Braintree District Futures 2025

Final Report for Braintree District Council

6 October 2006

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1 INTRODUCTION

Recent years have seen strong population growth in Braintree district, far in excess of the increase in local employment opportunities. Cambridge Econometrics (CE) and SQW were commissioned by Braintree District Council (BDC) to provide an analysis that will help it to develop policies which will achieve a better balance between employment and population growth in the future.

This report presents an overview of the current position of Braintree (Chapter 2) and three visions for the district to 2025, including quantified projections for the economy (Chapters 3-5). Chapter 6 brings together the policy implications arising from the analysis, and Chapter 7 sets out some questions and challenges for the District Council as it moves forward.

2 THE BASELINE POSITION OF BRAINTREE DISTRICT

2.1 Introduction

In this Chapter we assess the baseline position of Braintree district. To this end, we look at existing studies of the district and look at its performance vis-a-vis the comparator districts of: Bedford, Tonbridge and Malling, Maidstone and Ashford. These districts were identified as statistically most similar to Braintree district through the ONS's cluster analysis on data from Census 2001, and in policy terms their situation is broadly similar insofar as they are in or close to designated Growth Areas. Where appropriate, the data for Braintree are compared to that for Essex county, the East of England and the United Kingdom (UK). In some cases data are not available for the UK and data for Great Britain (GB) or England & Wales are used instead. The report draws on evidence from existing studies, and where such evidence is used, the data are reported upon rather than reproduced.

2.2 Characterising the Current Position of Braintree

Demographics

The population of Braintree grew by 1% pa in the period 1991-2004. This was twice the rate of growth of both Essex and the East of England. Ashford and Bedford's populations grew at similarly fast rates, while Maidstone and Tonbridge & Malling grew at rates closer to Essex and the East of England.

The broad age profile of populations (identifying children, those of working age and pensioners) is similar in all areas although Braintree has a slightly lower proportion of OAPs than the East of England and the UK. Conversely, the proportion of children in the population is slightly higher than is the case regionally or nationally. The proportion of the population that is of working age is similar to that of the UK, the East of England and the comparator districts. As with other Mid-Essex districts there was a large exodus of 16-24 year olds from Braintree in the period 1988-1999, but overall the district's working-age population increased strongly over the period.

TABLE 2.1: COMPARISON OF GROWTH, 1991-2004 (% PA)

	Braintree	East of England	UK
GVA	3.6	2.8	2.8
Employment	1.7	0.9	0.6
Population	1.0	0.5	0.3
Working Age Population	1.1	0.5	0.4

Source(s) : ONS, CE.

TABLE 2.2: SHARES OF EMPLOYMENT BY SECTOR, 2004

	Braintree	Tonbridge and Malling	Bedford	Maidstone	Ashford	East of England	UK
Agriculture etc	1.7	2.7	1.1	2.4	1.9	1.5	1.4
Mining & Quarrying	0.0	0.5	0.0	0.0	0.2	0.1	0.2
Manufacturing	17.0	13.2	9.8	6.4	11.7	11.7	11.6
Electricity, Gas & Water	0.0	0.5	0.4	1.0	0.0	0.3	0.4
Construction	11.6	7.7	6.8	11.1	11.4	8.4	6.5
Disrib.,Hotels & Cater	21.8	21.8	25.5	22.1	26.3	24.1	23.0
Transport & Comms.	4.9	9.2	5.7	5.6	5.5	6.1	6.0
Fin. & Business Services	15.5	19.8	18.7	20.3	14.8	19.4	19.6
Government & Other Serv.	27.7	24.7	32.3	30.9	28.0	28.3	31.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Note(s) : Shares are calculated as a percentage of total employment.
Source(s) : CE, ONS.

Economic structure

Braintree has a high proportion of employment in manufacturing

Considering the data for employment by sector in 2004 it is apparent that a larger percentage of employment is in manufacturing in Braintree than in any of the comparator districts. Manufacturing accounts for 17% of all employment in the district of Braintree compared to a proportion of 11¾% in the UK and 6½% in Maidstone (the comparator district with the lowest percentage of employees employed in manufacturing). Conversely, Maidstone is the district that has the highest percentage of employees in financial & business services, with a share of 20¼%. With the exception of Ashford (14¾%), Braintree (15½%) has the lowest percentage of employees working in the relatively high value-added-per-worker sector of financial & business services. Across the UK the share is 19½% of total employment. Apart from manufacturing, no sectors stand out as accounting for a larger than average proportion of employment in the district.

There was sustained employment growth in Braintree in the period 1991-2004, with growth averaging 1¾% pa. This rate of growth was much stronger than in the UK (½% pa) and the East of England (1% pa). With regard to the comparator districts, Bedford saw little growth in employment over the period, and employment in Ashford grew by only ¼% pa. Employment grew by 1¼% pa in Tonbridge & Malling as it did in Essex as a whole.

While employment growth was relatively high and sustained in Braintree over 1991-2004, there was considerable variation across the sectors. While manufacturing accounts for a significant proportion of employment in Braintree, employment in the sector decreased at a rate of ¼% pa over 1991-2004. However, the decrease in manufacturing employment in the East of England and the UK during this period was of a higher magnitude (2% pa in both cases), as it was in Essex (1%) and the comparator districts (a range of ½-3½% pa). In terms of employment, Braintree is relatively strong

TABLE 2.3: ACTIVITY AND INACTIVITY RATES, 2004 (%)

	Activity Rate	Inactivity Rate
GB	78.7	21.3
East of England	82.0	18.0
Essex	81.3	18.7
Braintree	81.9	18.1
Bedford	84.0	16.0
Ashford	84.9	15.1
Maidstone	83.1	16.9
Tonbridge & Malling	82.2	17.8

Note(s) : As a percentage of working-age population.
Source(s) : LFS.

in high-tech manufacturing and is a relatively attractive location for knowledge-intensive manufacturing. The specialised nature of manufacturing in Braintree may make it more resilient to the ongoing steady decline in the manufacturing sector in the UK as a whole.

Braintree has a high proportion of small businesses, with a local focus

Braintree has a relatively high proportion of small firms and only 15% of employment in the district is accounted for by large firms (200+ employees) compared with the GB average of 30%[1]. In line with the district's high levels of employment in manufacturing, however, there are a considerable number of mechanical engineering and metal goods employers with more than 50 employees. Most of the businesses in Braintree focus on local and regional markets and they account for 70% of the market for firms there[2].

The sector which employs the most people in Braintree is government & other services. Employment in the sector grew by 3¼% pa over 1991-2004. Despite being the largest sector in Braintree in terms of employment, government & other services accounts for a relatively low share of total employment (27½%). Tonbridge (24¾%) is the only comparator district where it accounts for a smaller share, and Essex (28%), the East of England (28%) and the UK (30½%) all have larger shares.

With the population of Braintree also growing over the period 1991-2004, some commensurate increase in employment might be expected. However, it is worth noting that the 1% pa increase in working age population was more than matched by 1¾% pa growth in employment over the same period, meaning the employment rate (measured by jobs) also increased over this period.

Local labour force

With regard to economic activity and inactivity (Table 2.3), Braintree outperforms Great Britain in terms of percentage of total working age population in employment, has a similar rate to the East of England, and has a slightly higher activity rate than Essex as a whole. However, in comparison to the comparator districts, Braintree has a relatively

1 Mid-Essex Futures, University of the West of England, March 2006.
2 ibid.

TABLE 2.4: SHARES OF EMPLOYMENT BY OCCUPATION, 2004 (%)

	Braintree	Bedford	Ashford	Maidstone	Tonbridge & Malling	East of England	England & Wales
1. Managers & Senior Officials	17.0	16.0	16.3	17.4	18.2	16.3	15.1
2. Professional	8.6	12.9	9.6	10.9	10.5	10.8	11.2
3. Associate Professional & Technical	13.1	13.5	12.8	14.2	13.6	13.5	13.8
4. Administrative & Secretarial	13.4	13.2	12.5	14.8	14.9	13.7	13.3
5. Skilled Trades	13.9	10.9	13.0	11.4	11.0	12.1	11.6
6. Personal Service	7.4	6.5	6.9	6.3	6.5	6.7	6.9
7. Sales & Customer Service	6.7	7.9	8.2	7.0	6.8	7.3	7.7
8. Process, Plant & Machine Operatives	8.7	7.9	8.0	6.7	6.8	8.1	8.5
9. Elementary	11.3	11.2	12.5	11.3	11.7	11.5	11.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Note(s) : Shares are calculated as a percentage of total employment.
Source(s) : LFS, CE.

low activity rate. It is outperformed by all of the comparator districts, particularly Bedford and Ashford.

