

Manor Royal Economic Impact Study Final Report

Manor Royal Business District

January 2018

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Executive Summary

This report has been prepared by Lichfields on behalf of the Manor Royal BID Company Limited in partnership with Crawley Borough Council and West Sussex County Council. It presents the results of an Economic Impact Study (EIS) of the Manor Royal Business District in Crawley.

The aim of the study is to build on existing evidence to understand the constraints and opportunities that face Manor Royal, consider the different mechanisms that are available to promote economic growth at Manor Royal, and provide recommendations and a way forward that will enable Manor Royal Business District to prosper. The EIS is intended to identify potential actions to allow the Manor Royal Business Improvement District (BID) and its key local authority partners to understand what the future direction of Manor Royal needs to be, practically how this might be delivered and the respective role of each organisation in conjunction with businesses and other stakeholders.

The key findings of the study can be summarised as follows:

Manor Royal's Economic Footprint

Manor Royal makes a significant contribution to the economy of Crawley and the Gatwick Diamond, employing significant concentrations of people, supporting supply chain jobs and contributing to the public purse. There are currently 612 businesses active within the BID area with significant numbers in the wholesale and transport and manufacturing sectors. 22,400 people are directly employed in Manor Royal with an estimated 10,400 jobs supported in the supply chain. Manor Royal generates £1.23bn of direct GVA per year and is estimated to generate an additional £0.54bn indirectly through supply chain activities. The BID area contains some 866,000sq.m of commercial floorspace, more than 90% relating to B class uses. Business rates payments across the business district is estimated to be equivalent to £34.1m in 2016, while employees and employers are estimated to generate £163m of tax for the public purse through income tax and national insurance contributions.

Property Market Signals

Manor Royal is located in the Gatwick Diamond commercial property market area. Due to the size of the business district, it also competes against other large centres outside of the Gatwick Diamond such as Croydon, Basingstoke and Guildford.

The industrial property market in Manor Royal is currently reported to be tight. Rents have increased by 40% in the last 18 months and the area of developable land has significantly decreased as a result of large recent speculative industrial developments. If occupiers cannot find space in Manor Royal they typically relocate to other places in the Gatwick Diamond (i.e. Burgess Hill) and other locations further away such as Croydon. There are currently gaps in the supply of smaller industrial units ranging in size from 400-500 sq.ft and larger industrial units over 20,000sq.ft. A major pinch point is the lack of available land now for developing new premises to meet demand, which is similar to other parts of the M23 corridor.

The office market in Manor Royal is comparatively less buoyant than the industrial market. What demand exists at the moment is generated by interest from professional services and SMEs. However, there is not currently considered to be sufficient demand to encourage speculative office development in Manor Royal.

Market Positioning of Manor Royal

In comparison to other existing business parks in the wider South East, Manor Royal has a number of key advantages including good strategic access links, a wide variety and mix of uses and a developing business community through the work of the BID. There are also some areas which could be improved upon to enhance the offer of the business district such as improved branding, access to amenities and landscaping.

The amenity and facilities offer of Manor Royal is currently spread throughout the business district, albeit with provision somewhat uneven spatially with a key centre at County Oak retail-park but no dedicated facilities hub. In terms of its service offer, Manor Royal is relatively well served compared to other similar business districts such as Brackmills and Maylands, although the service offer of both districts is now being improved through new hub facilities, delivered through private sector investment either by developing a brand new facility or by combining the development of a hub as part of a wider development.

Continuing to centralise the Manor Royal brand and offer of the BID could help improve the appeal of the business district. Manor Royal has a more centralised and distinguished brand than business parks with similar characteristics such as Brooklands and Maylands. However, more recently developed parks such as Crossways have been successful in establishing a strong brand identity.

There are a number of emerging business park opportunities that could come forward over the coming years and compete to some extent with Manor Royal for occupiers, including at Longcross and Burgess Hill both of which are closest to coming on the market. North of Horsham could act as a medium-term competitor to Manor Royal, subject to phasing and delivery. Future development land in Crawley is currently constrained due to Gatwick Airport safeguarding; other nearby employment developments such as South of Horley is only at allocation phase at present, but could emerge as a significant competitor particularly if the development capacity of Manor Royal remains constrained going forward.

Scope for Intensification and Growth

In the context of reducing land availability at Manor Royal and increasing pressure on a finite supply of land to accommodate economic growth and business development, the study has reviewed a number of intensification opportunities at Manor Royal to understand what could realistically be achieved in terms of new development, and practically how this can be delivered. A portfolio of 16 sites within Manor Royal has been identified for the purposes of this study which are considered to theoretically have potential to be used more intensively and efficiently in future (over the Local Plan period to 2031). Sites have been considered either for intensification (those with surplus space) and/or full redevelopment (assuming full clearance of the existing site). The analysis identifies significant scope for accommodating new development across these sites in Manor Royal, equivalent to a maximum capacity of 173,000 sq.m for industrial uses and 103,000 sq.m for office uses.

The ability to redevelop sites across Manor Royal more efficiently and effectively in future will depend to a large extent upon the provision of supporting infrastructure to 'keep up' with the pace and nature of development. Specific infrastructure issues and constraints are considered in more detail through technical evidence base studies, although of particular note and relevance to the EIS are car parking provision and road/highways capacity, both of which have provided significant barriers in bringing forward intensification opportunities at Manor Royal in recent years. Whilst responsibility for funding major infrastructure works ultimately rests outside of the BID itself, there could be a useful co-ordination and advocacy role for the BID to play in raising awareness of infrastructure issues of critical importance amongst its public sector partners to ensure that infrastructure funding is spent on tackling those issues of highest priority within the BID area.

