by commercial considerations). In addition, the development of training outreach support to smaller businesses in the area would also facilitate the uplift required in the local skills base.

- Improving the quality of the local skills base - in order that local people are matched to Manor Royal employers effectively. Alongside any specific training and learning initiatives that might take place on the

Manor Royal site, there must be a broader strategy locally around upgrading the skills base in order that Manor Royal employers can source the skills they need locally and that local Crawley communities will have better access to higher level jobs in the area. This must of course build upon the good work already undertaken across learning providers in the area including schools, but with a greater focus on the specific needs of Manor Royal employers.

- Direct linkage between local education provision and skill needs of Manor Royal employers. This will include the extension and development of any existing mechanisms for linking Manor Royal employers to curriculum development activities. In particular, there is a need to ensure that the training needs of Manor Royal employers are fully reflected in the curricula of training and learning providers.

#### Property

Successful, competitive local economies are characterised by business growth across a diverse range of sectors. Successful business growth in turn requires that the spaces within which this growth takes place are themselves diverse, flexible and plentiful supply. Any constraints in terms of the availability of flexible spaces of different sizes, characteristics and configurations will limit the growth potential of the local business base.

In particular, many areas experience constraints in terms of business 'incubator' space for enterprise start up and in terms of the 'graduation' space needed as businesses attempt to move from the initial start phase to an ongoing growth phase.

The Manor Royal area does exhibit a diversity of business spaces, although a major part of this is comprised of large-scale office or industrial properties. There are many smaller employers, however, around the perimeter and periphery of Manor Royal. Overall, statistical evidence shows that the Crawley economy is relatively more reliant on larger employers than the regional average. A more diverse supply of business spaces is likely to generate a more diverse business base generally in terms of size of employer, thereby reorientating the economy to some extent away from the current reliance on relatively larger businesses.

#### Key Actions

- Managed Workspace - development of appropriate and flexible managed workspace, incorporating business management and support functions. Following the example set by the successful Basepoint facility in the Manor Royal area, provision of managed workspace for small enterprises has been very successful, indicating that there is a latent demand for additional space of this type.

Ideally, managed workspace should be developed to

either include or be within close proximity of support services that stimulate and facilitate sustainable business and employment growth. Additionally, there is a need to ensure an appropriate level of 'follow on' and 'graduation' space is available elsewhere in the local area, so that businesses can be retained within Crawley as they grow.

- Business incubation and enterprise services - stimulating enterprise and new business formation. Development of any additional space for small businesses should be taken forward in conjunction with a broader strategy to support business start up and enterprise activity generally in Crawley. The town currently has a relatively low rate of new business formation (compared to the regional average) and this should be stimulated further again in order to generate a more effective balance of employment across businesses of different sizes.

#### Business Community

Manor Royal is a successful physical business hub, with a clear opportunity to grow and diversify further into the future. The physical enhancement to Manor Royal which is hugely important to the future success of the area must be taken forward in parallel with delivery of quality business support of a non-physical nature. The provision of successful, innovative support processes that allow businesses to start up, grow and diversify in the Crawley area and in Manor Royal in particular, will require provision of and access to the right level of business expertise.

#### Key Actions

- Development of a strong recognisable Manor Royal Brand and marketing strategy. One of the major weaknesses associated with Manor Royal and identified consistently by a broad range of consultees is the lack of a strong, recognisable brand for the area. In developing a more positive image for Manor Royal, physical and environmental improvement will certainly be key. Over and above this, however, is a need to create a strong brand that can be easily presented to potential investors and occupiers. It will be necessary to define the brand fully and to construct a set of strong messages that can be used within a number of key target market segments as well as within an overarching area marketing effort. This brand must then be reflected in the signage and associated physical developments and improvements to the area.
- Appropriate business support & development. Employers in the Manor Royal area and throughout Crawley have access to a set of existing business support mechanisms, including the recently reconfigured Business Link Information, Diagnosis and Brokerage service. It is essential that these existing services are penetrating the local business community effectively and that levels of take up are maximised.

In addition, given the increasing clustering of certain types of activities on Manor Royal and within the wider Crawley area (e.g. aviation, travel, professional services), it is essential that, where possible, business support services are geared towards the needs of businesses in these core sectors. Key support services, particularly for smaller businesses, should include facilitating access to markets, product development, marketing and export management.

- Effective supply chains & procurement. High quality, accessible supply chains and associated procurement processes are vital to maximising the efficiency of a business operation. It will be important therefore to ensure that supply chains are developed fully around the key business functions present on Manor Royal. In so doing, businesses will become more embedded in the area, their cost base will be reduced to some extent and they will be less likely to move elsewhere in response to cost considerations.

Simultaneously, effective supply chains will provide opportunities for other businesses in the Crawley area to benefit from the presence of larger occupiers at Manor Royal in turn creating additional local business multiplier effects.

- Supporting the development of a more diverse business base in Manor Royal that complements activities in the Town Centre. Given the planned developments for Crawley town centre, especially in terms of retail and office space, it is imperative that the Manor Royal area acts as a location that effectively complements economic activities taking place in the town centre. More effective physical and transport linkage between the two areas will contribute positively to this process.
- Business Crime Prevention. Crime related issues are of significant concern to Manor Royal businesses. Actual incidence of crime and fear of business crime together impact on business performance, as well as to the attractiveness of the area to potential investors. It will be important to ensure that businesses collectively develop effective crime prevention strategies and mechanisms that can be shared where possible. Development of a crime prevention strategy for the area will also be critical to galvanising businesses in actions around a common goal. Support services to reduce the incidence of business crime should include collective purchasing and implementation of crime prevention schemes.

#### Transport

Given Manor Royal's location outside of Crawley's immediate town centre and also given the actual scale of the business area, transport and movement are vitally important to future economic performance. Consultation with both local partners and employers has demonstrated

considerable concern with existing transport and movement arrangements. These concerns include access to Manor Royal from outside of the Crawley area, movement within Manor Royal itself, as well as linkage between Manor Royal and the town centre. A number of transport priorities are therefore key to the success of the area into the future.

#### Key Actions

- Bus Routes - extension of existing bus routes to create improved public transport access to and from Manor Royal. An enhancement of the existing routes, in order to offer more frequent services especially between Manor Royal and Crawley Town Centre would be highly advantageous. Circular routes will be particularly important, facilitating access to town centre at key times and creating greater linkage with Town Centre.
- Park and Ride - development of a Park and ride scheme, around Three Bridges station, complementing Fastway bus system.
- Estate Travel Plan - development of an effective Estate Travel Plan, identifying sustainable and convenient methods for accessing and moving around Manor Royal. The development of an Estate Travel Plan is also a useful mechanism for generating collective business and partnership effort around an identified key priority.

#### Effective Relationships

In addition to the priority action areas highlighted above, there are also a number of key priorities around relationships, as highlighted below.

- Gatwick Diamond - there is a need to increase capacity on the part of Manor Royal stakeholders to influence the Gatwick Diamond's strategic priorities and developments and therefore to enhance the economic impact of Manor Royal for the whole of the sub-region and wider region.
- Multi Area Agreement - partners should explore the possibility and potential benefit of developing an MAA type initiative around Manor Royal, involving all relevant local authorities
- Manor Royal and Crawley Town Centre - it is vital that partners - public and private - ensure effective complementarity of strategies for Manor Royal and Crawley Town Centre in order that growth and development is managed in a mutually reinforcing manner.

These issues will be explored further in the following sections.

# Planning and Physical Priorities

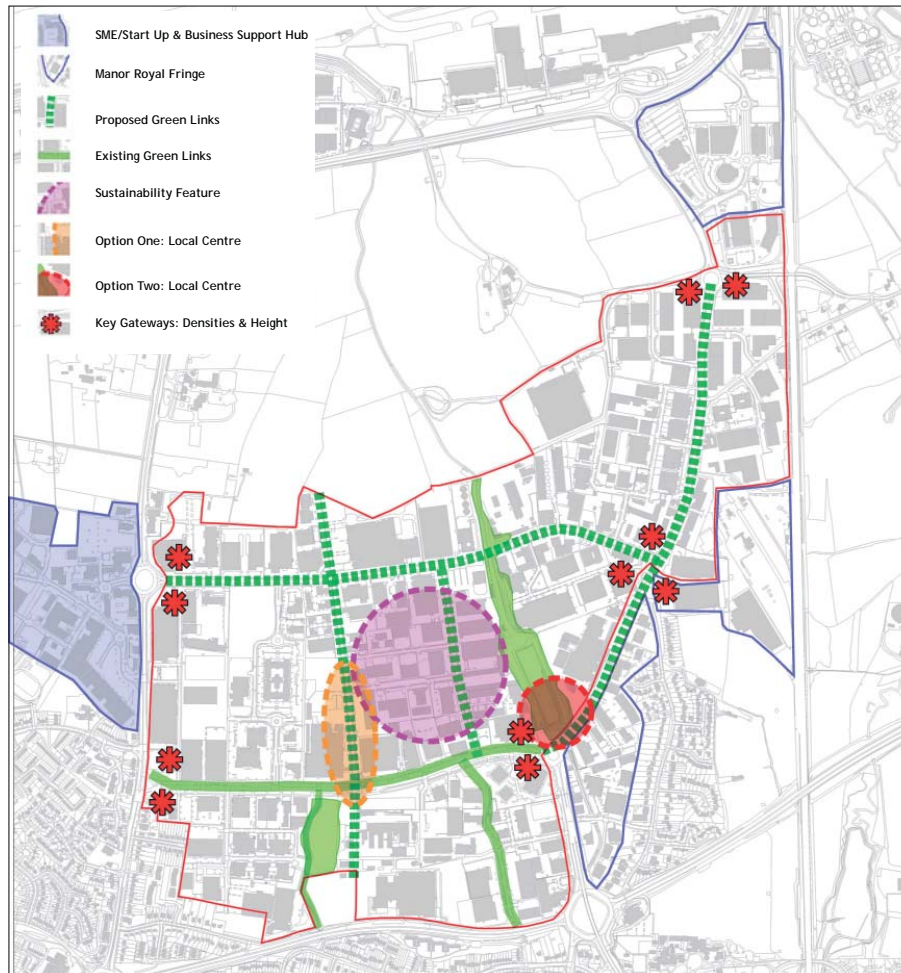


Figure 3.5: Manor Royal Vision

## Vision

The vision for Manor Royal's physical environment is a response to the economic, physical and planning environs. It requires a combined response to address the key factors of success in the physical and planning realm with reference to the strengths, weaknesses, opportunities and threats identified in the baseline, and enabling a high-quality urban environment to be developed which facilitates and supports the economic aspirations for the area and provides a well designed and green environment.