Braintree has a relatively low proportion of jobs in professional occupations

Braintree has a higher percentage of workers (residence-based) employed as managers and senior officials than both England & Wales and the East of England (Table 2.4). The district does, however, have a smaller percentage of people working in professional occupations than any of the comparator districts, the East of England and England & Wales. The difference between Braintree and the comparator districts is marked, and the largest difference is with Bedford where employment in professional occupations is 5 pp higher than in Braintree. Conversely, Braintree has a higher percentage of people than any of the comparator districts, the East and England & Wales in Personal Service Occupations and Process, Plant and Machine operatives.

Average earnings of Braintree residents are high

Analysis of average earnings data shows that residents of Braintree earn more on average than those in the UK as a whole, the East of England and Essex (Table 2.5). The district also has higher average resident earnings than all of the comparator districts with the exception of Tonbridge and Malling. However, the findings are quite different when workplace earnings are examined. On this measure, Braintree has lower earnings than the UK, East of England and Essex. This phenomenon is also apparent in the comparator districts. While all the districts have higher average resident earnings than the UK, none of them is in this position for average workplace earnings. This is indicative of districts where higher earning residents tend to commute outside of the district (many to London) to work.

A large proportion of Braintree residents have no, or low, qualifications

According to data from Census 2001, a significant proportion (28%) of residents in the district do not have any qualifications. Although this is similar to the average for the East of England, it is higher than in any of the comparator districts. The district has a higher proportion of residents with NVQ level 1 or 2 qualifications than in most comparator districts, and than in Essex, the East of England or England & Wales. The

TABLE 2.5: COMPARISON OF EARNINGS BY WORKPLACE AND RESIDENCY, 2005 (£)

	Resident Analysis	Workplace Analysis
United Kingdom	517.0	517.0
East	549.7	512.1
Essex	579.2	522.7
Bedford	531.9	494.9
Braintree	582.0	489.4
Ashford	528.0	480.7
Maidstone	540.1	441.8
Tonbridge and Malling	603.0	479.0

Source(s) : Annual survey of hours and earnings.

total proportion of Braintree residents with no qualifications, or with NVQ level 1 or 2 qualifications (70%), is much higher than in any of the comparator districts or the East of England (67%) or England & Wales (65%). Looking at higher level qualifications, the converse is true, and a much lower proportion (14.6%) of residents in Braintree have NVQ level 4/5 qualifications than in all other comparator areas.

Commuting

Commuting patterns give a view on the spatial dynamic of labour supply in an area. The study of the daily movements of workers allows a view on the degree of mismatch between the working population living in an area and the workers who work in the same area.

Braintree experiences net outcommuting, and the scale of the outflow from the district is 2¼ times the inflow. According to Census 2001, around 43% of employed Braintree residents (28,500) commuted out of the district, while around 13,000 commuted into the district. The result is a net outflow of 15,500 workers. The main outcommuting destinations are: London (which accounts for one-quarter of all commutes), Chelmsford, Uttlesford and Colchester. The propensity to commute differs depending on level of qualification. Workers on higher pay have the capacity and propensity to commute farther and that higher pay tends to be correlated with higher levels of qualifications. Data from the population censuses show that between 1991-2001, over 20% of white collar workers (defined as managers, professional occupations, associate professional occupations and clerical staff) in Braintree commuted outside the region to work, whereas for other workers the figure was only 5%[3].

The Census 2001 data show that 75% of Braintree's workplace population commute within Braintree district (the highest of all the districts in mid-Essex), while 5% of the workplace population commute to Braintree from other districts in the East of England and just 2% of the workplace population commute to Braintree from outside the region.

3 Mid-Essex Futures, University of the West of England, March 2006, p60.

Around 10% of residents in employment work from home, which is a higher percentage than in both London (8½%) and the East of England (9½%).

2.3 Perceived Strengths and Weaknesses

Main strengths

Braintree district is attractive for a number of reasons and some of its main strengths are listed below.[4]

- Proximity to London
- Proximity to Stansted
- A strong small firm sector
- A diverse and broadly based economy, with strong representation of growing sectors
- Competitiveness with the rest of the London arc

There are, however, also some weaknesses which include

- A perceived shortage of development land and distribution space
- Increasing congestion
- A large proportion of residents with the highest skills commute out of the region to work
- There is a tendency for young people to leave the area, especially graduates

2.4 Future Underlying Trends for Braintree

Demographics

According to the ONS's projections, population in Braintree is expected to grow by just over 1% pa over 2006-25. The population of children is expected to grow by around ½% pa over the same period, which is slower than the growth of ¾% pa projected for Ashford, but is faster than the growth projected in all the other comparator districts. In both the UK and Essex the population of children is expected to decrease only slightly over the same period. The working-age population is projected to grow by ¾% pa over 2006-25 which is ¼ pp below the rate for Ashford but faster than or equal to the growth rates projected in the comparator districts. It is faster than the ¼% pa growth rate projected for Essex, and the ½% projected for the East of England and the UK. High population growth is expected in pensioners and, of all the districts and regions that were analysed, Braintree has the highest projected growth rate (3% pa) over 2006-25. In the comparator districts, faster growth is also projected than in the rest of the UK, and Ashford has a similarly fast projected rate of 2½% pa.

4 Mid-Essex Futures, University of the West of England, March 2006, p15.

Economic growth

On the basis of recent forecasts for the UK and East of England[5], and recent underlying trends, employment in Braintree could be expected to rise by ¾% pa over 2006-25. This is similar to the East of England average and is higher than the UK average of ½-¾% pa over the same period. Areas which would be expected to see particularly strong employment growth are: construction, retailing, hotels & catering, banking & finance, professional services and business services. The transition of Braintree into a service-sector economy would continue (as it is expected to in the East of England and the UK), with manufacturing employment expected to fall.

5 Regional Economic Prospects, Cambridge Econometrics, February 2006.

3 VISION ONE: BUSINESS AS USUAL

Chapters 3-5 set out three alternative 'Visions' for Braintree district, with quantified results prepared using CE's Local Economy Forecasting Model (LEFM) tailored to the Braintree economy. The purpose of the economic modelling is to illustrate the higher-order implications for the district of the alternative visions.

3.1 The Vision

Overview By 2025, Braintree District will continue to be an attractive place to live, but few of its higher-skilled residents will work there. Rather, the rate of out-commuting will have risen since 2006 and employment growth in the District will have been insufficient to match the population growth associated with the Growth Area and nearby growth point, leading to Braintree becoming more of a 'dormitory District'.

Economic structure Following on from trends at the end of the 20th Century, the manufacturing sector in the District will have largely disappeared, to be replaced by a growth in jobs in the distribution sector. There will have been an increase in the numbers of large warehouses built to service the expanded Stansted Airport and Haven Gateway ports and the number of people employed in distribution will have grown. This focus on distribution will, however, have caused some deterioration in the visual environment (particularly along the A120 Corridor) and increased congestion in the District, particularly on radial routes and the approaches to the fast train service from Witham to London Liverpool Street. These developments will have negatively impacted on the quality of life for District residents who will face longer journeys for work and leisure as well as increased levels of air pollution.

Skills The lack of any significant investment in improving skills levels will mean that the District experiences continuing problems in attracting higher-wage companies to set up within its boundaries. While a significant proportion of the population will be affluent, there will be a clear divide between those who commute out of the District each day to work in higher-skilled and higher-paid jobs in Chelmsford, Colchester and London and people working locally who find it very difficult to access the housing market given their relatively low wages.

Retail and leisure This polarisation will also impact on the viability of town centres, with residents preferring to shop and spend their leisure time outside the District boundaries: the town centre environments in Braintree, Halstead and Witham will all show signs of malaise. However an exception may be in the niche retail sector, where the expansion of outlet centres is a strong pull to out-of-town shopping centres.

Social issues The relative lack of career (rather than job) opportunities for young people coupled with high housing costs will mean that Braintree District continues to struggle to retain and attract recent graduates and school leavers. This will impact on entrepreneurship and on the competitiveness of local businesses, and the District will fail to exploit its proximity to centres of knowledge generation fully as skilled manufacturing disappears. The aging population will also add to the mismatch between numbers of residents and jobs within the District, as well as increasing pressure on local services including the NHS, although participation in voluntary activities will be high.