Recommendations and Action Plan

The study analysis is drawn together to identify key overall recommendations for supporting the future growth of Manor Royal, and more specifically, outlines an action plan to help guide the activities of the BID and its partners. The current Masterplan for Manor Royal was prepared in 2010 to provide strategic direction for the future growth and development of the Manor Royal Business District. A broad review of the current Masterplan indicates that many of its recommendations remain relevant and justified in light of progress that has been made since 2010 and the changed circumstances in Manor Royal itself and the wider environment in which it operates and looks to compete. These are combined with additional recommendations and suggested actions to form a summary action plan for the BID and its partners to use to help shape its delivery programme and day-to-day activity over the coming years. This draws on the analysis

undertaken as part of the EIS on constraints and opportunities that Manor Royal faces, considers the different mechanisms that are available to promote economic growth at Manor Royal, and provides recommendations and a way forward that will enable Manor Royal Business District to prosper.

The key challenges faced by Manor Royal in maintaining its role – as the South East’s premier mixed use employment location and its competitiveness as a business location – over the coming years relate to land supply and the ability to accommodate development within its existing boundary, maintaining the profile of Manor Royal against the backdrop of strong and growing competition, and a number of operational, amenity and infrastructure issues which if addressed, have the potential to greatly enhance Manor Royal’s appeal to business occupiers over the coming years. Actions are grouped around the key themes of quality of place, business support and engagement, brand positioning and promotion, planning tools and mechanisms, business amenities and infrastructure and facilities.

Economic Footprint

Manor Royal is the pre-eminent business district in Crawley and the Gatwick Diamond. Today more than 600 businesses operate in Manor Royal, employing over 22,000 people and making a significant contribution to the UK economy.



Property and Land



218ha

Total land area



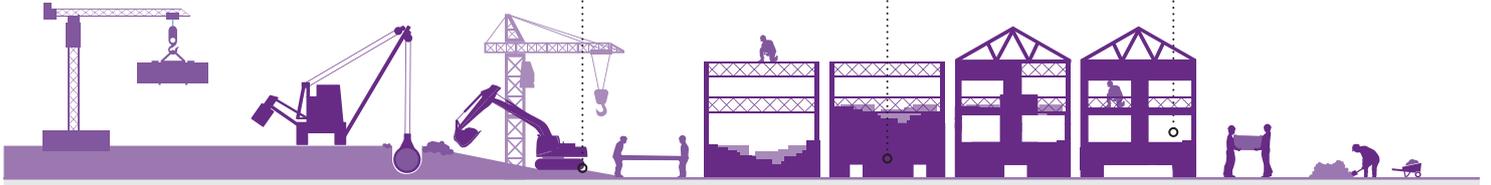
866,000 sq.m

Commercial floorspace



740

Business units



Business and Jobs



620

Businesses



22,400

Direct jobs



10,400

Supply chain jobs



Economic Value



£1.2bn

Direct economic output (GVA p.a.)



£0.5bn

Supply chain economic output (GVA p.a.)



Fiscal Contribution



£67m

Income tax (p.a.)



£106m

National Insurance (p.a.)



£34m

Business rate revenue (p.a.)



Key Sectors



Information and Communication

- 1,800 Direct and supply chain jobs
- £161m Direct and supply chain economic output (GVA p.a.)



Manufacturing

- 7,200 Direct and supply chain jobs
- £485m Direct and supply chain economic output (GVA p.a.)



Wholesale and Transport

- 9,900 Direct and supply chain jobs
- £519m Direct and supply chain economic output (GVA p.a.)

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1.0 Introduction

- 1.1 Manor Royal BID Company Limited (“MRBD Limited”) in partnership with Crawley Borough Council and West Sussex County Council commissioned Lichfields to undertake an Economic Impact Study (‘EIS’) of the Manor Royal Business District in Crawley.
- 1.2 The scope of works identified by the study brief comprises:
- a An assessment of Manor Royal’s current performance and contribution to the economy, including an assessment of progress made in Manor Royal since the adoption of the 2010 Master Plan;
 - b Conduct a comparison SWOT analysis of Manor Royal to help compare and benchmark Manor Royal against competing business parks, be they planned or existing, to help identify key selling points and areas for improvement. This should take account of any gaps in the Manor Royal offer that may undermine its attractiveness and where action to resolve these issues would help future-proof the business district;
 - c An appraisal of Manor Royal’s future role in the local and wider economy, including land use and the ability of Manor Royal to accommodate different types of development and the feasibility of developing sites at higher densities;
 - d An assessment of the available planning mechanisms that might be practically used in Manor Royal to facilitate appropriate development and help development to come forward more easily e.g. Simplified Planning Zones, Local Development Orders and Neighbourhood Plans. This should include an assessment of the benefit of applying these mechanisms to Manor Royal with recommendations for action; and
 - e A refresh of the Manor Royal Business and Property Report (2014) or data sufficient to allow for this report to be updated.
- 1.3 The report is intended to identify potential actions to allow the Manor Royal Business Improvement District (BID) and its key local authority partners to understand what the future direction of Manor Royal needs to be, practically how this might be delivered and the respective role of each organisation in conjunction with businesses and other stakeholders.