The vision for Manor Royal as outlined previously, is represented in the vision diagram articulated in figure 3.5, which outlines potential areas for change. As touched on previously, there are a number of main design objectives to improve the physical environment;

- Design Guide
- Local Centre
- Gateway Developments; Densities and Heights, and Gateways
- Signage and Wayfinding
- Ecology and Green Routes
- Sustainability
- SME/Start-up Unit and Business Support Hub.

A cross cutting theme explored in all these is the concept of the Manor Royal brand, and the re-branding and brand potential available as part of any changes proposed and implemented at Manor Royal.

## Location

The following section looks at the physical location of the elements within the vision as outlined on Figure 3.5. It also outlines the policy background and justification of need for each element, with reference to the principles, practicality and deliverability of each proposal.



# Local Centre

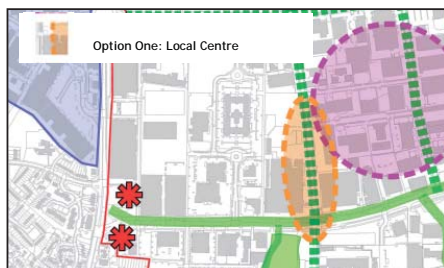


Figure 3.6: Option One, Local Centre

## LOCAL CENTRE

### Rationale

Whilst a small number of these retail businesses do exist, there is no local centre or hub where small retail service providers, shops and facilities have coalesced together. This lack of local services also exacerbates local trip generation, especially car based travel to and from the Town Centre to access these basic services by employees in Manor Royal. A limited provision of non-industrial ancillary and supporting retail uses would not undermine the vitality and continued function of Manor Royal's primary employment and industrial uses.

The rationale for the local centre is based around accepted critical success factors for retail uses as outlined in the British Council for Shopping Centres Report (2001); location, size and type of retail goods. In addition, most retailers now assess the catchment population, style of retailing and physical form (Shopping Environments; Evolution, Planning and Design, P. Coleman, 2006).

The proposed local centres are both located on main through fares within the core of Manor Royal. They also propose uses which are appropriate to the location and proposed catchment (see below), whilst the catchment population draws on both workers within Manor Royal, and residential occupiers immediately surrounding the employment area. The size of the centre should be limited to a number of shops to serve essential uses and capped at a level that does not adversely impact on retail offers in the main town centre. The physical form and style of retailing is discussed below.

The locations also reflects the ability to realistically deliver this facility as either a market driven or Council led venture. The need for such a centre has been highlighted by the business surveys conducted and the audit and assessment of Manor Royal. This evidence highlighted a stark deficiency in the retail and service provision within Manor Royal.

### Uses

Such sites within the local centre would need to demonstrate their use would not erode, prejudice or significantly compromise the industrial/employment function of individual sites, nor erode, prejudice or significantly compromise the function of Manor Royal as a whole. Whilst the location of such uses should be promoted within a local centre, they should not be discouraged from locating within Manor Royal as individual sites. The following uses would be deemed appropriate for ancillary uses within any local centre:

- A1 shops and retail
- A2 financial and professional services
- A3 restaurants and cafés

- A4 drinking establishments
- A5 hot food take away
- D1 non-residential institutions limited to Class XV and non-residential education/training

Other sui generis 'retail' and/or 'employment' uses such as car show rooms, laundrettes and so forth should be considered on a case-by-case basis. Their suitability will need to be assessed having regard to their proposed location, surrounding uses and the characteristics of the intended use. Specific reference should be made to whether or not they are considered to be employment generating uses and suitable for Manor Royal core, or uses suited to the function of a local centre. These uses should not constitute large retailers or wholesale/distribution outlets, which are not deemed appropriate within the Manor Royal core.

### Comparison

A comparative analysis of Manor Royal's retail offer against the benchmark case studies of Slough and Reading (see Section Two) highlights the disparate provision of retail provision compared to the relatively large working population of Manor Royal. This suggests that Manor Royal lacks such a facility which could be supported by the area. It further suggests that the lack of such a facility is undermining the potential competitive advantage of Manor Royal as a location of choice for employers.

### Planning Policy

The need for such a centre has also been heavily influenced by current thinking regarding sustainable communities and sustainable employment/industrial areas, reiterated by national, regional and local planning policy which seeks a mix of uses, including ancillary support services and facilities.

Particular attention must be paid to planning policy as outlined in the Baseline Policy Review. Specifically PPS1, PPG4 and RPPG9 look to deliver sustainable economic developments and mixed-use communities which address the need for social cohesion and inclusion.

The draft RSS, in safeguarding employment sites, promotes a mix of uses including non-employment uses where appropriate, recognising and promoting the creation of sustainable mixed use communities that provide a matched provision of services and infrastructure (social as well as physical) to all new development. The West Sussex Structure Plan seeks to create mixed use communities with the infrastructure, facilities and services required to serve each area.

Locally, the LDF Core Strategy recognises that the release of employment land to facilitate regeneration, social improvement, diversity and complementary uses and facilities may be acceptable. This must not however jeopardise the Town Centre's function as the primary retail area, which clearly sets the focus on small, local service

and retail units, resisting large 'out-of-town' retail parks or a large retail parade in Manor Royal.

Location: Option One

The location of Option One for the local centre is based on the position of a number of older sites that will likely be available redevelopment in the near future. It also draws on an existing parade of shops including the bank, directly south of the option area along Manor Royal road (south side).

The location is central to Manor Royal and being on the main thoroughfare in Manor Royal, it would also benefit from passing trade. The Option One is thus highly accessible by sustainable modes of transport including bus, and would serve the secondary residential market in the adjacent areas. This has the secondary benefit of reducing travel demand by reducing the trip generation to the Town Centre, and promoting sustainable local trips; specifically walking, cycling or catching the bus from within Manor Royal to the proposed local centre.

### Deliverability: Option One

A potential delivery mechanism that requires further investigation and feasibility testing is the concept of a business rate rebate. This mechanism has been successfully implemented in the UK to encourage the provision of services and uses that would otherwise have been driven out through commercial viability and/or inflated land values.

In this scenario, the Council, who control rates, offer a partial rate rebate for any land used for a local centre, such as a small retail or service units. Ideally, these would be single storey units along the primary frontage. Since they are of a smaller scale, the predominant use of the building surrounding the local centre unit remains primarily employment/industrial, with only a portion of the ground floor frontage being occupied by the retail/service unit. This maintains the primary employment/industrial use on site, whilst providing essential space for local centre functions for the community. A small row of single storey units could be provided along Manor Royal road in this manner. Due to their relative size they will be commercially viable for both the shop tenant and the land owner with the additional commercial injection provided by the rate rebate.



Figure 3.7: A3 uses on the fringe of Manor Royal, London Road



Figure 3.8: Retail uses within Manor Royal, Fleming Way



Figure 3.9: Ancillary uses within Manor Royal, Gatwick Road



Figure 3.10: Small Retail Creates a Social Hub, Wimbledon



Figure 3.11: Small Retail below mixed use scheme, Marks & Spencer, Manchester



Figure 3.12: Souther End of Crawters Brook/Ecology Strip



Figure 3.13: Cafes provide active edges, Pescod Square, Boston



Figure 3.14: Option Two, Local Centre



Figure 3.15: Child Care Facilities, West Quay, Southampton



Figure 3.16: Existing Bank and local; Manor Royal road south side

**Location: Option Two**

The second potential location, Option Two, is to the south of the ecological corridor of Crawters Brook. Again, this option necessitates further scenario testing, in particular the environmental implications. Since the requirement of a local centre is minimal in space terms, only a small portion of the southern end of this site would be required. This is also true with reference to the average depth of a small high street style retail/service parade of units, which rely on frontages as the primary selling point, and require less depth in the configuration and internal layout of units. As such, the primary function of the ecological corridor could be maintained with only a small loss of open space along the south edge.

**Deliverability: Option Two**

This option has the added benefit of deliverability given the public ownership of the site, and the ability to quickly implement and deliver a scheme in this location. This does however need to be tested against strategic objectives for the area, and Council priorities for regeneration. The exact mechanism to deliver such a centre may include a land swap or sale subject to the use of the site as a local centre, however this aspect of the option requires further assessment.

The site is also identified as being of high nature conservation importance; however it does not carry any specific planning or statutory designation. Thus, whilst such a proposal would have to prove adequate mitigation and need, there are no resolute barriers to the principle of its partial development in planning terms. Further work would be needed in the form of environmental assessment to determine the potential for development and any impact on the balancing pond within Crawters Brook.