By 2025, Braintree will have become a dormitory District for the more affluent and dynamic areas around it, with low quality service jobs and some basic services provided for local people. It will rely largely on spin-off benefits from the expansion in employment provision and economic growth in the areas around the District.

3.2 The Quantified Vision for the Economy

Economic growth

The results of the 'Business as Usual' scenario are presented in Tables 3.1-3.5. Table 3.1 shows that under this scenario output (GVA) growth in the district is expected to grow at a similar rate to the East of England as a whole (2¾% pa) over 2005-15, and slightly slower than the East of England (just over 2½% pa compared with 2¾% pa in the East of England) over 2015-25. GVA growth in Braintree (as the East of England) is expected to be faster than the UK average over the whole of the forecast period.

TABLE 3.1: HEADLINE GROWTH INDICATORS - VISION 1

	2000 -2005	2005 -2015	2015 -2025
GVA			(% pa)
Braintree	3.9	2.7	2.6
East of England	2.2	2.7	2.8
UK	2.3	2.5	2.5
Household Income			
Braintree	4.0	3.2	3.0
East of England	3.0	2.9	2.8
UK	2.5	2.7	2.6
Employment			
Braintree	2.4	0.9	0.8
East of England	0.9	0.8	0.7
UK	0.8	0.6	0.5
Population			
Braintree	1.1	1.2	1.0
East of England	0.6	0.6	0.5
UK	0.4	0.4	0.4

Source(s) : Cambridge Econometrics, August 2006.

TABLE 3.2: GVA IN BRAINTREE - VISION 1

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
			(£ 2002 millions)				(% pa)
Agriculture etc	26.8	30.0	28.1	26.2	2.3	-0.6	-0.7
Mining & Quarrying	2.0	1.7	1.9	2.0	-3.0	1.0	0.6
Manufacturing	402.3	405.9	467.2	528.2	0.2	1.4	1.2
Electricity, Gas & Water	4.9	4.8	5.9	7.4	-0.5	2.1	2.3
Construction	176.1	208.6	268.8	350.8	3.4	2.6	2.7
Disrib.,Hotels & Cater	238.8	312.5	406.6	522.0	5.5	2.7	2.5
Transport & Comms.	98.4	129.9	187.6	282.1	5.7	3.7	4.2
Fin. & Business Services	282.9	385.0	525.7	718.3	6.4	3.2	3.2
Government & Other Serv.	318.7	408.5	551.8	713.3	5.1	3.1	2.6
Total	1628.6	1968.9	2558.6	3297.1	3.9	2.7	2.6

Source(s) : Cambridge Econometrics, August 2006.

Output growth in the district is expected to be driven by services, with output of agriculture falling and manufacturing output only growing slowly (see Table 3.2). The strongest growth is expected to be in transport & communications, although growth is expected to be more in line with the UK average than the, faster, average for the East of England as a whole. Similarly, although output of financial & business services is expected to be fairly rapid over the forecast period, growth in Braintree is expected to be similar to the UK average, and focused in the lower-value added, supporting services. In contrast, in the East of England as a whole, strong growth is expected in the mainly high value added financial and professional services. The sector in which Braintree is expected to see stronger growth than in the East of England or UK as a whole, as it is estimated to have done in the past, is government & miscellaneous services.

Average household income in the district is expected to grow faster than in both the East of England and UK to 2025, boosted mainly by the incomes of the higher-skilled residents who work outside the district, especially those who work in London.

Employment growth

Under this vision, employment growth in the district is expected to continue to be faster than in the East of England and UK as a whole at just under 1% pa over 2005-15, and around ¾% pa over 2015-25. This equates to an increase of almost 11,000 jobs between 2005 and 2025. This is still expected to be slower than population growth in the district, and so the number of residents commuting out of the district to work will continue to grow.

Employment by sector

Employment growth by broad sector in the district is shown in Table 3.3. Employment in agriculture is expected to continue to decline sharply, as is employment in manufacturing. The decline in employment in manufacturing is expected to be faster than in the East of England over the forecast period, and so the share of manufacturing employment in the total in the district is expected to be closer (although still higher) than the average for the East of England than is currently the case.

TABLE 3.3: EMPLOYMENT BY SECTOR IN BRAINTREE - VISION 1

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Agriculture etc	1.1	1.1	0.7	0.4	-0.6	-4.4	-5.1
Mining & Quarrying	0.0	0.0	0.0	0.0	-7.4	-0.9	-1.0
Manufacturing	11.4	9.6	8.8	7.9	-3.3	-0.9	-1.1
Electricity, Gas & Water	0.1	0.1	0.0	0.0	-2.9	-0.6	-0.8
Construction	5.0	7.2	8.7	10.0	7.5	1.9	1.4
Disrib.,Hotels & Cater	11.1	12.8	14.1	15.2	2.9	1.0	0.7
Transport & Comms.	2.5	2.8	3.3	4.0	2.3	1.6	1.9
Fin. & Business Services	8.4	9.1	10.5	12.1	1.6	1.4	1.4
Government & Other Serv.	12.6	16.2	18.5	20.2	5.1	1.3	0.9
Total	52.3	59.0	64.7	69.8	2.4	0.9	0.8

Source(s) : Cambridge Econometrics, August 2006.

Employment in distribution, hotels & catering is expected to grow slightly faster than in the East of England and UK, but within this sector the growth is expected to be strongest in distribution, which is expected to grow much faster than in the East of England as a whole, driven by the strong growth in warehousing facilities under this scenario. Related to this, the sector expected to be among the fastest growing, in employment terms, especially in the longer term, is transport & communications.

Employment by type

The strongest growth in employment by type in Braintree (see Table 3.4) to 2025 is expected to be in male part-time employment. Much of this growth is expected to be in distribution and land transport.

Employment by occupation

As in the rest of the UK, there is expected to be a general shift towards higher-order occupations in Braintree over the forecast period. However, under this vision, the

TABLE 3.4: EMPLOYMENT BY TYPE IN BRAINTREE - VISION 1

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Male full-time	20.5	22.1	23.4	24.3	1.5	0.6	0.4
Female full-time	10.0	11.1	12.5	14.0	2.0	1.2	1.1
Male part-time	3.0	3.7	5.4	7.1	4.4	3.8	2.8
Female part-time	10.7	12.1	12.6	12.9	2.5	0.4	0.2
Male self-employed	5.9	7.4	7.9	8.2	4.4	0.7	0.4
Female self-employed	2.1	2.5	2.8	3.2	4.1	1.1	1.2
Total Employment	52.3	59.0	64.7	69.8	2.4	0.9	0.8

Source(s) : Cambridge Econometrics, August 2006.

proportion of managers & senior officials and professional occupations in Braintree is expected to remain below the average for the East of England and UK as a whole. The strongest growth is expected among the lower-skilled jobs in sales & customer service occupations (reflecting the growth in retail, hotels & catering and other sales-related activities), and the number of jobs in these occupations are expected to grow faster than in the rest of the region or UK.

TABLE 3.5: EMPLOYMENT BY OCCUPATION IN BRAINTREE - VISION 1

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Managers & Senior Officials	7.6	8.8	10.6	12.2	2.9	1.8	1.5
Professional	5.8	6.8	8.1	9.2	3.4	1.7	1.3
Associate Professional & Technical	6.7	8.1	9.5	10.7	3.7	1.6	1.2
Administrative & Secretarial	8.3	9.1	9.2	9.1	1.8	0.1	-0.2
Skilled Trades	7.0	7.6	7.9	8.1	1.9	0.4	0.1
Personal Service	3.2	4.2	5.1	5.9	5.7	2.0	1.5
Sales & Customer Service	3.2	3.6	4.6	5.7	2.6	2.5	2.2
Process, Plant & Machine Operatives	4.7	4.7	4.6	4.5	0.1	-0.2	-0.3
Elementary	5.9	6.0	5.2	4.5	0.4	-1.5	-1.5
Total	52.3	59.0	64.7	69.8	2.4	0.9	0.8

Source(s) : Cambridge Econometrics, August 2006.

4 VISION TWO: PROVIDING A FOCUS ON LEISURE, HERITAGE AND NATURE

4.1 The Vision

Overview

By 2025, Braintree District will be well-known for the quality of its leisure and recreation facilities, providing a draw for people from outside the area for shopping, entertainment and longer stays in an attractive rural environment, easily accessible by air, rail, sea and road.