Background

- 1.4 Manor Royal Business District is the largest single business area of West Sussex and the Gatwick Diamond, located in Crawley Borough. The business area takes up approximately one square mile of land, representing 5.7% of the total area of Crawley Borough and 0.13% of West Sussex County.
- 1.5 The business area was designed to accommodate traditional manufacturing and engineering activities as part of the original New Town Plan for Crawley following its designation in 1947. The intention was to create a town with a balanced economy complete with its own industry and places for workers to live. Manor Royal, officially named by Princess Elizabeth in 1950, was designed to be the commercial and industrial heartland of the New Town. The Development Corporation specified industries whose labour requirements could be easily met, including engineering, woodworking, printing and the manufacture of food, drugs and electrical goods. The plan was to build small and large factories next to each other. However, the larger firms concentrated along Manor Royal, Fleming Way and Gatwick Road with the smaller firms mainly

on secondary grid roads. The legacy of this early development is still apparent in the current pattern of development.¹

- 1.6 Manor Royal grew rapidly in the early years, and soon exceeded the original plan to accommodate 8,500 workers. The gradual diversification of the economy alongside the growth of Gatwick Airport led to Manor Royal's evolution away from its traditional manufacturing origins. Masterplanning and related work have been undertaken to help guide the continued redevelopment and improvement in partnership with local businesses and key stakeholders to maintain Manor Royal's position as a leading business location. The site has now effectively reached its physical limits, particularly in the context of safeguarding of land adjacent to Gatwick Airport to the immediate north of Manor Royal in the Crawley Local Plan.
- 1.7 The Manor Royal BID Company was formed in June 2013 following extensive local research and a vote of those companies in the area liable to pay the BID levy, with an adopted business plan covering the 2013-2018 period. A series of tangible changes and improvements have been delivered by the BID across Manor Royal. At the time of this report, the Manor Royal BID was nearing the end of its first 5-year term and preparing for the ballot of a second term for a further 5-year period. In this context, this report provides an opportunity to consider the progress made to date, and the direction of travel and the practical and policy considerations that can maintain the economic function and growth of Manor Royal in a competitive market.

Spatial Definition of Manor Royal

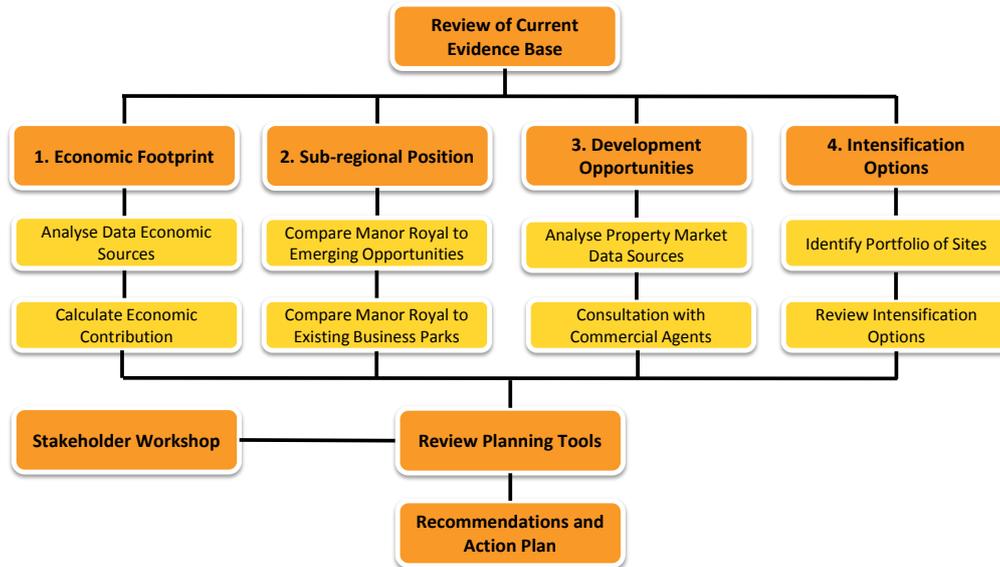
- 1.8 For the purposes of the EIS, the spatial extent of Manor Royal encompasses the area covered by the Manor Royal BID. This differs slightly from the area identified as Manor Royal within the Crawley Local Plan, and excludes the recent development known as City Place which lies just to the north and east of the Manor Royal BID area.
- 1.9 For instance, the Local Plan designation for Manor Royal measures 240ha in total, whilst the BID area is smaller at 218ha. Aside from the fact that City Place does not fall within the BID area, it has not been included within the study area for the purposes of the EIS because it has limited scope for intensification given safeguarding constraints, and comprises a relatively recent development providing modern, purpose-built floorspace.

Methodology

- 1.10 The overall methodology for the study is set out in Figure 1.1. below, comprising four main elements.

¹ A more detailed history is set out in Manor Royal Business District - A Plan for Progress, <http://www.manorroyal.org/assets/int191307.pdf>

Figure 1.1 Study Methodology



Source: Lichfields

- 1.11 The study draws upon consultation with a range of local stakeholders including commercial agents, economic development and business organisations, as detailed in Appendix 1. A workshop to discuss emerging findings was held in Manor Royal in September 2017.
- 1.12 A range of economic and property market data has been incorporated from published and proprietary sources as detailed within the report. In line with market conventions, values (i.e. rents) for commercial space are expressed in £ per ft² although metric units of measurements (i.e. m²) have generally been used elsewhere in the report.
- 1.13 An important consideration for any work of this type is that it is inevitably a point in time assessment. The study has incorporated the latest data, assumptions and other information available at the time of preparation. The accuracy of data derived from third-party sources has not been checked or verified by Lichfields.
- 1.14 The terms of reference for this study do not require specific consideration of the potential employment or economic impacts arising from any additional runway capacity at Gatwick Airport but assumes that the Airport develops to its maximum capacity of 45 million passengers per annum within its existing runway capacity.