# Heights, Densities & Gateways

## HEIGHTS, DENSITIES & GATEWAYS

### Rationale

As identified within the Baseline Report, and summarised in the Physical Environment and Planning Baseline Summary section of this report, taller, denser, newer and higher quality buildings are emerging around the key gateways, and to a lesser degree, along the main thoroughfares. This is seen as a welcome addition to these locations, especially the primary/key gateways. These buildings afford Manor Royal a sense of place, and are iconic developments that help define and enhance the appearance of Manor Royal when entering and leaving through the key gateways. This is critical in the re-branding of Manor Royal as a sought after employment location.

Given the identified lack of image and identity that Manor Royal currently has, these developments serve a purpose in enhancing these locations as a visible branding of Manor Royal. Whilst this is a welcome outcome, lower height and less dense developments can perform a similar role in branding, identity creation, and defining the entrances to Manor Royal.

Taller and denser developments, whilst also contributing to this 'sense of place' have the added benefit of providing for the identified lack of expansion potential due to the limitations of currently developable land within Manor Royal, and the constraints to further expansion from the location and physical constraints that enclose Manor Royal. As such, increased densities, and increased heights in appropriate locations, offer a potentially viable solution to this need for growth and expansion, and limited supply of land. These would need to be accompanied by high quality designs, including landscaping, architecture and urban design, which also contribute to the creation of a sense of place. Public art, on or off site, can also contribute to the landmark qualities to be established at the key gateways.

This has to be balanced against the understanding that taller and denser developments are likely to be office/head quarter style buildings, whilst lower less dense buildings are predominantly traditional industrial uses. The labour, transport and other infrastructure and resource pressures individual developments may place on Manor Royal need to be taken into consideration in land use planning decisions.

### Planning Policy

PPS 1 seeks to promote sustainable development by promoting efficient use of land through higher density in suitable locations. RPG9 reiterates this, stating wherever possible, the intensification of use on existing sites should be encouraged in employment areas. The South East Plan draft also seeks to increase the intensity of the use, as does the West Sussex Structure Plan, which seeks to secure such development through enforcing minimum densities in applicable locations.

At a local level, the LDF Core Strategy seek increased densities by promoting intensification of employment sites which are in appropriate locations. Again, the appropriateness of such developments needs to be assessed on a case-by-case basis to manage the demand they place on infrastructure and resources in Manor Royal, and the wider Crawley sub-region.



Figure 3.17: Internal functions, National Physical Laboratory, Teddington



Figure 3.18: Density does not always equal greater height, Roche Headquarters, Welwyn Garden City



Figure 3.19: Exemplar taller and well designed elements along Gatwick Road, Manor Royal

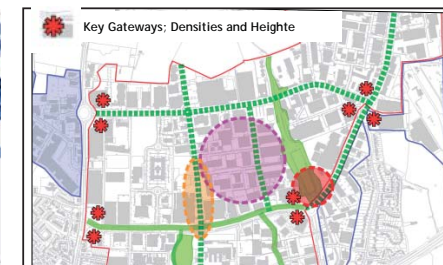


Figure 3.20: Option Two, Local Centre



Figure 3.21: Exemplar design for industrial buildings, National Physical Laboratory, Teddington



Figure 3.22: Exemplar taller and well designed elements along London Road, Manor Royal



Figure 3.23: Exemplar design for industrial buildings, LifeScan Scotland, Inverness



Figure 3.24: Exemplar design for industrial buildings, Thomas Crosbie Holdings, Weblink Manufacturing Facility, Cork



Figure 3.25: Exemplar design for industrial areas, Royal Bank of Scotland Call Centre, Southend

### Locations

Focusing increased densities of development primarily around the key gateways within and on the fringes of Manor Royal, with secondary emphasis along the main routes of Manor Royal and Fleming Way, and the fringe routes of Gatwick Road and London Road is recommended. These are suitable sites for such developments, having regard to such aspects as their design context, accessibility, location and setting. This does not preclude the location of such developments in other locations within Manor Royal, but seeks to focus and promote such development in these key areas.

Potential sites for higher densities include Manor Royal, Fleming Way, Gatwick Road and London Road, and at the key gateways of London Road/Fleming Way (all sides), London Road/Manor Royal (north-east and south-east sites only), Gatwick Road/Fleming Way (all sides) and around the Gatwick Road/Radford Road roundabout (south west, south-east and north-east sites only), as illustrated on figure 3.5. Such developments must be of a high urban design and architectural quality, including landscaping, which reflects their visible and prominent location.

Since denser developments are most likely to be office and headquarter style buildings and uses, and to preserve an appropriate mix of industrial uses, their location should be contained to these identified sites. Promoting higher densities, and the inherent promotion of office/headquarter uses needs further feasibility testing against the emerging policy for the Town Centre and Town Centre North, and the role and relationship each area has in the supply of office space within Crawley and the sub-region.

This is also true of the impact such developments place on infrastructure and resources including trip generation and labour supply. Regardless of this, the potential locations for higher density developments within Manor Royal remain at these key gateways and along the identified primary roads. Any development proposals for these sites should take into account all the relevant factors in determining the appropriateness of taller and denser developments.

With this in mind, it is equally important to retain and promote the development of lower density uses, which typically serve more traditional employment and general industrial uses. This ensures that a sustainable mix of uses is encouraged in Manor Royal. Their location away from the key gateways and primary roads should however be sought, and large distribution and warehousing developments need to be assessed on a case-by-case basis in regards to their appropriateness for the Manor Royal core employment area.

Developments around the key gateways must also be of a high urban design, architectural and landscape quality, regardless of the height and density. Whilst taller buildings offer one potential solution to reinforcing, defining and emphasising gateways, lower height buildings can still have a striking impact in such locations.

This is of particular relevance having regard to the need to balance commercial uses and traditional employment and industrial uses to maintain a balanced and sustainable business community in Manor Royal. Whilst historically, these traditional employment uses have been mainly functional in design, innovative and creative contemporary designs are a commercially viable alternative. Such innovative design solutions should be promoted through planning policy and development control decisions, and are further reflected in the design guidance contained in this report.



# Sustainable Feature

## SUSTAINABLE PRINCIPLES

### Rationale

All sustainability considerations must address the triple bottom line of social, economic and environmental sustainability. This section deals with the environmental aspect of this process. A long term strategy for change to the physical fabric is needed which provides Manor Royal with a distinct competitive advantage and which addresses pressing sustainability issues. This will enhance the business and environmental setting by creating an identifiable brand which jointly attracts new businesses and retains businesses over time. In combination with the incremental changes to the urban fabric proposed through the Design Guide for Manor Royal, the broader sustainable credentials of Manor Royal need to be at the forefront of the image and brand of the area, and all development that occurs.

- This is best achieved through the combination of:
- Innovative and sustainable building and urban design (detailed in the Manor Royal Design Guide, page 52) and other planning policy documents at a local level;
  - Greening and enhancing the ecology of the physical environment to reflect and purvey the sustainable 'image', including sustainable landscaping;
  - Furthering the wider economic and social sustainability of Manor Royal with a local centre and other initiatives (outlined within this document);
  - Sustainable travel/transport;
  - Creating a central sustainable aspect as a core element within Manor Royal.

All building designs should consider the following in the design to achieve a comfortable low carbon building, and should be addressed in all developments in Manor Royal:

- Heating, cooling, and combined heating & cooling
- Power
- Water
- Passive Design
- Natural Ventilation
- Infrastructure
- Renewables
- Façade Design
- Sustainable Construction
- Energy Management
- Vernacular Design
- Sustainable Material
- Waste
- Sustainable Transport

These are outlined within the Design Guide.

The central sustainable aspect could take the form of a local energy centre, which would supply a portion of Manor Royal's energy through sustainable technologies/resources. This could be from a CHP/CCHP facility. Further aspects could include the collection and use of waste or wind.

### Comparison

Referring to the comparative benchmark sites of Reading Green Park and Slough Trading Estate, it is clear that these sites have used sustainability, and specifically local energy production as a competitive advantage. This stems from both the marketing and branding potential, but also the long term sustainability and financial benefits that onsite local power generation brings.

Slough Trading Estates has an on site power station, whilst Reading Green Park has the 'Green Park' wind turbine, which generates 3.5 million units of electricity a year and supplies 1,000 homes and local businesses, and saves 3,018 tonnes of Carbon Dioxide, 35 tonnes of Sulphur Dioxide, and 11 tonnes of Nitrogen Oxide. The latter is a key marketing and branding tool for Reading Green Park, as the turbine is highly visible within, and on the approach to the site at 85m tall and with a 70m rotor diameter. Slough Trading Estate has had onsite power since 1920, however recent upgrades moved the facility from coal to wood and fibre fuels. The energy centre also uses other sustainable technologies such as Combined Heat and Power (CHP), heat and steam generation, drinking water supply from bores and by-products. The facility produces 270 GWh of energy, enough to supply all of Slough Trading Estates and King's Norton Trading Estates in Birmingham's energy requirements twice over.