Economic structure

Strong leadership and a clear vision on the part of Braintree District Council will have improved the retail and recreational offer of Braintree District, building on the distinctive character of Braintree, Witham and Halstead and the surrounding rural area. The economic growth of neighbouring areas and increased investment in the growth areas will have led to a rapid increase in the numbers of affluent consumers within a short travel distance, and the District will have positioned itself uniquely in response.

The success of the London 2012 Olympics and the effective marketing and promotion of Braintree as an attractive and accessible venue will have led to an increase in tourist numbers arriving through the Haven Gateway ports and Stansted Airport.

Retail and leisure

By 2025, the District will be well known for the quality of its cultural offerings, with a week-long music and theatre festival hosted in venues throughout the District each year in July. Many visitors will also take advantage of the range of leisure opportunities including canoeing and cycling provided in the rural areas of the District. Farm stays will also be popular and local businesses will have diversified, offering local foods at the weekly market as well as promoting farm stay holidays in the District. The educational nature conservation centre, with an outdoor adventure park, artificial lakeside beach and animal sanctuary, will provide a particular draw for families.

In addition, retail provision in the District will be significantly improved, with a range of specialist local shops opening in the town centres, a weekly food market showcasing local produce in Braintree and the expansion of specialist outlet centres attracting visitors from the surrounding Districts as well as from further afield. The town centres will have become more dynamic and offer a range of places to eat including family-run restaurants and evening events such as concerts and plays. Great Leighs racecourse will also have proved to be a draw, with conference guests often taken the opportunity to visit Braintree.

Although out-commuting remains high as many residents continue to work outside the District, it will be a more attractive place for residents and visitors to spend their leisure time and money. Braintree District Council will have been careful to minimise the development of warehousing in order to maintain the quality of the natural environment.

Social issues

The increase in service provision will mean that jobs are generated across the sector – although some of these remain relatively low-paid. However, there will be continuing out-migration of younger people with social polarisation evident as local wages fail to keep pace with those in nearby urban centres.

4.2 The Quantified Vision for the Economy

Economic growth

The results of this vision are presented in Tables 4.1-4.5. Table 4.1 shows that, under this vision, output (GVA) in Braintree is expected to grow at a similar rate to that under the ‘Business as Usual’ vision. The sectoral structure of this growth, however, is expected to be somewhat different. Firstly, although agriculture is still expected to account for a relatively small proportion of output (and employment) of the Braintree economy, output is expected to grow rather than decline, as the rural economy is boosted by the activities described above. The restriction on warehousing in the district will have reduced output growth in distribution and transport industries, although this will have been mostly mitigated by stronger growth in retailing and hotels & catering through increased leisure spending in the district. Output of other leisure services (within the government & other services category) will also have been boosted through increased leisure, including sporting, activities undertaken in the region.

TABLE 4.1: HEADLINE GROWTH INDICATORS - VISION 2

	2000 -2005	2005 -2015	2015 -2025
GVA			(% pa)
Braintree	3.9	2.7	2.6
East of England	2.2	2.7	2.8
UK	2.3	2.5	2.5
Household Income			
Braintree	4.0	3.2	3.1
East of England	3.0	2.9	2.8
UK	2.5	2.7	2.6
Employment			
Braintree	2.4	1.0	0.9
East of England	0.9	0.8	0.7
UK	0.8	0.6	0.5
Population			
Braintree	1.1	1.2	1.0
East of England	0.6	0.6	0.5
UK	0.4	0.4	0.4

Source(s) : Cambridge Econometrics, August 2006.

TABLE 4.2: GVA IN BRAINTREE - VISION 2

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(£ 2002 millions)			(% pa)
Agriculture etc	26.8	30.0	42.3	65.2	2.3	3.5	4.4
Mining & Quarrying	2.0	1.7	1.9	2.0	-3.0	1.0	0.6
Manufacturing	402.3	405.9	467.2	528.2	0.2	1.4	1.2
Electricity, Gas & Water	4.9	4.8	5.9	7.4	-0.5	2.1	2.3
Construction	176.1	208.6	268.6	351.0	3.4	2.6	2.7
Disrib.,Hotels & Cater	238.8	312.5	395.7	499.1	5.5	2.4	2.3
Transport & Comms.	98.4	129.9	184.1	273.5	5.7	3.5	4.0
Fin. & Business Services	282.9	385.0	524.5	719.0	6.4	3.1	3.2
Government & Other Serv.	318.7	408.5	556.9	733.1	5.1	3.1	2.8
Total	1628.6	1968.9	2562.2	3325.5	3.9	2.7	2.6

Source(s) : Cambridge Econometrics, August 2006.

Household incomes would be expected to grow very slightly faster than in the 'Business as Usual' vision in the long term, due to stronger growth in employment in some sectors.

Employment growth

Overall, employment growth under this vision is expected to be very slightly faster than in the 'Business as Usual' scenario. The increase in total employment is expected to be almost 12,000. Growth is still not expected to be as fast as that in population over the forecast period, but the gap is expected to be less, and so although outcommuting is expected to continue to increase, the rate of increase is expected to be less.

Employment by sector

Table 4.3 shows that although employment in agriculture in the district is expected to continue to decline, this is at a much slower rate than in the 'Business as Usual' vision. This would also be a much slower rate of decline than in the East of England or UK as a whole. The increase in leisure and tourism spending in the district would also help boost employment in retailing and hotels & catering, and so, despite slower growth in distribution as a result of restrictions on the development of warehousing, overall growth in employment in distribution, hotels & catering in the district would be faster under this vision in the longer term. Growth would also be faster than in the East of England and UK over 2015-25. Employment in 'miscellaneous services', which includes sporting and leisure activities would also be boosted over the whole of the forecast period.

Employment by type and occupation

Changes in the structure of employment by type in the district are expected to be fairly similar to that in the 'Business as Usual' scenario (see Table 4.4), as are those in employment by occupation (see Table 4.5).

TABLE 4.3: EMPLOYMENT BY SECTOR IN BRAINTREE - VISION 2

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Agriculture etc	1.1	1.1	1.1	1.0	-0.6	-0.4	-0.2
Mining & Quarrying	0.0	0.0	0.0	0.0	-7.4	-0.9	-1.0
Manufacturing	11.4	9.6	8.8	7.9	-3.3	-0.9	-1.1
Electricity, Gas & Water	0.1	0.1	0.0	0.0	-2.9	-0.6	-0.8
Construction	5.0	7.2	8.7	10.0	7.5	1.8	1.4
Disrib.,Hotels & Cater	11.1	12.8	14.0	15.2	2.9	0.9	0.9
Transport & Comms.	2.5	2.8	3.3	3.8	2.3	1.4	1.6
Fin. & Business Services	8.4	9.1	10.5	12.1	1.6	1.4	1.4
Government & Other Serv.	12.6	16.2	18.7	20.8	5.1	1.4	1.1
Total	52.3	59.0	65.0	70.9	2.4	1.0	0.9

Source(s) : Cambridge Econometrics, August 2006.

TABLE 4.4: EMPLOYMENT BY TYPE IN BRAINTREE - VISION 2

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Male full-time	20.5	22.1	23.5	24.9	1.5	0.6	0.6
Female full-time	10.0	11.1	12.5	14.2	2.0	1.3	1.2
Male part-time	3.0	3.7	5.4	7.2	4.4	3.8	2.9
Female part-time	10.7	12.1	12.6	12.9	2.5	0.4	0.2
Male self-employed	5.9	7.4	8.0	8.4	4.4	0.8	0.4
Female self-employed	2.1	2.5	2.9	3.3	4.1	1.3	1.4
Total Employment	52.3	59.0	65.0	70.9	2.4	1.0	0.9

Source(s) : Cambridge Econometrics, August 2006.

TABLE 4.5: EMPLOYMENT BY OCCUPATION IN BRAINTREE - VISION 2

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Managers & Senior Officials	7.6	8.8	10.7	12.6	2.9	1.9	1.7
Professional	5.8	6.8	8.1	9.3	3.4	1.7	1.4
Associate Professional & Technical	6.7	8.1	9.5	10.9	3.7	1.7	1.4
Administrative & Secretarial	8.3	9.1	9.2	9.1	1.8	0.1	-0.2
Skilled Trades	7.0	7.6	8.1	8.4	1.9	0.5	0.4
Personal Service	3.2	4.2	5.2	6.0	5.7	2.1	1.5
Sales & Customer Service	3.2	3.6	4.5	5.6	2.6	2.4	2.2
Process, Plant & Machine Operatives	4.7	4.7	4.6	4.5	0.1	-0.2	-0.3
Elementary	5.9	6.0	5.2	4.6	0.4	-1.4	-1.3
Total	52.3	59.0	65.0	70.9	2.4	1.0	0.9

Source(s) : Cambridge Econometrics, August 2006.