Structure of Report

- 1.15 The report is structured into the following sections:
- Section 2.0 sets out the current **economic footprint** of Manor Royal;
 - Section 3.0 provides a summary **policy and evidence review**;
 - Section 4.0 reviews **property market signals** relating to Manor Royal;
 - Section 5.0 considers the **market positioning** of Manor Royal;
 - Section 6.0 identifies **scope for future intensification and growth**;
 - Section 7.0 reviews potential **planning mechanisms for growth**; and
 - Overall **recommendations and an action plan** are set out in Section 8.0.

- 1.16 All references to Manor Royal in the report refer to the Manor Royal Business District area unless otherwise stated.

2.0 Economic Footprint of Manor Royal

2.1 This section quantifies the existing economic footprint and contribution that the Manor Royal Business District makes to the local, sub-regional and regional economy, focusing on the scale of employment, business activity, economic output and economic linkages within the local economy. This provides a baseline position and reviews what progress has been made since the Master Plan was adopted in 2010.

Context

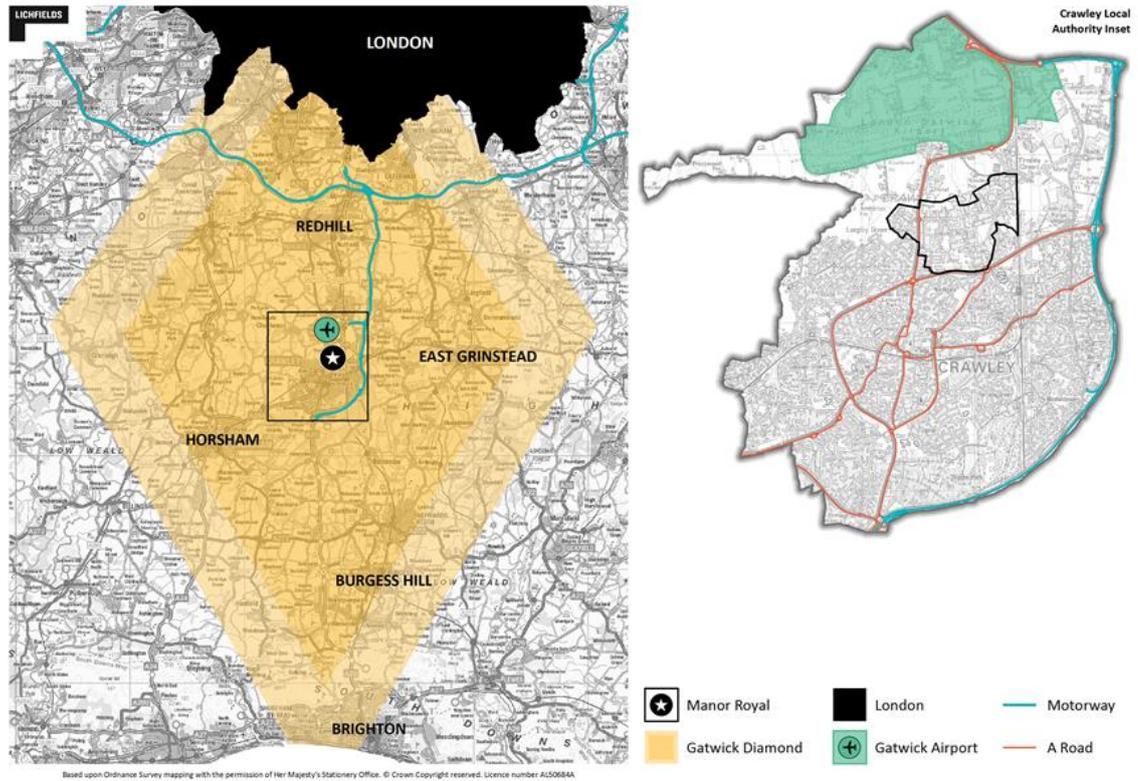
2.2 Manor Royal BID zone covers 218 hectares of land and is home to over 600 businesses and 22,000 employees². The Manor Royal BID Company, the UK's largest "industrial BID", was created in June 2013 in response to issues highlighted in the previous Masterplan based on priorities identified by businesses.

2.3 The business area was designed as part of the Crawley New Town plan, acting as a base for manufacturing and engineering activities. The success of Manor Royal as a business location and growth of Gatwick Airport to become the busiest single runway airport in the world have caused Manor Royal to grow beyond the original aspirations for the business area.

2.4 Today, Manor Royal continues to be a major driver in Crawley's economy alongside Gatwick Airport and remains sub-regionally significant as the largest business area within the Gatwick Diamond. Figure 2.1 shows that Manor Royal is located at the heart of the Gatwick Diamond economic area.

² Business and job numbers are based on postcode level mapping of businesses within the Manor Royal BID boundary using Office for National Statistics (ONS) Interdepartmental Business Database Register (2016) data.