### Planning Policy

PPS1 seeks sustainable development including the protection and enhancement of the environment and the prudent use of natural resources. Specifically, PPS22 (Renewable Energy) seeks to promote the utilisation of

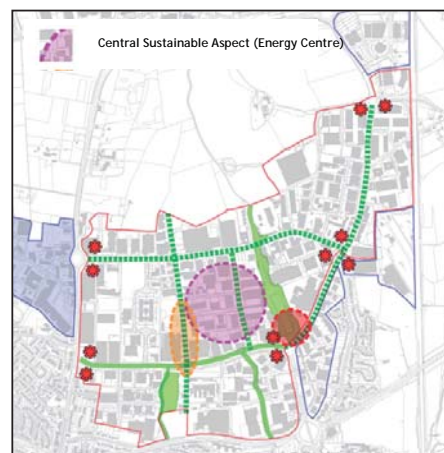


Figure 3.26: Location of potential sustainable feature

renewable energy technologies where appropriate. PPS22 states: "local planning authorities and developers should consider the opportunity for incorporating renewable energy projects in all new developments". PPS22 seeks 10% reduction of overall CO2 emissions from on-site renewable energy, and is applicable to all developments over 1,000 sqm in England and Wales. Other policy considerations include Kyoto Protocol, DTI Energy White Paper, Our Common Future, EU Energy Performance of Buildings Directive, Building Regulations, Energy Performance of Buildings Directive and the emerging Climate Change Bill. Location

Sustainable building and urban design, landscaping



Figure 3.27: Reading Green Park wind turbine, branding and sustainability as one

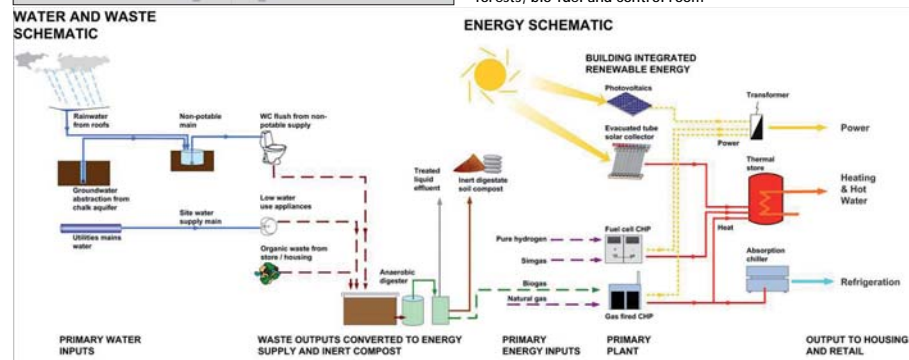
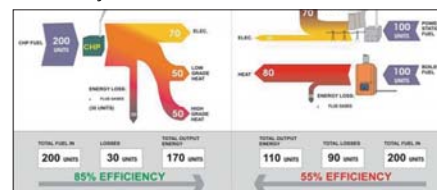


Figure 3.29: Energy Strategies, CHP plans and passive building design energy modelling.

(including biodiversity and ecology), sustainable travel, and economic and social sustainability principles should be applied to all developments within Manor Royal. The central sustainable aspect for Manor Royal (such as a CHP/CCHP energy centre) would best be located in a highly visible and central location, close to the core of Manor Royal to create a strong brand and offer based around sustainability, and to be practical and efficient. Figure 3.26 shows the potential location for such a feature, although it is recognised that dependent on the technology and system employed, amongst other issues, the final location will need to be determined at an appropriate time and after feasibility testing and studies.

### Implementation

It is anticipated that CBC would need to take a proactive approach to bring such a proposal forward, due to the complexities and characteristics of Manor Royal (such as fragmented ownership) and those inherent in the delivery of such large infrastructure projects. Further feasibility testing and detailed studies will be required to determine the viability of such a development as a CHP in Manor Royal, the most appropriate location, and options for delivery.



Figure 3.28: Slough Trading Estates energy centre, renewable forests, bio-fuel and control room

## Landscape & Ecology



Figure 3.30: Landscaping elements, Birchwood Park



Figure 3.32: Buildings with an active and positive relationship with ecological elements in their context, Marks and Spencer Financial Services, Chester



Figure 3.31: Trees and green edges defining access ways in an attractive pedestrian friendly environment, Walthamstow Town Square and Gardens

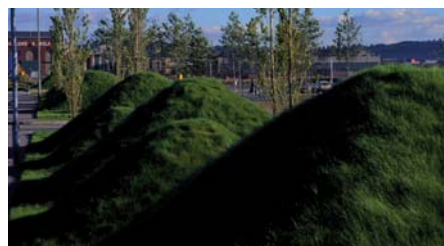


Figure 3.33: Innovative landscaping to verges at Clarendon Dock, Belfast



Figure 3.34: Landscaping elements creating interest and of ecological value within the private/public realm, Birchwood Park

### LANDSCAPE AND ECOLOGY

#### Rationale

As part of the physical proposals, improvements to the landscape and ecology of Manor Royal are seen as an integral part of the overall vision. Improved and enhanced 'green' areas are a key branding point and articulate the sustainability credentials of the area. Improvements to the environment result in an improved image of Manor Royal as an attractive landscaped industrial park.

The audit and assessment on site also revealed that the east of Manor Royal road, and the south of Gatwick Road were not of the same landscape quality as the west and north of these roads respectively. Furthermore, Fleming Way, the secondary east-west route in Manor Royal was not characterised by an attractive environmental and landscape quality. The same is true for the two secondary north-south routes of Faraday and Newton Roads.

#### Planning Policy

PPS1 seeks to provide attractive environments as part of the provision of sustainable communities, and addresses the protection and enhancement of the environment as a core value. RPG9 seeks a higher quality public realm, and the need to provide a quality physical environment to stimulate a buoyant economy. The Vision for Crawley looks for the borough to provide an attractive environment with green spaces and attractive and well maintained streets.

The draft RSS recognises that the quality of the environment is a key driver of regeneration, which is reiterated by the West Sussex Structure Plan. The draft LDF Core Strategy and the current Local Plan also place environmental improvements at the forefront of regeneration and development, including the key requirement for green edges, spaces, and corridors. Improved landscaping along highways and well landscaped car parks are specific requirements, whilst general high environmental quality, appropriate landscaping and design is promoted.

#### Location

As discussed previously, the key primary and secondary routes are targeted for improvements to their environment and landscape quality. This not only addresses issues of biodiversity and ecology, but promotes the main thoroughfares and access points as high quality and green spaces.

This reflects the sustainability branding of Manor Royal and promotes a green image. Whilst all developments should be well landscaped and meet the design principles outlined in this document, particular attention should be given, in these main routes, to providing a green edge and interface

between private developments and the public realm.

The existing ecological corridor and the green cycle links should also be retained and enhanced as important habitats and green spaces. Work to promote on site landscaping and open space should also be sought, especially for development which is adjacent to the ecology strip.

#### Comparison

Reading Green Park has at its core a landscaped lake and woodlands. These features are linked to the main employment uses by dedicated cycle and walking paths, with ancillary retail and cafes set within this character area. This has become a major branding and point of differentiation at Reading Green Park. It is considered, that given the existing green aspect at Manor Royal, that further works to the landscape and ecology would strengthen the 'green' image of Manor Royal and could be used as a distinctive feature of the area. It would also complement and articulate the sustainable feature proposes and advertise the credentials of the location.



Figure 3.35: Proposed and Existing Green Links



## SME, Managed Workspace & Business Support Facilities

### SME, MANAGED WORKSPACE AND BUSINESS SUPPORT FUNCTIONS

#### Rationale

As discussed previously, there is an identified need for managed workspace and support facilities to help progress the diversification of Manor Royal, especially in regard to SMEs and start-up businesses. This is also demonstrated by the high demand for the existing hub within the fringe of Manor Royal in County Oak, where a facility comprising the Diamond Enterprise Hub, the Enterprise Centre and Basepoint Business & Innovation Centre operates. These organisations are supported by a variety of private and public bodies, and provide small business/workspace units at low or subsidised rents and on short leases. They also offer business support functions focused on the needs and development of small and emerging businesses in the area, and improving business skills for new businesses.

#### Planning Policy

PPG4 has a strong emphasis on promoting small and medium sized firms, recognising their role in continued sustainable economic development. RPG9 reiterates this and the role that such business play in diversifying markets and reducing dependencies. The draft RSS seeks high quality sites for start up and micro-businesses to support the growth of existing local businesses, and to attract high value-added inward investment. Specifically, the RSS looks to reduce dependencies on Gatwick Airport. This is also true of the West Sussex Structure Plan. Locally, the draft LDF Core Strategy and adopted Local Plan both seek to provide support facilities for businesses and provide suitable space for smaller employers and promote diversity through new business start up.

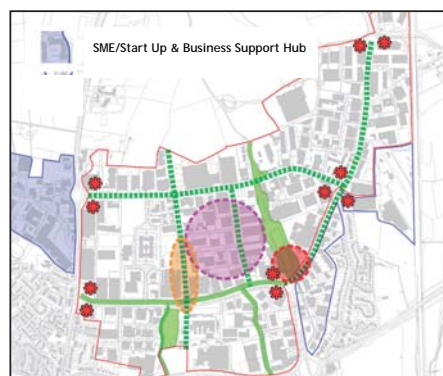


Figure 3.36: SME/Start Up & Business Support Hub

#### Location

The potential to expand this provision of SME/incubator and support facilities in the County Oak area with regards to its physical presence and size, and functionality, is considered a significant opportunity. This location has greater deliverability given the large public land holdings of both CBC and WSCC within this area and the existing provision, which offers functions to expand and build upon. The potential design of such a facility as a multi-purpose flexible space would complement a myriad of potential uses and support the incidental patterns of use inherent to SME/start-up units, business skills, training and support, and potentially formal education facilities. As such, there is the potential to incorporate any proposed education and skills development function within this collective hub, although this would require further feasibility testing with service providers.