5 VISION THREE: WHERE IDEAS TAKE SHAPE

5.1 The Vision

Overview

By 2025, Braintree will enjoy a strong knowledge-driven economy with high-quality jobs and businesses located in the District and reduced levels of net out-commuting. Strong civic leadership, improved partnership working (with businesses and marketing focused on clearly-defined business sectors) will have helped to encourage both inward investment and the growth of businesses born locally, and the District will be seen as a key part of the region's knowledge and innovation economy. The District will enjoy the best of both worlds: excellent national and international communication links, as well as increased confidence and an improved ability to direct its own future.

Economic structure

By 2025, the District will have established itself as a specialised, high-quality manufacturing centre for regional innovations, building on its manufacturing heritage and knowledge as well as cementing its importance to the regional innovation economy.

This economic shift will have been achieved both by encouraging the growth of this specialised sector and limiting the increase in the share of less specialised sectors such as distribution: 'warehousing' will be limited through strict planning policies, and the District will have promoted business parks linked to regional strengths in ideas generation as well as encouraging inward investment. Planning policies also have had an important role to play in ensuring the provision of medium-sized workspaces for expanding businesses, and providing suitable offices for service sector businesses relocating from London. The planning policies will be sympathetic to – and cognisant of – the different opportunities and constraints in Halstead, Braintree and Witham, and in the rural areas.

The District will have capitalised on its international links with a twinning programme. Local businesses and entrepreneurs will enjoy better international links and the roll-out of broadband across the District will provide access to world-wide markets for products and services. Local business networks will have been strengthened through the business champion programme. Local highly-skilled residents who had previously commuted to jobs in urban centres will have been encouraged to set up their own businesses or work locally.

Skills

The increasing specialisation of businesses in the District means that there will have been increasing interest in developing appropriate skills from both employers and potential employees. An effective programme of skills provision and training will have relied on strong links between FE and HE institutions and local businesses, and local people in training will benefit from work placements and courses adapted to the needs of the workplace.

Retail and leisure

The District will also enjoy an improved retail offer for its residents. A concerted marketing campaign by BDC will have encouraged the opening of initial flagship stores. Although larger urban centres outside the District will remain a draw, town centres will offer an improved range of high street shops for the needs of local people. Strong investment in the rural economy will have led to a diverse range of small (and environmentally sympathetic) businesses thriving across the District.

Social issues

The development of high-quality employment opportunities locally will have led to a reduction in the rate of increase in out-commuting. The high quality of life in the District as well as the attractive rural environment will have meant that young people are more likely to return to or move to the District for work. The reduced reliance on commuting and transport-based sectors means that Braintree District will also reduce its carbon footprint.

5.2 The Quantified Vision for the Economy

Economic growth

The results of the LEFM scenario under this vision are presented in Tables 5.1-5.5. The headline results are shown in Table 5.1. The table shows that under this vision output growth is expected to be the strongest of all three visions. Growth of around 2¾% pa over 2005-15 and just under 3% pa over 2015-25 would be faster than in the East of England as a whole, and substantially faster than the UK average.

TABLE 5.1: HEADLINE GROWTH INDICATORS - VISION 3

	2000 -2005	2005 -2015	2015 -2025
GVA			(% pa)
Braintree	3.9	2.8	2.9
East of England	2.2	2.7	2.8
UK	2.3	2.5	2.5
Household Income			
Braintree	4.0	3.3	3.2
East of England	3.0	2.9	2.8
UK	2.5	2.7	2.6
Employment			
Braintree	2.4	1.1	1.1
East of England	0.9	0.8	0.7
UK	0.8	0.6	0.5
Population			
Braintree	1.1	1.2	1.0
East of England	0.6	0.6	0.5
UK	0.4	0.4	0.4

Source(s) : Cambridge Econometrics, August 2006.

The pattern of sectoral growth under this vision would be rather different to the 'Business as Usual' scenario. Firstly, manufacturing growth in the district would be quite a bit stronger than under that vision, and would also be stronger than in the East of England and UK as a whole. Within manufacturing, growth in high tech, high value added, industries such as electronics, electrical and instrument engineering would be especially robust.

Output growth in distribution, hotels & catering as a whole would be slower than in the 'Business as Usual' vision, although retailing and hotels and catering would see stronger growth. Output growth in transport & communications, and within that sector mainly land transport, would also be slower due to the tighter policy on warehousing developments than in the 'Business as Usual' vision.

The strongest growth in output would be in financial & business services, and this would be expected to be faster than in the East of England and UK as a whole, as the growth of specialist manufacturing and higher value added services firms require the support services to back them up, and the relocation of activity from London. Over 2005-25, the sector could see employment rise by over 4,000 (2% pa).

The programmes put in place to improve the skills base in the district will boost growth in the education sector, which will also be expected to grow faster than the East of England and UK averages.

A move towards higher-skilled jobs in the district will improve earnings, and so household income growth in the district under this vision would be expected to be stronger than under both of the other visions, and much stronger than the East of England and UK average growth.

Employment growth

As with output, employment growth under this vision is expected to be quite a bit faster than under the other two visions, and total employment is expected to increase by around 14,000 jobs between 2005 and 2025. Stronger growth in employment, nearer to the

TABLE 5.2: GVA IN BRAINTREE - VISION 3

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(£ 2002 millions)			(% pa)
Agriculture etc	26.8	30.0	28.1	43.3	2.3	-0.6	4.4
Mining & Quarrying	2.0	1.7	1.9	2.0	-3.0	1.0	0.6
Manufacturing	402.3	405.9	483.4	588.6	0.2	1.8	2.0
Electricity, Gas & Water	4.9	4.8	5.9	7.4	-0.5	2.1	2.3
Construction	176.1	208.6	268.6	351.0	3.4	2.6	2.7
Disrib.,Hotels & Cater	238.8	312.5	396.9	503.1	5.5	2.4	2.4
Transport & Comms.	98.4	129.9	184.1	273.5	5.7	3.5	4.0
Fin. & Business Services	282.9	385.0	549.1	809.9	6.4	3.6	4.0
Government & Other Serv.	318.7	408.5	559.8	746.1	5.1	3.2	2.9
Total	1628.6	1968.9	2591.2	3464.0	3.9	2.8	2.9

Source(s) : Cambridge Econometrics, August 2006.

expected growth in population, and better quality, better paid, jobs, would encourage fewer people to commute out of the district. Although the overall growth in population is expected to be the same as in the other visions, the age profile would be expected to be quite different, with a greater proportion in the younger working-age groups.

Employment by sector

Although manufacturing employment would be expected to continue to decline, the fall would be much slower than under the 'Business as Usual' vision, and much slower than the UK average decline. The shake out in jobs would also tend to be at the lower end of the value added scale, and employment in pharmaceuticals (albeit from a small base), mechanical engineering, electronics and electrical & instrument engineering would be expected to grow.

Improved prospects for the economy overall, and better quality jobs in the district, mean that employment in retailing will see stronger growth than under the 'Business as Usual' vision. A more affluent resident population will also help to boost growth in leisure services such as hotels & catering and miscellaneous services.

Employment growth in transport & communications, mainly through land transport, is expected to be slower than in the 'Business as Usual' scenario as a result of the stricter planning policy on warehouse developments.

Growth in financial & business services employment is expected to be much stronger under this vision, boosted by firms locating to the district because of its desirable location and, more importantly, highly qualified workforce. Businesses to provide support to the higher value added firms and better qualified and paid residents will also move into the district.

Government & other services is also expected to see stronger growth in employment, partly through stronger growth in education services, and also through stronger growth in miscellaneous services, which include sporting and leisure services, and other services that will see increased demand from a more affluent population.