Figure 2.1 Manor Royal Context



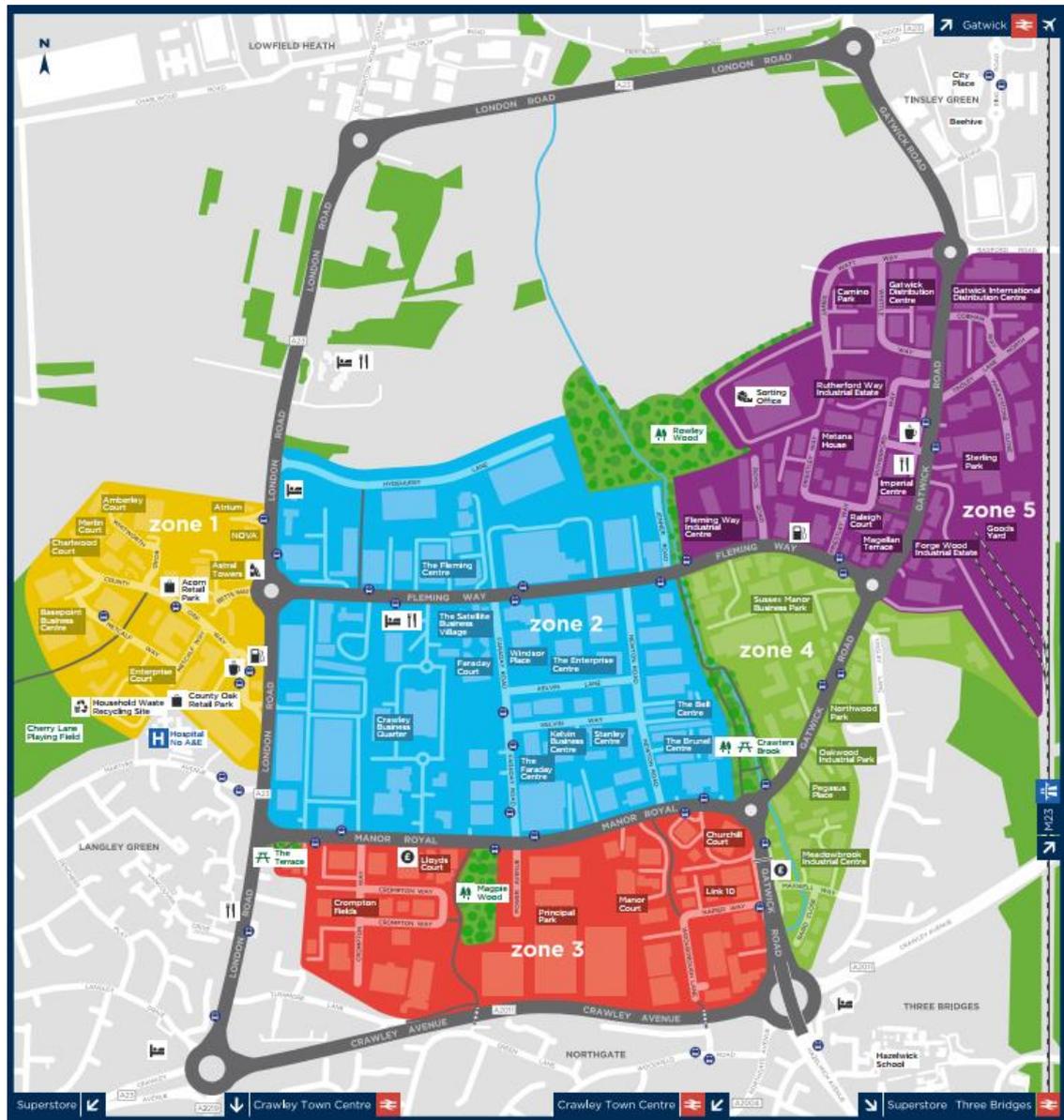
Source: Lichfields

Manor Royal Business District

2.5

The parts of Manor Royal that the BID area incorporates are divided up into five separate zones (see Figure 2.2). The zones include a diverse range of businesses and buildings, including high-end office buildings where multi-national firms are located (e.g. Virgin Atlantic and Deloitte) and warehouses used by businesses as distribution centres (e.g. Tesco and Royal Mail).

Figure 2.2 Manor Royal Zones Map



Source: Manor Royal BID (2017)

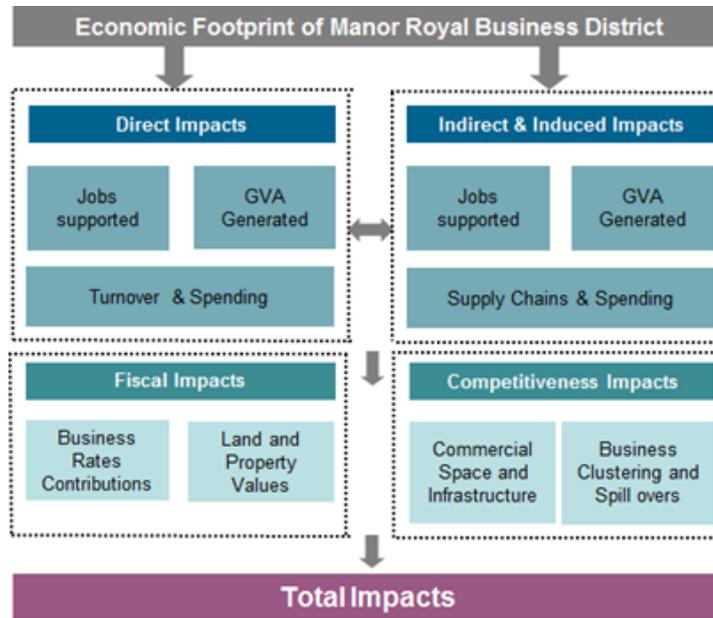
- 2.6 The identified zones do not have a formal status per se but are helpful in terms of describing the site geography.

Economic Contribution

- 2.7 The following analytical framework has been used to assess the quantifiable economic impacts as well as the more qualitative socio-economic contribution made by the Manor Royal Business District. This builds upon best practice and established methodologies for economic impact analysis of this type.
- 2.8 It should be noted that this a point in time assessment and Manor Royal’s economic contribution may change in future years, due to influences such as new occupiers arriving, businesses employing more workers and wider market fluctuations. In addition, some sources of

information are only available for years prior to 2017, so do not take into account more recent developments in the business district.