#### Comparison

Reading Green Park features a Regus centre, which offers flexible and short term rentals to businesses looking for office space. The Reading facility offers similar core features to that of Basepoint in Crawley, but without the Governmental and partnership support that Basepoint receives. In this regard, it is a purely commercially driven centre and the Manor Royal location offers greater support and services.



Figure 3.37: Well designed and located buildings which provide flexible space and a myriad of services to different organisations, Alba Campus, Multiple Occupancy Building, Livingston



Figure 3.38: Basepoint premises, Manor Royal Fringe

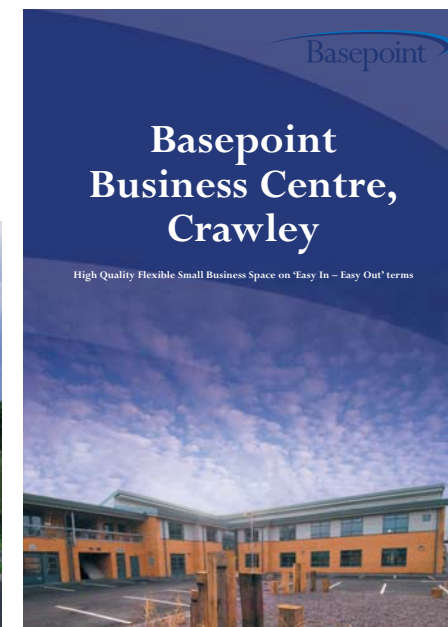


Figure 3.39: Basepoint Business Newsletter

# Design Guide



Figure 3.40: Well designed pedestrian access with strong green edges at the Civil Aviation Authority, Swanwick



Figure 3.41: Strong and active frontages to the Scottish Widows Headquarters, Edinburgh



Figure 3.44: Clear and legible access formed from a strong edge at the research facility for LifeScan Scotland, Inverness

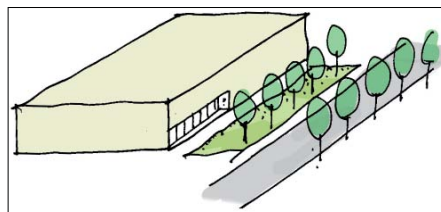


Figure 3.42: The office and/or retail/service component of each building will be required to be located along the road frontage of the building.



Figure 3.43: An innovative solution to a constrained site for Ujoma house, Dar es Salaam, Tanzania

## Introduction

The following design guide is intended to be able to be used as a stand alone document capable of being applied as a best practice reference for the development of further policy, and in making development control decisions. The Design Guide could be progressed to the stage where it is adopted as a Supplementary Planning Document, however more detailed work would be required including public consultation to deliver the Design Guide as an SPD. As such, this guide proposes broad principles relating to design specific to Manor Royal which can be used to inform decisions.

## Design Guide

As part of the wider regeneration, and having regard to potential improvements to the Manor Royal urban fabric, new developments and any redevelopments should all be of high architectural, urban design and landscape quality. This has been highlighted by the current impact the higher quality developments have on the image and branding of Manor Royal, and the impact good design has on the way places function. As highlighted in the baseline audit and assessment, there are deficiencies in the way the urban environment currently operates. This is a direct result of the way a number of sites have been developed on an ad hoc basis, with little regard in design given to the relationship between development and its context, including adjoining buildings, pedestrian routes and transport infrastructure. The lack of a consistent approach and due diligence paid to key principles of urban design, architecture and planning has been problematic in the designs that have emerged within Manor Royal.

Whilst retrospective work to existing sites will allow smaller scale incremental change to individual sites, there is a need for greater change, and the potential exists to inform future development. The following section comprises a broad design guide which aims to provide principles on good urban design and planning. Whilst policy exists at a local level to address good design, there is no specific material which delves further into design principles other than a broad recognition that good design should be sought on all developments. The possibility exists, at a later stage, to expand these design guidance principles to a level sufficient to form the basis of a Supplementary Planning Document. This would give the design principles/guidance due weight in the determination of development control decision, and in informing policy directives.

## Planning Policy

PPS1 seeks high quality sustainable development, with urban design being integral to this, whilst PPG4 looks to reconcile locational demands and environmental influences of any business developments in their design. The Vision for Crawley seeks an attractive environment with green spaces, well maintained streets and spaces and looks at the

transport, sustainability and pollution implications of development. Regionally, the draft South East Plan lists the quality of the environment (including the urban environment), as critical drivers to successful places. The West Sussex Structure Plan reiterates concerns about sustainable transport and the quality of the urban environment. Locally, the LDF Core Strategy identify the quality of employment space as key to meeting local economic objectives, as is environmental and design quality in all development proposals. Specific attention is drawn to green spaces and edges, and the high quality urban, architectural and landscape design and choice of materials. Integral to this is an understanding that high quality design stems from designs and layouts which respond to their development context. Specific reference is also made to designs which respond to the transport network, parking and the cycling and pedestrian environment.

## Design Principles

The following design guide is based on the core design principles and the conceptual move towards developing a sustainable employment/industrial area within Manor Royal which is of a high design quality. Key to this, is an understanding of sustainable design and planning, and reference has been made to planning and design guidance and policy in this regard. In addition, principles have been developed based on the successful implementation of similar design guides in a myriad of industrial and employment areas. The following is based on sustainable design best practice, incorporating social, economic and environmental considerations within integrated design and planning.

## Comparison

Reading Green Park has excelled in its selection and delivery of world class architecture. Business park developments have been designed and built by the likes of Foster & Partners, Nicholas Hare, EPR, Sidell Gibson, RHWL, Scott Brownrigg & Turner, HOK and Tate Hindle on site. These names have been used as a discrete selling point at Green Park, and are part of Green Park's branding and offer. The high quality of architecture, urban and landscape design have given Green Park a sense of place and unique identity as a design-led business park, resulting in international distinction.

Slough Estate demonstrates how a business park can evolve over time to meet new and emerging markets and demands. Whilst once a predominantly functional area, the Estate has redeveloped 30% of building stock since 1990. Further masterplan work is beginning to review both the design and function of the Estate, including better designed and more sustainable buildings and development. This work includes on site sustainable energy production, sustainable transport infrastructure, sustainable social and cultural improvements (cafes, small retail and so forth), and economic and business developments (such as SME, R&D sites), as well as improving the design and layout of the Estate.



## Site Layout Principles

### Objective 1 Development Form

All buildings should be designed to front onto the primary roads and should provide a consistent building frontage that creates a strong and active relationship with the surrounding environment. This will involve incremental change as sites come forward for development. Multiple 'main' frontages may be necessary for corner sites, or large sites with more than one 'main' road frontage or pedestrian access way.

The main pedestrian access to the buildings should also run directly from the primary distributor roads and must be clear and legible.

Consideration should also be given to locating office components to make efficient use of space (such as above single storey industrial uses), and innovative design solutions in this regard should be promoted.

### Objective 2 Plot Layout

The plot layout should be arranged to conceal and reduce the visual, noise and general pollutant impact of parking and service areas, truck turning and any open storage through locating these activities towards the rear of the sites and away from frontages, public access and public spaces.

Plot layout should also have regard to the use and design of landscaping and planting. Proposals should utilise buildings and landscape elements to create an attractive boundary which minimises the use of fencing wherever possible.

Any landscaping strips will be required to form part of an overall landscaping strategy. As such, all proposals should include an overall landscaping strategy which includes details of boundary treatments and types and species of planting. The 'greening' of Manor Royal includes that of public land and that in private ownership, and landscape within sites should have regard to the overall vision for the area to be greener and better treated, reflected in the design of landscaped areas.

Buildings should where possible front onto the edge of the pavement, or be set within small landscape buffers which maintain a strong frontage and consistent building line along the street.

### Objective 3 Infrastructure

All statutory services including information and communication technology networks should be provided within a common infrastructure corridor in any new or significant redevelopments, which allows for future maintenance and expansion.

### Access and Movement

#### Objective 4 Hierarchy of Roads and Routes

Proposals will be required to respond to the network of roads and routes, including cycle and pedestrian ways, in order to extend links from the site to the surrounding area and to the existing road network.

Strong and active edges help define and delineate public and private space, and improve legibility.



Figure 3.45a: Above: The main frontage at Shin Etsu shielding unsightly works to the rear, Livingston  
Figure 3.45b: Below: The same facility viewed from the rear of the site



Figure 3.46: Convenient and well designed bus facilities which directly serve the primary employment areas, Birchwood Park

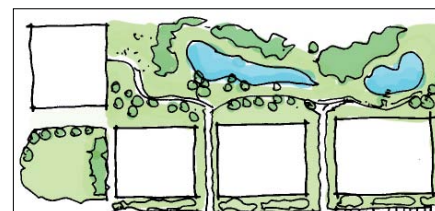


Figure 3.47: Plot layout should address landscaping and building locations in an integrated design approach



Figure 3.48: Innovative landscaping, Clarendon Dock, Belfast



Figure 3.49: Buildings providing a direct and strong frontage onto the public pavement, Caspian Point, Cardiff Bay



Figure 3.50: Well articulated entrances utilising planting and ground surface treatment to define spaces, Smith and Nephew Building, York Science Park



Figure 3.51: A range of passive sustainable building design solutions as part of the overall design



Figure 3.52: Curtain wall photo voltaics as part of the overall design



Figure 3.53: The main road frontage of LifeScan Scotland, with innovative yet industrial design, Inverness



Figure 3.54: Consistent use of high quality and durable materials that suit the industrial context



Figure 3.55: Clear and legible pedestrian routes in a well landscaped environment which does not compromise security at Clarendon Dock, Belfast



Figure 3.56: Secure, covered and passively overlooked cycle storage, Thales, Manor Royal



Figure 3.57: Well designed and maintained cycle and pedestrian routes that run between key nodes and locations in an attractive environment, Birchwood Park

### Objective 5 Pedestrian and Cycle Circulation

A pedestrian and cycle friendly environment within Manor Royal should extend to provide direct and safe links to the three local railway stations of Gatwick, Crawley and Three Bridges, Crawley Town Centre, adjoining residential areas and the existing National Cycle Network. These should be well maintained.