TABLE 5.3: EMPLOYMENT BY SECTOR IN BRAINTREE - VISION 3

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Agriculture etc	1.1	1.1	0.7	0.7	-0.6	-4.4	-0.2
Mining & Quarrying	0.0	0.0	0.0	0.0	-7.4	-0.9	-1.0
Manufacturing	11.4	9.6	9.0	8.4	-3.3	-0.7	-0.7
Electricity, Gas & Water	0.1	0.1	0.0	0.0	-2.9	-0.6	-0.8
Construction	5.0	7.2	8.7	10.0	7.5	1.8	1.4
Disrib.,Hotels & Cater	11.1	12.8	14.0	15.4	2.9	1.0	0.9
Transport & Comms.	2.5	2.8	3.3	3.8	2.3	1.4	1.6
Fin. & Business Services	8.4	9.1	10.9	13.5	1.6	1.8	2.2
Government & Other Serv.	12.6	16.2	18.8	21.2	5.1	1.5	1.2
Total	52.3	59.0	65.5	73.1	2.4	1.1	1.1

Source(s) : Cambridge Econometrics, August 2006.

TABLE 5.4: EMPLOYMENT BY TYPE IN BRAINTREE - VISION 3

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Male full-time	20.5	22.1	23.8	25.9	1.5	0.7	0.9
Female full-time	10.0	11.1	12.6	14.3	2.0	1.3	1.3
Male part-time	3.0	3.7	5.5	7.4	4.4	3.9	3.1
Female part-time	10.7	12.1	12.8	13.5	2.5	0.5	0.5
Male self-employed	5.9	7.4	8.0	8.5	4.4	0.8	0.6
Female self-employed	2.1	2.5	2.9	3.4	4.1	1.3	1.7
Total Employment	52.3	59.0	65.5	73.1	2.4	1.1	1.1

Source(s) : Cambridge Econometrics, August 2006.

Employment by type and occupation

The types of jobs expected to be delivered under this scenario are such that growth in male full time jobs is expected to see the strongest boost (see Table 5.4). As the jobs generated under this vision are expected to be higher skilled, and requiring higher qualifications, growth in the higher order occupations is expected to be much stronger than under the other visions (see Table 5.5).

TABLE 5.5: EMPLOYMENT BY OCCUPATION IN BRAINTREE - VISION 3

	2000	2005	2015	2025	2000 -2005	2005 -2015	2015 -2025
				(000s)			(% pa)
Managers & Senior Officials	7.6	8.8	10.7	12.9	2.9	2.0	1.9
Professional	5.8	6.8	8.2	9.9	3.4	1.9	1.9
Associate Professional & Technical	6.7	8.1	9.6	11.4	3.7	1.8	1.7
Administrative & Secretarial	8.3	9.1	9.3	9.4	1.8	0.2	0.1
Skilled Trades	7.0	7.6	8.0	8.4	1.9	0.4	0.5
Personal Service	3.2	4.2	5.2	6.1	5.7	2.1	1.8
Sales & Customer Service	3.2	3.6	4.6	5.8	2.6	2.4	2.3
Process, Plant & Machine Operatives	4.7	4.7	4.6	4.6	0.1	-0.1	-0.1
Elementary	5.9	6.0	5.2	4.6	0.4	-1.4	-1.2
Total	52.3	59.0	65.5	73.1	2.4	1.1	1.1

Source(s) : Cambridge Econometrics, August 2006.

6 POLICY IMPLICATIONS OF THE VISIONS FOR BRAINTREE

6.1 Introduction

Three visions for Braintree

Chapters 3-5 present three alternative visions for Braintree district to 2025. The three visions are:

- 1 'Business as Usual', in which current trends continue or accelerate
- 2 'Braintree - providing a focus on leisure, heritage and nature', which repositions the district and emphasises the potential of both its assets and location in relation to major areas of growth and change
- 3 'Braintree - where ideas take shape', which focuses on the need/opportunity within Braintree to regenerate the economy locally

As well as describing how the district might look under each of the three visions, economic scenarios were developed using CE's Local Economy Forecasting Model (LEFM) to give a quantified indication of how the structure of the economy might vary under each vision. This chapter gives a brief outline of the desirability or otherwise of achieving each vision, and then looks at the actions (or inaction) required to achieve each vision.

6.2 The Braintree District Economy Under Alternative Visions

Vision 3 would see the strongest economic growth...

Tables 6.1-6.3 show the results, in terms of growth, of the three alternative visions for the Braintree district economy. Table 6.1 shows that, overall, Vision 3 is expected to lead to the strongest growth of the economy. This is not surprising, given the assumptions underlying the vision, moving towards a higher-knowledge economy benefiting from activities relocating from London. If we assume that Vision 1, which essentially would be expected to arise out of a policy of 'do nothing', is less desirable than the other two, then the most useful comparison to make is between Visions 2 and 3.

...and the greatest improvement in the skills base

Under Vision 3, there would be a focus on improving the skills of the residents in the district. By increasing the likelihood that firms offering better quality jobs with higher earnings will locate in Braintree, this will encourage residents to take jobs in the district, and so could reduce the amount of out-commuting. Despite the increased economic activity in the district, therefore, peak-time congestion on routes in and out of the district could in fact be reduced under this vision. The out-migration of younger residents, in search of better career opportunities, would also be likely to be reduced.

TABLE 6.1: HEADLINE GROWTH IN BRAINTREE UNDER EACH VISION

	2005 -2015	2015 -2025
GVA		(% pa)
Vision 1	2.7	2.6
Vision 2	2.7	2.6
Vision 3	2.8	2.9
Household Income		
Vision 1	3.2	3.0
Vision 2	3.2	3.1
Vision 3	3.3	3.2
Employment		
Vision 1	0.9	0.8
Vision 2	1.0	0.9
Vision 3	1.1	1.1

Source(s) : Cambridge Econometrics, August 2006.

TABLE 6.2: GVA GROWTH IN BRAINTREE UNDER EACH VISION (% PA)

	Vision 1		Vision 2		Vision 3	
	2005 -2015	2015 -2025	2005 -2015	2015 -2025	2005 -2015	2015 -2025
Agriculture etc	-0.6	-0.7	3.5	4.4	-0.6	-0.7
Mining & Quarrying	1.0	0.6	1.0	0.6	1.0	0.6
Manufacturing	1.4	1.2	1.4	1.2	1.8	2.0
Electricity, Gas & Water	2.1	2.3	2.1	2.3	2.1	2.3
Construction	2.6	2.7	2.6	2.7	2.6	2.7
Distrib.,Hotels & Cater	2.7	2.5	2.4	2.3	2.4	2.4
Transport & Comms.	3.7	4.2	3.5	4.0	3.5	4.0
Fin. & Business Services	3.2	3.2	3.1	3.2	3.6	4.0
Government & Other Serv.	3.1	2.6	3.1	2.8	3.2	2.9
Total	2.7	2.6	2.7	2.6	2.8	2.9

Source(s) : Cambridge Econometrics, August 2006.

TABLE 6.3: EMPLOYMENT GROWTH IN BRAINTREE UNDER EACH VISION (% PA)

	Vision 1		Vision 2		Vision 3	
	2005 -2015	2015 -2025	2005 -2015	2015 -2025	2005 -2015	2015 -2025
Agriculture etc	-4.4	-5.1	-0.4	-0.2	-4.4	-5.1
Mining & Quarrying	-0.9	-1.0	-0.9	-1.0	-0.9	-1.0
Manufacturing	-0.9	-1.1	-0.9	-1.1	-0.7	-0.7
Electricity, Gas & Water	-0.6	-0.8	-0.6	-0.8	-0.6	-0.8
Construction	1.9	1.4	1.8	1.4	1.8	1.4
Distrib.,Hotels & Cater	1.0	0.7	0.9	0.9	1.0	0.9
Transport & Comms.	1.6	1.9	1.4	1.6	1.4	1.6
Fin. & Business Services	1.4	1.4	1.4	1.4	1.8	2.2
Government & Other Serv.	1.3	0.9	1.4	1.1	1.5	1.2
Total	0.9	0.8	1.0	0.9	1.1	1.1

Source(s) : Cambridge Econometrics, August 2006.

Vision 2 would see a stronger emphasis on leisure and tourism

Under Vision 2, most of the additional growth in the economy is expected to be driven through increased leisure and tourism growth in the district. Thus, retailing, hotels & catering, and miscellaneous services (which include sporting and leisure activities) would be expected to see the strongest growth. Agriculture could also benefit under this scenario, through increased spending on local produce, and alternative, leisure, uses of farms and rural land.

A number of negative aspects of Braintree would remain...

Under this Vision 2, however, the skills base of residents in the district would not be improved much, as the jobs available would not require high skill levels. The number of residents commuting out of the district would continue to rise, as would the out-migration of younger residents in search of better career opportunities.