Figure 2.3 Manor Royal Analytical Framework



Source: Lichfields

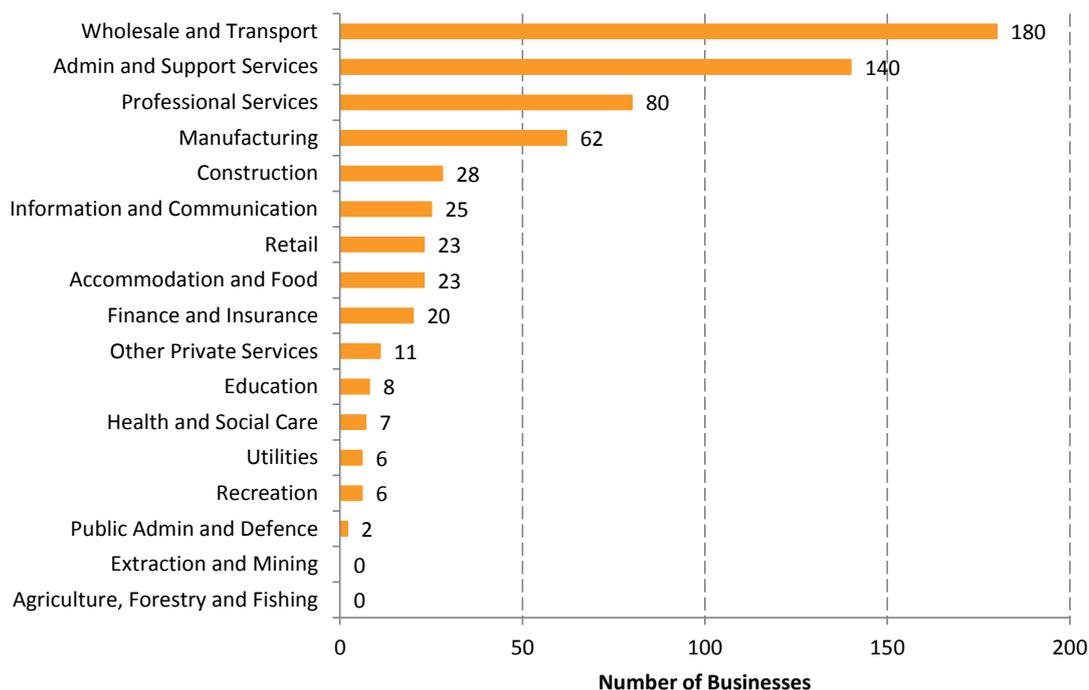
Business Base

- 2.9 The Inter-Departmental Business Register (IDBR) provides information on what companies are located within a seven-digit postcode area, therefore using the dataset it is possible to analyse what employers by sector are located within the BID boundary³.
- 2.10 In 2016 based on the IDBR data, there were 621 businesses located within the Manor Royal BID boundary. These businesses are involved in a wide range of industries as highlighted in Figure 2.4. The sectors with the highest numbers of businesses are wholesale and transport, administration and support services, professional services and manufacturing (180, 140, 80 and 62 respectively)⁴.

³ Note Inter-Departmental Business Register data does not include firms that do not have employees and fall under the PAYE tax threshold. Therefore the number of businesses and level of employment presented in this study for Manor Royal may actually be higher than reported.

⁴ ONS, (2016); Inter-Departmental Business Register.

Figure 2.4 Manor Royal Number of Businesses by Sector (2016)



Source: ONS (2016) / Lichfields

Note figures may not sum due to rounding

2.11 Virgin Atlantic is the single largest employer within Manor Royal. The airline has several facilities in the business district including ‘the Office’ located in the Crawley Business Quarter sub-section of Manor Royal and ‘the Base’ on Fleming Way. Other major employers such as Thales, Elekta, Tesco and Royal Mail manufacture goods or use Manor Royal as a distribution base. The largest ten employers are presented in Table 2.1.

Table 2.1 Manor Royal Largest Employers

Business	Sector
Virgin Atlantic	Wholesale and Transport
Thales	Manufacturing
Tesco	Retail
Royal Mail	Wholesale and Transport
TUI	Administration and Support Services
Elekta	Manufacturing
CGG Services	Information and Communication
Brighton and Hove Bus and Coach	Wholesale and Transport
Alpha Flight	Accommodation and Food
Evans Cycle	Retail

Source: ONS (2016) / Lichfields

Employment

2.12 In 2016, 22,400 people were employed in Manor Royal in a wide variety of sectors (see Table 2.2), equivalent to 25.8% of Crawley Borough’s workforce in the same year. Based upon composite multipliers from the Homes and Communities Agency (HCA) Additionality Guide (2014)⁵, a further 10,400 were employed in the supply chain within the wider region⁶.

⁵ Homes and Communities Agency (HCA), (2014); Additionality Guide 4th Edition.

Table 2.2 Manor Royal Employment by Sector (2016)

Sector	Direct Employment	Indirect Employment	Total Employment
Accommodation and Food	900	500	1,400
Admin and Support Services	3,500	2,500	5,900
Agriculture, Forestry and Fishing	-	-	-
Construction	500	300	800
Education	700	300	900
Extraction and Mining	-	-	-
Finance and Insurance	400	200	600
Health and Social Care	100	100	200
Information and Communication	1,400	400	1,800
Manufacturing	4,800	2,300	7,200
Other Private Services	-	100	100
Professional Services	1,300	500	1,800
Public Admin and Defence	100	-	100
Recreation	100	-	100
Retail	1,300	300	1,700
Utilities	200	100	300
Wholesale and Transport	7,100	2,800	9,900
Total	22,400	10,400	32,800