All parking areas should incorporate a convenient and legible pedestrian route to buildings.

All plots should incorporate covered and secure cycle storage space sufficient for employees and visitors.

### Building Design

#### Objective 7 Scale, Form and Location

Proposals will be required to demonstrate how the building's scale, form and location responds to the site context, in terms of primary building frontage and access for pedestrians and vehicles.

Proposals should consider the visual impact of buildings on the main views particularly along the key boulevards of Manor Royal and Fleming way, and the secondary views along Gatwick Road and London Road, and the key gateways of London Road/Fleming Way, London Road/Manor Royal, Gatwick Road/Fleming Way, and Gatwick Road/Radford Road.



Figure 3.58: Details of materials at LifeScan Scotland, with a range of man made and natural materials to complement the industrial context and design, Inverness

The area of built coverage of each plot should be maximised with a target of a minimum of 40% built coverage.

Building heights should be varied across the site having regard to the height restrictions as a result of the limitations imposed from Gatwick Airport, and the surrounding open space and residential uses.

In general, heights should be between 2-7 storeys. Single storey buildings should be avoided. Higher elements will be promoted along the main thoroughfares of Manor Royal, Fleming Way, Gatwick Road and London Road, and at the key gateways of London Road/Fleming Way (all sides), London Road/Manor Royal (north-east and south-east sites only), Gatwick Road/Fleming Way (all sides) and around the Gatwick Road/Radford Road roundabout (south west, south-east and north-east sites only).

Lower density uses should be located away from these main roads and key gateways.

#### Objective 8 Building Design and Detail

Innovative and sustainable building design solutions will be required on all developments.

A consistent and complementary range of building materials and colours should be selected to enhance the character of the development, although innovative designs and materials will be promoted.

Proposals should demonstrate the use of sustainable materials and sustainably sourced materials.



A consistent signage system will be required throughout the development, which must be well maintained. Signage will also be required at all the key gateways, and include wayfinding information and well sighted street signs.

**Sustainability**

*Objective 9 Energy Efficient Design*

All development should be designed to include measures designed to enable the maximum percentage of energy requirements to come from renewable sources.

*Objective 10 BREEAM*

All buildings should seek to meet Building Research Establishment Environmental Assessment Method (BREEAM) 'excellent' standard for industrial buildings to ensure efficient use of energy and resources.

*Objective 11 Water*

Proposals will be required to incorporate Sustainable Urban Drainage Systems (SUDs) to minimise the impact of additional drainage run-off, help attenuate storm-water, and increase biodiversity.

Measures to reduce demand for water will be required to be incorporated into the developments to avoid depleting local water supplies. This can be achieved through supply and demand management and could include rainwater harvesting, grey-water reuse and the use of low-consumption water devices and specification of low water use sanitary ware, as far as possible.

*Objective 12 Waste*

Opportunities for waste avoidance and reduction, as well as sustainable waste reuse, recycling and disposal, will be required to be adopted wherever possible, through all stages of the construction and operation of development.

Waste management strategies will be required to be adopted for all phases of the development of any sites, from construction through to operation. Waste generation in construction and operation activities of any development will be required to be minimised, and priority should be given to repair, reuse and recycling ahead of responsible disposal. Offsite disposal of waste to landfill should be minimised where possible.

Environmentally responsible transport will be utilised wherever possible for waste management, haulage and construction activities.

*Objective 13 Biodiversity*

The biodiversity of Manor Royal will be required to be maintained and enhanced. This can be achieved through creating valuable new habitats and enhancing existing habitats by the creation of new green spaces, using green roofs for some of the building developments and the enhancement of local biodiversity and reintroduction of indigenous flora as part of the landscape planting. Particular attention will be paid to development adjacent to the ecological corridor (Crawters Brook), and along Manor Royal, Fleming Way and Faraday Road, where new and enhanced habitat and green corridors should be promoted along the street.

*Objective 14 Pollution*

Emissions into the atmosphere will be required to be minimised through the adoption of considerate design, best practice construction techniques, and careful maintenance strategies for buildings, facilities and systems to ensure that they operate in an energy-efficient manner.

It will be necessary to ensure that remediation reduces contamination levels to within appropriate health and environmental guidelines. This can be achieved through assessing the potential risk for land contamination throughout the life cycle of the project (construction and operation), and designing out potential risks. Where contamination is found in situ remediation of existing contamination in a sustainable manner shall be carried out where possible (e.g. in situ bioremediation) to avoid removing contaminated material from the site.

*Objective 15 Modern Methods of Construction (MMC)*

Where possible, buildings should be constructed using MMC, which promotes lower energy use during construction, improved build-quality and improved construction safety.

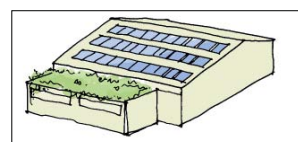


Figure 3.59: Green roofs and skylights as part of building designs



Figure 3.60: Alternative wayfinding displays which are well designed and maintained, Bognor Regis



Figure 3.61: Above & Below; Consistent, durable, clear and well located signage with variations in design at BSKyB New Horizons Court, Middlesex



Figure 3.62: BREEAM ratings can be used as a marketing and publicity tool for businesses looking to place themselves in a unique selling point in today's competitive market. BREEAM on display at Caspian Point, Cardiff Bay



Figure 3.63: Sedum green roofs can provide cost effective biodiversity and improve the outlook of otherwise barren roof spaces



Figure 3.64: Wind turbines can take many forms and can be suited to most industrial sites and contexts as part of on site renewable energy generation as well as branding



Figure 3.65: Simple, clear, informative and well positioned signage at Cathedral Gardens, Manchester

# Implementation and Delivery

## Strategic Actions

Before investigating the various implementation mechanisms at the disposal of local partners, all of the action areas outlined previously are summarised in the table below. In addition, we provide an indication of the priority that should be attached to each action, the possible partners that should be involved, as well as initial first steps in taking these actions forward.

Crawley Manor Royal Strategic Actions			
Economic Development Actions			
Action Area	Priority	Partners	Implementation - first steps
Physical Learning Facility	Medium	Lead: Central Sussex College Other partners: Crawley Borough Council, CADIA, Sussex LSC, WSEP	<ul style="list-style-type: none"> <li>o Undertake review of learning and training facilities within large occupiers on MR</li> <li>o Begin dialogue between local FE/HE providers re appetite for and feasibility of establishing a shared training/learning facility on MR</li> <li>o Undertake initial outline feasibility study</li> </ul>
Other Specific Learning Structures	Medium	Lead: Central Sussex College Other partners: CADIA, Sussex LSC	<ul style="list-style-type: none"> <li>o Initiate a detailed survey of MR based employers' skill needs and current gaps in learning availability related to these skill needs</li> <li>o Initiate dialogue between employer representatives and local learning partners regarding possible development of bespoke curricula and learning models.</li> </ul>
Improve Quality of the Local Skills Base Overall	High	Lead: Crawley Borough Council Other partners: Central Sussex College, SEEDA, LEAG, Sussex Enterprise	<ul style="list-style-type: none"> <li>o Continue work with local partners to improve the overall skills profile of the Crawley residential base.</li> <li>o Increase the role of local employers in acting as mentors and influencers of learning aspirations across Crawley.</li> <li>o Ensure robust linkage between MR based employers and local schools re preparing young people for local employment opportunities.</li> </ul>
Linkage between Manor Royal Based Employers and Education/Skills Providers	High	Lead: Central Sussex College Other partners: CADIA, LEAG, Sussex Enterprise	<ul style="list-style-type: none"> <li>o Configure a task group comprising key partners and a representative selection of MR based employers.</li> <li>o Develop mechanisms whereby intelligence regarding MR employer skill needs can feed directly into FE and HE level curricula. Ensure involvement of local schools in this process.</li> </ul>
Managed Workspace – development of flexible space	High	Lead: LEAG Other partners: Crawley Borough Council, CADIA, WSCC, WSEP, Sussex Enterprise	<ul style="list-style-type: none"> <li>o Undertake full feasibility assessment of proposals for new managed workspace and/or incubation facilities, testing proposed options.</li> <li>o Begin dialogue with potential providers of new managed workspace.</li> </ul>
Business Incubation and Enterprise Services	Medium	Lead: Sussex Enterprise Other Partners: Business Link Sussex, LEAG	<ul style="list-style-type: none"> <li>o Initiate ongoing dialogue with main enterprise support providers to help redesign provision for the local context</li> <li>o Ensure Business Link Business Simplification Programme is tied to needs of MR based businesses</li> </ul>