...although a number of aspects of Vision 2 would be desirable

Focusing on the purely economic aspects of the scenarios ignores a number of desirable aspects of Vision 2. For example, under this vision the rural economy would be more likely to benefit than under Vision 3 resulting, perhaps, in more cohesion within the district.

A focus on leisure pursuits, and on maintaining and improving the countryside would improve the standard of living for residents of the district. It may be that the increased attraction of the district encourages more people to live and work in Braintree, rather than commute elsewhere. The increasing opportunities to work from home, brought about by the wider availability of broadband internet access, make this an even more likely outcome, and so this Vision could lead to better prospects for other areas of the economy anyway.

A combination of Visions 2 and 3 is likely to be desirable

In reality, some combination of visions two and three is likely to be most desirable, and so a mixture of the actions described in the next section would need to be put into place.

6.3 Realising the Visions

For each of the three visions, we set out some of the actions (or non-actions) that would be needed to effect the associated outcomes.

Vision 1: Business as Usual

Vision One, 'Business as Usual', outlines a vision for the future where Braintree District has not managed to capitalise on the potential benefits of nearby growth, or to carve out a more distinctive niche and identity. Instead some of the key trends of the recent past are continued or even accelerated.

The actions resulting in this scenario are both positive and more passive, where the District has not fully engaged with wider patterns of change which may appear to be outside its control. For example, the District remains characterised by high levels of out-commuting, lower-quality jobs and the consequent out-migration of young people together with the in-movement of people who want to enjoy Braintree's pleasant quality of life (and relatively low house prices) but work elsewhere, notably London.

Realising this vision would be relatively straightforward: much of it might happen if the District continues to operate as at the present. To accelerate the changes, it might in addition:

- promote the District as a convenient location for businesses and commuters
- develop planning policies to ensure the growth of appropriate niche retail and outlet centres
- implement planning policies to limit inappropriate land use including 'bad neighbour' industries
- promote Braintree as a suitable location for distribution activities located mid way between Stansted Airport and the Haven ports.

This scenario is not particularly desirable, although the district would remain a relatively attractive place to live. However, quality of life may be lower than it is today.

Vision 2: Braintree - providing a focus on leisure, heritage and nature

Vision Two, 'Braintree - providing a focus on leisure, heritage and nature', sets out a vision for Braintree of a future where the District is known for the quality of its retail and leisure offer which in turn is linked to the quality of its environmental assets.

Achieving this vision will require the development and strict application of planning policies to:

- encourage the development of high quality leisure and recreation facilities

- protect the unique character of the rural areas of the District from inappropriate land uses
- minimise warehousing development
- encourage appropriate uses of built premises in town centres for shops and restaurants.

This scenario requires the provision of strong business support. Encouraging the development of the District as a high-quality leisure destination depends on the availability of adequate facilities and a good range of appropriate visitor attractions.

TABLE 6.4: VISION 1: BUSINESS AS USUAL

Outcome	Indicative action required	Wider causes
Growth in housing outstrips growth in employment	Provision of additional housing (see RSS)	Failure to encourage employment growth
Manufacturing sector disappears	Positive decision to reduce ‘bad neighbour’ activities in some cases (planning policies)	Competition from overseas or other areas of UK
		Failure to capitalise on local/regional opportunities
Growth in employment in distribution sector	Capitalise on rail, sea and air links	
	Provide warehousing opportunities	
Increase in number of warehouses servicing Stansted and Haven Gateway	Capitalise on air, sea and road links	
	Promote Braintree as convenient, mid-point location	
Increased congestion and pollution	Encouraging haulage and road use	Consequence of actions above
Little investment in skills levels		Failure to engage with skills needs of area
		Failure to tap into wider funding streams and opportunities
High levels of commuting with lower wages paid locally	Service jobs available locally	District remains an attractive place to live but few high-quality jobs provided locally
People employed locally priced out of housing market		Continued pressure on housing stock (from commuters)
		Affordable housing provision not keeping pace with demand
		Dearth of well-paid local jobs
Growth of niche retail sector but decline in town centres	Planning policies to encourage niche retail developments	
	Expansion in existing outlet centres	
Outmigrating of young people		Not enough attractive career opportunities provided
Ageing population		People already living in District decide to stay
		Good quality of life attracts retirees
Low levels of entrepreneurship and business competitiveness		Little investment above current levels in developing business opportunities and encouraging entrepreneurship in schools and colleges

TABLE 6.5: VISION 2: BRAINTREE - PROVIDING A FOCUS ON LEISURE, HERITAGE AND NATURE

Outcome	Indicative action required
High quality leisure and recreation facilities	Planning policies to encourage quality developments
	Positive steps taken to actively attract high profile and prestige operators
	Promotion of Braintree outside District as attractive and accessible place to visit
	Promote Braintree as attractive location for business (large pool of affluent consumers within short travelling distance)
Excellent transport links	Lobby for dualling A120
	Encourage upgrade of rail line to Braintree town
Attractive rural environment	Planning policies to protect rural areas
	Active promotion of Agri-environment schemes together, perhaps, with attempts to link these more strongly to tourism
	Education campaign: environmental awareness
Increased numbers of visitors (link to London 2012)	Promote the District's assets nationally and potentially internationally
	Forge closer links to the 2012 authorities and ensure that connections to Braintree are forged seriously
Appeals to affluent consumers	Encourage high-quality service providers to set up or open branches in Braintree
	Rates reduction for independent shops
Cultural centre: music and theatre festival	Promote high profile cultural events in area
	Provide funding for 'culture week'
	Promote Great Leighs Racecourse, perhaps with links to other established equine centres
Range of outdoor activities, new outdoor nature centre	Encourage farm businesses to diversify
	Explore funding opportunities for educational nature centre
Business diversification: farm stay and farmers' market	Provide grants and support for business diversification within the context of a District-wide strategy and business plan
Specialist local shops and outlet centres	Encourage high-quality retail business to set up or open branches in Braintree
	Planning policies to encourage appropriate development of retail opportunites
Improved restaurant and bar offering	Encourage high-quality business to set up or open branches in Braintree
	Planning policies to encourage appropriate development of retail opportunites
Development of warehousing minimised	Planning policies
Jobs created in service sector although out-migration of young people will continue	Encourage service sector employment growth

Business support should be provided to larger business wishing to relocate to the District (thus improving the quality of jobs available locally), as well as to smaller businesses to encourage diversification. For example, farms could offer farm stay visits or B&B accommodation, as well as producing high-quality local foodstuffs for sale at local markets. The scenario also suggests that an outdoor nature centre could be developed, and small businesses such as cycle or canoe hire could be encouraged to locate nearby, providing additional visitor attractions. The provision of small grants for environmental business might be appropriate.

Additional actions on the part of Braintree District Council would include marketing the District both nationally and internationally as a great place to work, live and visit. This marketing could focus on the District's environmental appeal as well as cultural attractions, for example a yearly Council-supported music and theatre festival. In terms of marketing, the District ought to forge particular connections to nearby growth areas and growth points and, in those contexts, seriously 'sell' its assets and its offer.

For this scenario to materialise, Braintree District Council would have to make a concerted effort to market the District as an appealing place to visit, as well as ensure that planning policies encouraged appropriate development and that high-quality business and attractions were supported. The Council should take the lead in focusing on the environmental benefits and opportunities offered by the District, and ensure that these are safeguarded and used appropriately.

Vision 3: Braintree - where ideas take shape

Vision Three, 'Braintree - where ideas take shape', also requires the implementation of a strong strategic vision with links across planning policies, marketing, business support mechanisms and skills development.

In advancing the scenario, there will be a need to forge key strategic alliances with other locations in the East of England, particularly those with strong knowledge economy assets; in this context, it will be important to recognise that competition will be fierce. However if the District Council is very proactive, it might be possible: might there, for example, be scope to fund an outpost of an established Cambridge-based innovation centre, using the established branding and expertise and giving local entrepreneurs the opportunity to benefit?

Skills training and supporting educational opportunities will be key to achieving this scenario based around a strong knowledge-driven economy with high-quality jobs. The District should encourage improved skills provision and training, as well as building links between local educational establishments and businesses. Developing the local skills base would also prove attractive to business looking to (re)locate within the District.