Source: ONS IDBR (2016) / Lichfields

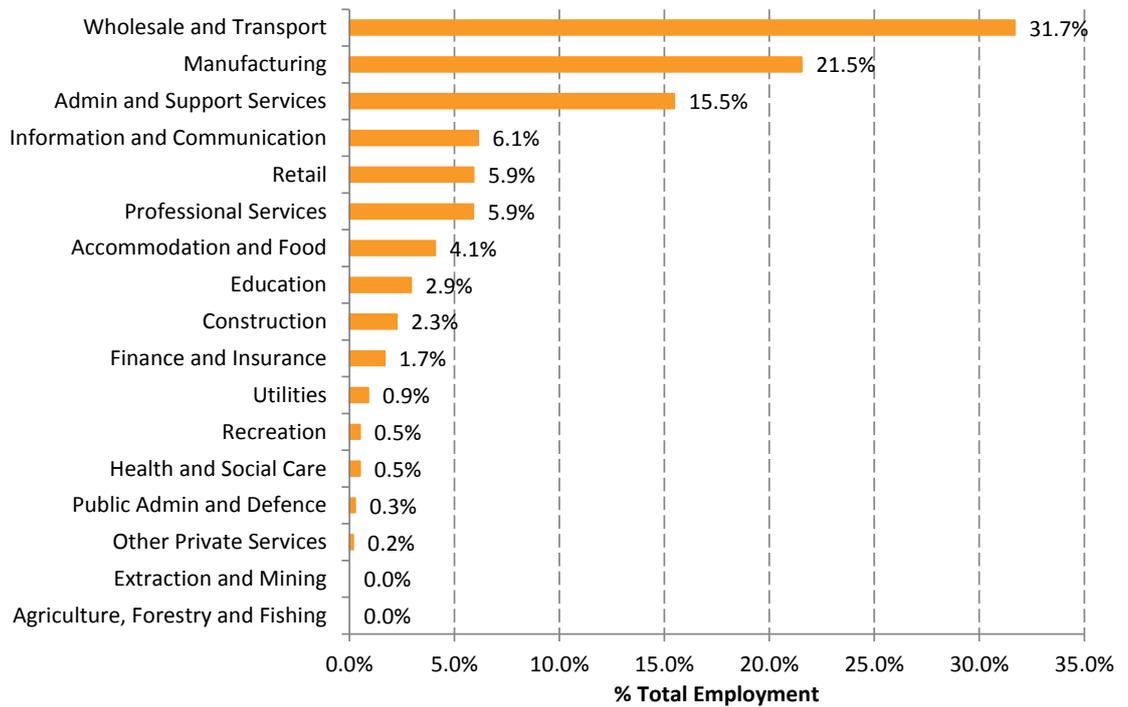
Note figures generated through mapping businesses to a seven-digit postcode level. Figures may not sum due to rounding.

2.13

Figure 2.5 shows the sector employing the most people was wholesale and transport, which is equivalent to 31.7% of total employment in Manor Royal. Other major sectors include manufacturing and administration and support services. The three sectors combined employ 68.7% of the business area workers.

⁶ Note the HCA composite multipliers used were selected based upon what premises each sector is most likely to occupy. The composite multipliers used are as follows: B1 Office 1.44; B2/B8 1.44; Recreation 1.56 and Retailing 1.38.

Figure 2.5 Manor Royal Employment by Sector (2016)