<b>Crawley Manor Royal Strategic Actions</b>			
<b>Economic Development Actions</b>			
<b>Action Area</b>	<b>Priority</b>	<b>Partners</b>	<b>Implementation - first steps</b>
Manor Royal Brand and Marketing Strategy	<b>High</b>	Lead: Crawley Borough Council, Other partners: LEAG, CADIA, SEEDA, WSCC, WSEP	<ul style="list-style-type: none"> <li>o Configure a public/private task group to consider approaches to development of a new Manor Royal brand</li> <li>o Initiate development of a new marketing strategy for MR based upon an agreed branding and PR format</li> <li>o Commission external marketing and branding experts to advise on a new cohesive brand for Manor royal</li> </ul>
Business Support and Development Services	<b>Medium</b>	Lead: Sussex Enterprise Other partners: Business Link Sussex, LEAG, CADIA, WSEP	<ul style="list-style-type: none"> <li>o Begin to dialogue with local and regional business support providers to ensure that their provision is as fully tailored as possible to the needs of MR based businesses</li> </ul>
Business Crime Prevention	<b>High</b>	Lead: Crawley Borough Council Other partners: Sussex Police, LEAG	<ul style="list-style-type: none"> <li>o Configure a public/private task group to discuss and define key crime and safety related issues for MR</li> <li>o Develop a Crime and Business Safety Strategy in conjunction with Sussex Police (Crawley District) and local MR business representatives</li> </ul>
Extension of Existing Bus Routes	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, WSCC, WSEP	<ul style="list-style-type: none"> <li>o Review data specifically relating to passenger movements between MR and other areas. Identify areas for additional research and intelligence.</li> <li>o Initiate feasibility study of potential new routes serving Manor Royal</li> </ul>
Park & Ride Scheme	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, WSCC	<ul style="list-style-type: none"> <li>o Initiate dialogue with MR based businesses around the possibility of a park and ride scheme. Investigate precise levels of demand for such a scheme</li> <li>o Undertake initial feasibility testing for a new scheme</li> </ul>
Estate Travel Plan	<b>High</b>	Lead: Crawley Borough Council Other partners: LEAG	<ul style="list-style-type: none"> <li>o Configure a group representing local partners and MR based businesses to investigate travel and traffic related issues fully</li> <li>o Develop an initial Travel Plan outline and initiate a wider MR business consultation on the content of the plan</li> </ul>
Effective Relationships	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, SEEDA, WSCC, WSEP, Gatwick Diamond Partnership	<ul style="list-style-type: none"> <li>o Enter into ongoing dialogue with the most relevant partnerships and agencies, in particular CADIA, the Gatwick Diamond Partnership and SEEDA.</li> <li>o Develop protocols for joint working and memoranda of understanding where necessary around common priorities.</li> </ul>

<b>Crawley Manor Royal Strategic Actions</b>			
<b>Action Area</b>	<b>Priority</b>	<b>Partners</b>	<b>Implementation - first steps</b>
<b>Physical Development Actions</b>			
Local Centre	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, CADIA, WSCC	<ul style="list-style-type: none"> <li>o Begin initial feasibility testing in preparation for full physical and financial appraisal of the proposed development.</li> <li>o Configure a task group to take forward full investigation of the development.</li> </ul>
Heights, Densities & Gateways	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, CADIA, WSCC	<ul style="list-style-type: none"> <li>o Partners should seek to proactively influence development in order to enhance the overall appearance of the MR area.</li> </ul>
Sustainable Feature	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, CADIA, WSCC	<ul style="list-style-type: none"> <li>o Begin initial feasibility testing in preparation for full physical and financial appraisal of the proposed development.</li> <li>o Configure a task group to take forward full investigation of the development</li> </ul>
Landscape & Ecology	<b>High</b>	Lead: Crawley Borough Council Other partners: LEAG, CADIA, WSCC	<ul style="list-style-type: none"> <li>o Undertake a more detailed analysis of the requirements for landscape and environmental improvements.</li> <li>o Begin initial feasibility testing in preparation for full physical and financial appraisal of the proposed improvements.</li> <li>o Configure a task group to take forward full investigation of the development</li> </ul>
Managed Workspace Facilities	<b>High</b>	Lead: Crawley Borough Council Other partners: Sussex Enterprise, LEAG, CADIA, WSEP	<ul style="list-style-type: none"> <li>o See above</li> </ul>
Design Guide	<b>Medium</b>	Lead: Crawley Borough Council Other partners: LEAG, CADIA, WSCC	<ul style="list-style-type: none"> <li>o Partners should seek to proactively influence development in order to enhance the overall appearance of the MR area.</li> </ul>

From the previous table, the high priorities are therefore:

- Improve Quality of the Local Skills Base Overall
- Linkage between Manor Royal Based Employers and Education/Skills Providers
- Manor Royal Brand and Marketing Strategy
- Business Crime Prevention
- Estate Travel Plan
- Landscape & Ecology
- Managed Workspace - development of flexible space

#### Stage 1: A Representative Voice for Manor Royal

Whilst some businesses on Manor Royal are already members of recognised business representation bodies such as CADIA, the Chambers of Commerce or Sussex Enterprise, there is no significant, coordinated business forum or voice for the estate. The recent demise of the Manor Royal Business Park Association (now absorbed by CADIA) has not helped this situation. This presents a major challenge in that in order to coordinate joint actions to improve the competitive position of Manor Royal as a business location, it is a prerequisite to have a strong business led partnership.

We propose that a representative Manor Royal business grouping is established for the following reasons:

- There is currently no organisation that can act solely as the representative voice of businesses on the Manor Royal Estate and therefore the views and aspirations of this business community are difficult to identify or galvanise into action;
- There is no mechanism whereby the Manor Royal business community can enter into dialogue, collectively, with the Borough Council and other local, sub-regional and regional stakeholders. As such, the business community is limited in terms of its ability to influence the development of a number of key economic development and spatial planning agendas;
- The lack of a single coordinating body means that it is difficult to take action in terms of required estate or business improvements whether these are physical or economic in nature;
- A significant number of the priority actions identified for the improvement of Manor Royal (especially those defined as high priorities) require the configuration of a public/private task group to initiate proceedings and undertake further investigation where necessary. Development of a single representative grouping could therefore lead on a number of these priority actions
- Given the role that Manor Royal plays as a key business hub within the South East region as a whole, it is important that the businesses are able to influence partners' actions in ensuring that the area functions as effectively as possible as a key economic driver;
- The grouping could be used as a means of building capacity and creating a viable, new business networking structure for Crawley;
- A key longer term activity for local partners, in terms especially of raising revenues for developmental improvement, is likely to involve the development of a

Manor Royal Business Improvement District (BID). If this process is to be successful it must not be launched 'cold' upon a business community lacking collective, organisational capacity. Instead, it must be based upon a strong well established platform of public and private partnership, a strong representative voice for business that can articulate collective needs and an established process that already achieves tangible results in relation to specific key issues and constraints.

The initial starting point for any development and improvement to Manor Royal as a business location must involve the configuration of a specific business-led representative grouping that can effectively articulate the needs of the area's businesses and can proactively support the implementation of required actions. In order to establish and take forward this grouping, it will be necessary to identify a clear role and remit for the group and indeed a well-defined 'reward' to businesses in exchange for their active participation.

This 'reward' should be configured and expressed as a bottom line business benefit that accrues from improvement to both the physical and competitive environment of Manor Royal as a key business location, initiated by businesses themselves.

In order to galvanise action, initially the grouping can be configured around a set of key issues and specific outcomes and these might include some of the actions identified above as high priorities e.g. development of an estate travel plan and parking related issues or business crime strategy. The intention is that the group will both build capacity and develop confidence through achieving a set of issue based results.

Key stages in establishing this group are outlined in the following table.

In many respects the development of a new issue-based grouping to represent businesses on the Manor Royal estate represents the first stage in developing a Business Improvement District for the estate. A BID would have the benefit of raising revenues to implement important developments and improvements. The business group would provide an opportunity to achieve some initial outcomes thereby building both the capacity and the credibility upon which a successful BID programme could be generated.

One possible outcome, however, is that a new business grouping may begin to achieve quite significant results and may develop a status or configuration which forms a strong alternative to a formal BID mechanism. This would depend in large part on the extent to which a business group could raise revenues directly.

No. of formal development issues based on Group Stage	
1	<p><b>Mobilisation</b></p> <ul style="list-style-type: none"> <li>• Identify a relevant officer from within Crawley Borough Council to lead on the establishment of the group.</li> <li>• Undertake a set of meetings with relevant stakeholders in order to arrange in detail the terms of reference of the group, its overall remit and relationship with other strategic bodies. Discussion should be undertaken with both public partners and sector of larger and more influential businesses on the Manor Royal estate.</li> <li>• Ongoing dialogue with CADIA should be maintained throughout.</li> </ul>
2	<p><b>Membership</b></p> <ul style="list-style-type: none"> <li>• A list of potential members should be drawn up and those organisations should be invited to join the group. Active lobbying in order to encourage membership from influential organisations should be undertaken.</li> <li>• Private sector members could include those Manor Royal based companies that have actively participated in this study e.g. Grant Thornton, Sverre Hoarng Instruments Ltd, APV Vent Arks, Warton, Glavo Smith King, CGG Velux, Unilever, Earth Operations, as well as other locally associated organisations such as Vill Williams property advisers.</li> <li>• Public sector partners should include Crawley Borough Council, CADIA, Haveres, Internews, West Sussex HSJ, H&amp;A, West Sussex County Council.</li> <li>• Gatwick Airport/BAA should also be actively encouraged to join the group.</li> </ul>
3	<p><b>Governance &amp; Organisation</b></p> <ul style="list-style-type: none"> <li>• The Group should report directly to the LEAG.</li> <li>• Sectoral and organisational functions should be shared between Crawley Borough Council and CADIA.</li> </ul>
4	<p><b>Issue &amp; Functions</b></p> <ul style="list-style-type: none"> <li>• Initially the Group should come together under a specific issue-based agenda, developed upon the high priority issues emerging from this study. These initial issues should include: <ul style="list-style-type: none"> <li>• Development of a new issue plan</li> <li>• Development of a Crime and Business Safety Strategy</li> <li>• Identification of Environmental and Landscaping Interventions</li> <li>• Development of improved linkage with learning and training organisations</li> <li>• Development of a new Manor Royal Brand Identity and accompanying Marketing Strategy</li> </ul> </li> <li>• The group should also seek to generally influence the business community overall on the Manor Royal Estate and to act as a mechanism for dialogue between the business community in the area and public partners.</li> <li>• It would also be desirable for the group to initiate actions around business networking events and monitoring between larger organisations and smaller companies in the area, especially recent start-up businesses.</li> </ul>
5	<p><b>Funding and Status</b></p> <ul style="list-style-type: none"> <li>• Initially, the Group should seek small amounts of funding from Crawley Borough Council and SEEDA.</li> <li>• In the longer term it may be necessary for the group to also revenue independently and as such the group's legal status will have to be configured in order to allow this.</li> </ul>

#### Stage 2: Development of formal BID mechanism

The underlying principle of a BID is that it is driven by the local business community; as such it is critical that business interest is evident from the early stages of development, hence the need for a well established representative business grouping.