The scenario is premised on high-quality jobs being available within the District, capitalising on the region's success in research and innovation. The District should continue to encourage business start-ups, and focus in particular on assisting more specialised businesses with potential for higher-value employment creation, such as high-tech and IT start-ups. Attracting inward investment is also necessary and would raise the profile of the District.

Again, the District should ensure that strict planning policies are in place to achieve this vision. These should include the limiting of warehousing and distributions functions, providing new office space where appropriate, perhaps allowing the development of new business parks and innovation centres, as well as allowing the conversion of smaller units into larger spaces for growing businesses, so that the District can provide the facilities appropriate to a centre of high-quality manufacturing. Planning policies should also be geared towards encouraging an improved retail offer in the towns. Business support should be provided to ensure a diverse range of businesses in rural areas.

TABLE 6.6: VISION 3: BRAINTREE - WHERE IDEAS TAKE SHAPE

Outcome	Indicative action required
Strong knowledge-driven economy with high-quality jobs	Improve skills base
	Build intra-regional links with centres of innovation
	Provide high-quality locations for employment within District boundaries
	Influence the growth agenda in knowledge-based economies elsewhere in the region through, for example, the creation of linkages with the Greater Cambridge Partnership
Reduced out-commuting	Improve jobs on offer within District by attracting wider range of firms
Business start-up rate increased	Set up business champion programme
	Encourage the development of an active entrepreneuship network, linked - perhaps - to a "'Braintree Dragons'Den"
	Continue to provide business support
	Provide enhanced premises for new start businesses, linked to the provision of grown-on space
	Investigate the scope for forging an alliance with an established Innovation Centre and creating an outpost in Braintree
	Promote Braintree nationally and internationally as a location for investment, perhaps linked with Stansted Airport and the Haven ports
Increased inward investment	Promotion of Braintree nationally as excellent location for investment
Excellent communication links	Build on rail and air links in particular.
	Promote Braintree in terms of travel times from major nodes.
Centre of high-quality manufacturing	Planning policies - encourage certain types of land use
	Differential rates for attractive business uses
	Promote Braintree as District with history of manufacturing expertise
Distribution and warehousing limited	Planning policies
New business parks and workspaces for growing businesses	Planning policies
	Adapt smaller units
Provision of office space where appropriate	Adapt existing units
	Planning policies to encourage development of office space for back-office functions
Broadband roll-out across District	Offer grants to local businesses to get online and lobby telecommunications providers for cheaper and reliable access to broadband across the District
	Provide active support to encourage businesses, households and other organisation to increase their use of the internet
Improved skills provision and training	Encourage young people to stay on at school or college
	Invest in work-related training
	Provide adult education at reduced cost
	Consult business on what skills they would like their employees to have
Improved retail offer in towns and diverse range of business in rural areas	Planning policies - encourage certain types of land use
	Differential rates for attractive business uses
	Encourage high-quality business to set up or open branches in Braintree
Reduction in out-commuting	Improve job opportunities with the District
Attractive career opportunities for young people	Promote Braintree as ideal relocation destination (eg businesses relocating from Chelmsford)
Reduced carbon footprint	Reduce commuting

Effective marketing should link into the planning policies outlined above by focusing on the District’s appeal as a centre for high-quality manufacturing with a strong skills base and history of excellence in manufacturing. Improving the availability of broadband across the District (perhaps by providing grants to smaller businesses) as well as encouraging a diverse range of new businesses would improve career prospects for younger people. This availability of labour would assist further in attracting inward investment to Braintree District.

7 CONCLUSIONS

The earlier chapters of this report considered the current socio-economic position of Braintree district and then set out three alternative Visions for the district's future to 2025. This final chapter provides some reflections on the Visions and sets out some questions and challenges for the District Council as it moves forward.

7.1 Changing spatial development context

As the context for this concluding chapter, it is instructive to consider the findings of the Panel's report on the draft East of England Plan. This was published during the course of this study following the Examination in Public which concluded earlier in the year[1]. In considering Braintree's situation, the Panel made three key observations:

- that Braintree district should not be included within a designated sub-region but instead should be covered by the overall policy of the spatial strategy
- that rapid recent housing growth in Braintree has not been matched by employment growth and that Braintree residents already have some of the longest average travel to work distances in the region
- that there should be no uplift to the proposed housing allocation which will therefore remain at less than half the previous Structure Plan rate. The implication is that this will reduce the rate of delivery experienced during the construction of Great Notley and other developments.

The Panel's observations with regard to Braintree district need to be seen alongside those for adjacent areas. Chelmsford, Harlow and Colchester have all been identified as Key Centres for Development and Change and the intention is that housing and employment development - which in some cases will be substantial - should be concentrated at these locations. All three of these Key Centres are already substantially bigger than the urban areas within Braintree district. Located about 20 kilometres to the south, the situation with regard to Chelmsford is noteworthy for the Panel argued that greater weight should be attached to the economic role of the town; this could have important implications for employment growth in Braintree. The Panel acknowledged that the employment growth targets for Colchester were challenging but considered them to be achievable as long as key interventions, including with regard to infrastructure, were made. The future of Harlow provoked a strong debate and although proposals for development on land north of Harlow were rejected, the Panel still argued for growth to the east, south and west of the town. It is within this dynamic growth context that Braintree's Visions need to be appraised and taken forward.

1 East of England Plan December 2004 - Panel Report following the Examination in Public, June 2006 Volume 1.

7.2 Reflecting on the Visions

The clear implication of the draft East of England Plan - and the panel report following the EiP - is that over the next 15-20 years, Braintree will be surrounded by places which are growing fast and changing quickly. For the district, this presents both opportunities and threats and the Visions presented in Chapters 3-5 set out different potential responses to it.

Vision 1 is rather passive, but the other two Visions are - in different ways - quite ambitious. In considering its priorities for the future, Braintree District Council will need to think hard about resourcing and deliverability, as well as about the desirability of different outcomes. It should also - arguably - give serious consideration to issues surrounding long term sustainability. As the Panel observed, Braintree residents already have some of the longest average travel to work distances in the region and in the context of national policy shifting progressively towards carbon neutrality, there is some case for suggesting that Vision 1 is not actually a long term option. On the other hand - compared to districts elsewhere in the UK - the argument could also be made that Vision 1 is acceptable in economic terms: the residents of Braintree will have reasonable access to a number of employment centres, all of which are growing quickly.

In pursuing either Vision 2 or Vision 3, Braintree will be competing with a good number of other locations within the East of England and - in the case of Vision 3 - further afield. Some of these are likely to be far better resourced than Braintree.

Moreover - particularly since the publication of the Sustainable Communities Plan in 2003 - it is important to acknowledge that the challenges associated with both Vision 2 and Vision 3 have certainly grown. For example, a few years ago, the claim was made that "Cambridge is full" but - as Green Belt boundaries have been reviewed - the "ground rules" have changed and at least some partners within the Cambridge sub-region have expressed concerns about its ability to generate sufficient local jobs given the rate of population growth. Hence the notion that there might be "spare" economic growth potential available to be redistributed from regional hotspots is now seriously outdated. Braintree might - potentially - develop complementary relationships with some of the Key Centres, but it will need to play its part in defining and effecting these.

The context, therefore, is challenging. Because of this, creativity - and a strong sense of purpose - will be needed in moving forward. Specifically:

- it will be important to recognise that Braintree District Council will not succeed in delivering either Vision 2 or Vision 3 if it operates in isolation. It will need to work in partnership with other local authorities and with agencies and organisations outside the district if positive change is to be effected and sustained. If Braintree is not part of wider regional and sub-regional thinking, the district is very likely to be overlooked given the number, scale and complexity of development agendas in proximate locations elsewhere
- at the same time, it will be very important that local people are positively engaged in defining - and then effecting - Braintree's futures, recognising that the solutions for Braintree town may well differ from those in either Witham or Halstead. The Visions are not mutually exclusive and interviews with local stakeholders showed differing levels of support for different aspects of each Vision. A combination of

Visions 2 and 3 was seen as providing the best future for Braintree district, and consultees had innovative suggestions in terms of potential strengths to develop. Indeed, the district may well want to pursue elements of all three Visions identified here but to do so in different ways - and to different extents - in different places. In this context, strong but empowering local leadership will be important

- third, it will be imperative, from the outset, to accept that there is no “fund for Braintree” waiting to be dispersed to deliver any of the Visions either individually or in combination. Within the different Visions, some components may be unaffordable whilst others - probably the majority - will require creativity and collaboration, not least with the private sector, if serious progress is to be made.