The business consultation undertaken as part of this study identified a significant level of interest, in particular from the larger businesses, in being involved in some form of public/private BID partnership to address the issues highlighted above. The key challenge is therefore to identify how best to establish a business partnership at Manor Royal, most likely through the identification of a set of prioritised actions that form the focus for collective working. There is therefore a role for the LEAG, through some of its core member organisations (including Crawley Borough Council, CADIA and Sussex Enterprise) to instigate the formation of a more comprehensive business forum for Manor Royal with a view to developing a Manor Royal BID.

#### BID Process

A BID is primarily a funding mechanism to help improve and manage a clearly defined business area, such as Manor Royal, and is based on the principle of an additional levy on all defined ratepayers following a majority vote. There is considerable flexibility in the BID process and the amount levied from businesses can vary (it is usually about 1% of

rateable value but up to 5% is permissible). Alternatively it can be a numeric sum and there can be varying tiers of payment depending on business size. Small businesses can be exempted from paying in certain circumstances. Typically, a BID involves 300 - 600 businesses.

The key challenge of the BID development process is to secure a successful vote, which must achieve both a majority in terms of number of ratepayers and the proportion of their rateable value, the levy becomes mandatory on all defined ratepayers and is treated in the same way as the Business Rate becoming a statutory debt (although there can be business exemptions).

It can typically take up to two years to prepare for a BID ballot. This requires the development of a comprehensive BID business plan that includes a clear set of prescribed services that the BID will deliver over a specified period of time (usually 5 years). This BID proposal must be taken through a full consultation process with both the business community and the public service providers, and in addition must include a set of baseline agreements that ensure the BID services remain 'additive' to those already provided through the public purse. This additionality is seen as crucial to secure support from businesses and justify them paying this extra levy.

The configuration of the representative Manor Royal business grouping outlined earlier could play a very important role in terms of preparing the ground for a successful and in coordinating development of the business plan.

In the UK, around 50 BIDs are in existence, mostly in town centre retail areas. Less than 10 UK BIDs relate to business or industrial parks although there is a successful local example at Southern Cross Estate in West Sussex. The Lancing Business Estate near Worthing is in the process of going to a ballot.

There is considerable guidance available on the development and delivery of a BID. In general there are a number of factors critical to the development of a successful BID. These include:

- Best practice research has identified that BIDs are more likely to be successful in reasonably prosperous businesses areas and in this respect Manor Royal is starting from a good baseline position - it is attempting to make a good business location better, rather than being an area of significant deprivation in a crisis situation.
- An initial BID viability assessment should be undertaken before embarking upon the detailed BID to identify the amounts that may be levied from the rateable values of the local businesses and the matched funding that may be available from the public sector. This would give an indication of the likely scale of resources available to tackle the identified issues. It is helpful to demonstrate that funding from both sectors can be obtained. A ratio of 1:1 is desirable.

- Recognising that the essence of a BID is the creation of a sustainable and equitable income stream via a mandatory levy on business occupiers, means that there must be a certain viability about those businesses that will be able to sustain a further occupancy cost. Where businesses are already operating on very marginal profits (which may be the case with many of the smaller businesses operating at Manor Royal), the BID levy is bound to be extremely price sensitive and may not raise enough income to make it a worthwhile venture.
- The BID development process typically takes 18 – 24 months and requires a full time BID manager (salary around £30,000 – £35,000). The BID development costs would most likely be of the order of £100,000 per annum.
- Possible sources of funding to assist with the development of a Manor Royal BID include:
  1. SEEDA had provided funding during 2007/08 to assist with some early actions for the development and implementation of the Gatwick Diamond business plan. Manor Royal has been identified as a priority area for easing congestion within the business plan with funding secured to support the development of the 'East-It' initiative.
  2. West Sussex Economic Partnership currently hosts the Southern Cross BID Manager post and this individual is also advising on the Lancing Business Park BID. It may be possible to use some of this resource to assist with a Manor Royal BID.
  3. All the bodies consulted (SEEDA, Crawley Borough Council, SEERA, WSEP, WSCC, Gatwick Diamond Partnership, CADIA, Gatwick and Crawley Chambers of Commerce and the Learning and Skills Council) regard Manor Royal Estate as a priority for action and it may be possible to access some resources from these organisations.
- The challenge for the BIDs is to demonstrate that the statutory level of services, as funded through the Business Rates, will continue and the BID will deliver an enhanced level of service additional to this basic standard

Whilst a BID needs to be centred around a business-led partnership, local authorities will also play an important enabling role in the BID development and delivery. Through the formal BID Regulations, the local authority is charged with a series of legal responsibilities including:

- The provision of the ratings data to calculate the BID levy;
- The collection and enforcement of the BID levy via a ring-fenced BID Revenue Account, which is then passed straight to the BID company;
- The organisation of the formal BID ballot;
- The preparation and commitment to the baseline service agreements.

A key BID challenge is identifying the most effective way of communicating and involving local businesses in the BID and securing a 'yes' vote. Whilst this may appear a difficult prospect, there is a considerable amount of experience and

best practice to draw upon and it is interesting to note that, for example, in London fifteen out of fifteen BID ballots have been successful. Again, a well established representative business grouping in Manor Royal that already has experience of securing local improvements could form a useful starting point.

Whilst a BID may be a useful formal mechanism for improving Manor Royal both physically and economically, it will also be important to take a longer-term approach and develop a strategic, spatial masterplan for Manor Royal involving a diverse range of land and property owners and public bodies. In this respect, it is important to consider how best established partnerships can be utilised (Gatwick Diamond, six local authorities) and whether they can they develop a strong delivery and operational remit.

### Stage 3: Planning change and delivery of physical change

A critical stages for immediate action in the regeneration of Manor Royal revolves around the delivery of step changes to the environment. Whilst some areas of this change may be delivered through the BID scheme, as outlined previously, the Council can also directly action as champions, change to the area.

One such areas that the Borough Council can action is work on creating an updated and adopted SPD for Manor Royal. This document should encompassing a robust Design Guide, based on the principles outlined in this document. As a Council led initiative that is not reliant on the private sector to drive it, this offers an immediate and lasting change to the way development is planned, designed and delivered in Manor Royal. It also offers developers a robust guide to what the Council is seeking in the area, and adds to the development certainty, consistency in development control decisions, and improved quality of built developments.

It is important not to underestimate the importance that smaller initiatives can deliver to the image of Manor Royal, and the perception of change that these actions have. Smaller initiatives can often act as a key catalyst for wider regeneration and change to areas, especially if they deliver highly visible results. Their importance in this regard should not be underestimated. The Council can action, as ambassadors of change, improvements to the public realm which is in their control. This includes the landscaped areas in public areas, along roads, at the key gateways and in the ecological corridor. Other partners may be brought on board to champion this 'greening' of Manor Royal.

Whilst the SPD process can be used to deliver a Design Guide for Manor Royal to assist in the Development Control process, other planning policy tools can be used to action change. Emerging documents in the LDF should take account of the role Manor Royal has, and help to realise its growth and regeneration potential. Critically, many of the principles in the Design Guide, and others mentioned throughout this document should be looked at for potential inclusion in the emerging Development Control DPD. This

would bring essential elements and concepts identified within this document into planning policy.

As mentioned previously, there may be a role for a more robust masterplan and/or Planning Brief or Framework to be developed for the area, to identify key sites for development and regeneration. The LDF process allows for these documents to be adopted as either Area Action Plans, or Supplementary Planning Documents, depending on the intended weight and significance of the document in the LDF process, and the area they cover.

In relation to the potential of Manor Royal to develop a sustainable energy centre or similar proposal such as CHP, it is anticipated that CBC will need to take a proactive lead in the progression and delivery of this. Given the nature of Manor Royal, characterised by fragmented ownership, and the relative obstacles/barriers to an ESCo or other body opportunistically engaging in Manor Royal, CBC will need to develop a strategy to facilitate delivery.

The first step will require further feasibility testing to understand to a greater degree the demand and supply issues, cost effectiveness, and potential locations and characteristics of any CHP (or similar) which could be supported at Manor Royal.

Once the principle of Manor Royals suitability for such a development is established, and broad parameters and options developed, it will be necessary to develop options for delivery. This will best be done with development partners, to ensure commercial viability. It will also be necessary to determine broadly who will champion this, as it is envisaged that CBC would not be the main player in the 'on-ground' application of such a development. This work will need to look at the means to facilitate delivery and the role CBC has, be it passing the development entirely to the private sector, using a quango or similar quasi-government body, or as public-private partners.