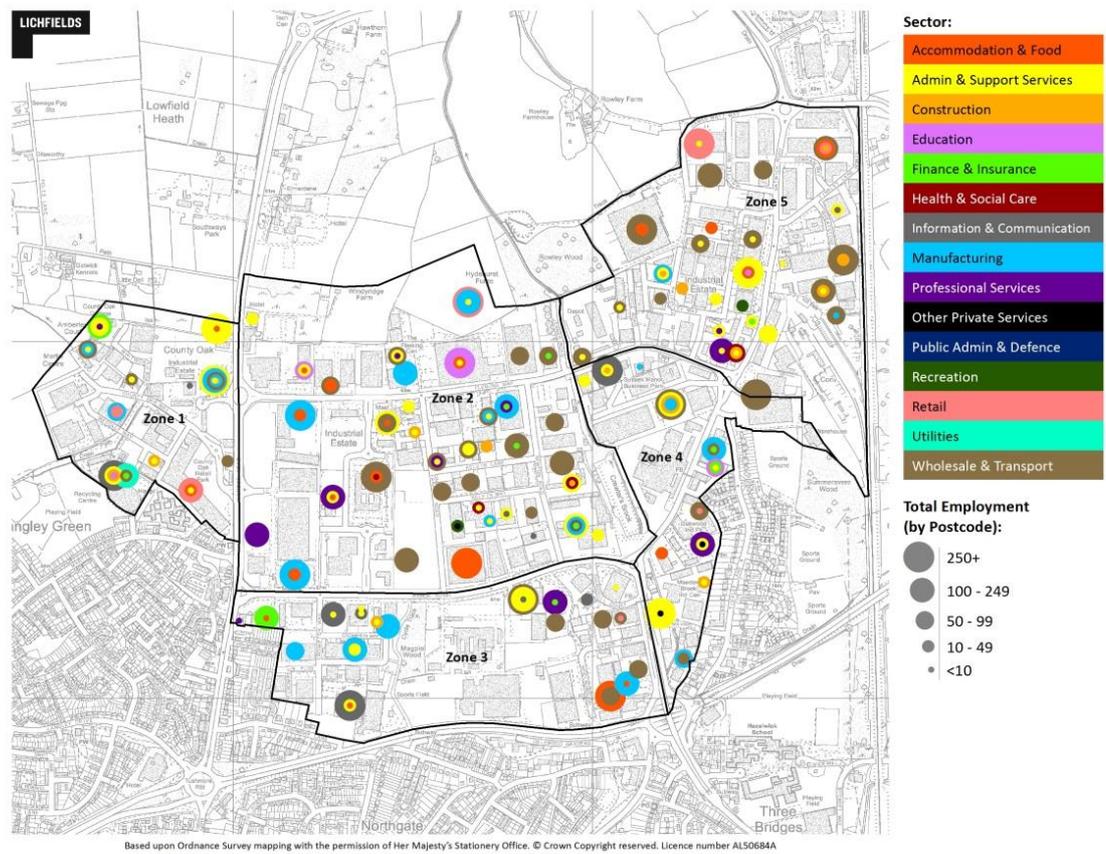
Source: ONS IDBR (2016) / Lichfields

Note figures may not sum due to rounding

2.14

Figure 2.6 shows that wholesale and transport employment is primarily located within Zone 2 and Zone 5 of the BID area. Manufacturing, the second largest sector, has clusters of employment in the northern half of Zone 2 and eastern side of Zone 3. Other employment clusters include a hub of administration and support services firms in the centre of Zone 5 and information and communications businesses on the eastern side of Zone 3.

Figure 2.6 Manor Royal Employment Distribution



Source: ONS IDBR (2016) / Lichfields

Note employment mapped at a seven-digit postcode level

- 2.15 Employment by sector in Manor Royal differs to West Sussex and the South East. The business district has significantly higher proportions of people employed in wholesale and transport, manufacturing and administration and support services (see Figure 2.7). In contrast, lower proportions of workers in Manor Royal are employed in the majority of other sectors such as health and social care, retail and professional services.
- 2.16 The business district more closely matches Crawley, which is expected as a significant proportion of people employed in Crawley work within Manor Royal. This difference between Manor Royal and Crawley is smaller in the wholesale and transport sector, which is likely influenced by the location of Gatwick Airport in the Borough.

Figure 2.7 Difference in Employment to Manor Royal by Sector

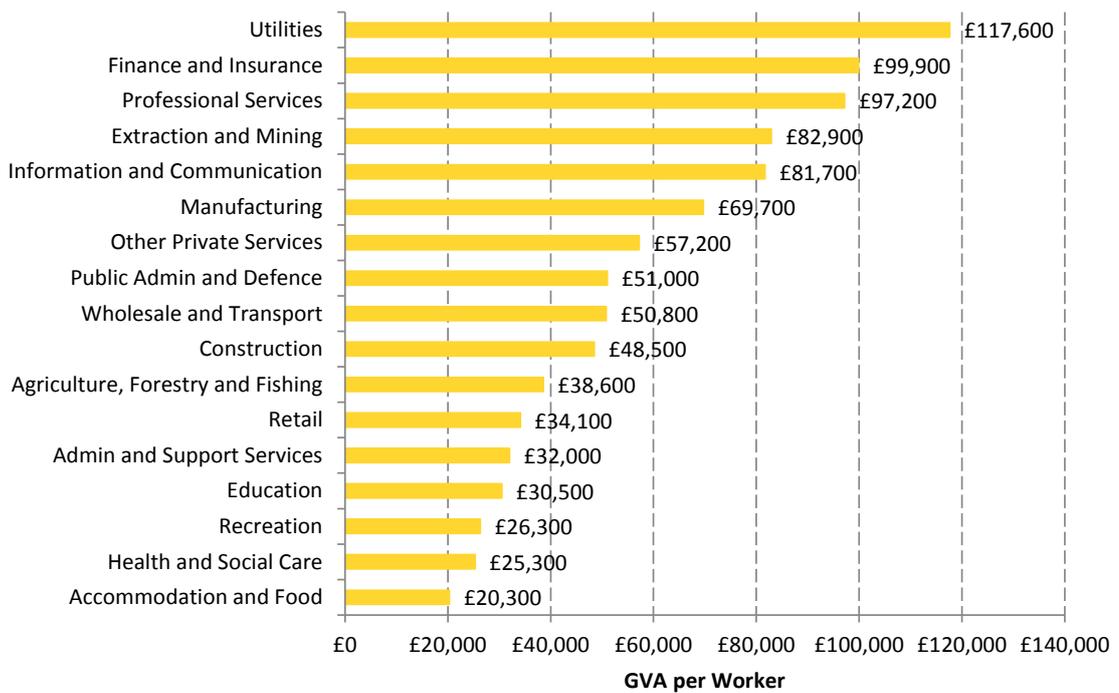


Source: ONS IDBR (2016) / Experian (2017) / Lichfields

Workforce Productivity

2.17 Figure 2.8 shows the value of GVA generated per worker by sector in the South East of England during 2016. Out of the sectors utilities, finance and insurance and professional services were the most productive (£117,600, £99,900 and £97,200 GVA per worker respectively). Using these estimates it is possible to calculate the average productivity of a worker in Manor Royal.

Figure 2.8 South East Workforce Productivity (2016)



Source: Experian (2016) / Lichfields

2.18 Based on the average GVA per workers estimates for the South East and the sectoral composition of Manor Royal, it is estimated each worker in Manor Royal generated on average £54,900 of GVA n 2016. This is £4,500 higher than the South East average in the same year of £50,400 GVA per worker.

Travel-to-Work Area

2.19 Through Census (2011) origin and destination data it is possible to analyse in commuting patterns to Manor Royal⁷. The data is available at a middle super output area (MSOA) geography, which can be selected to cover most of the Manor Royal BID area. The data shows that the largest supplier of labour to Manor Royal is Crawley, with 38.6% of the Manor Royal labour force in 2011 originating from MSOAs in the Borough (see Table 2.3).

⁷ ONS, (2011); Census.

Table 2.3 Manor Royal In-commuting

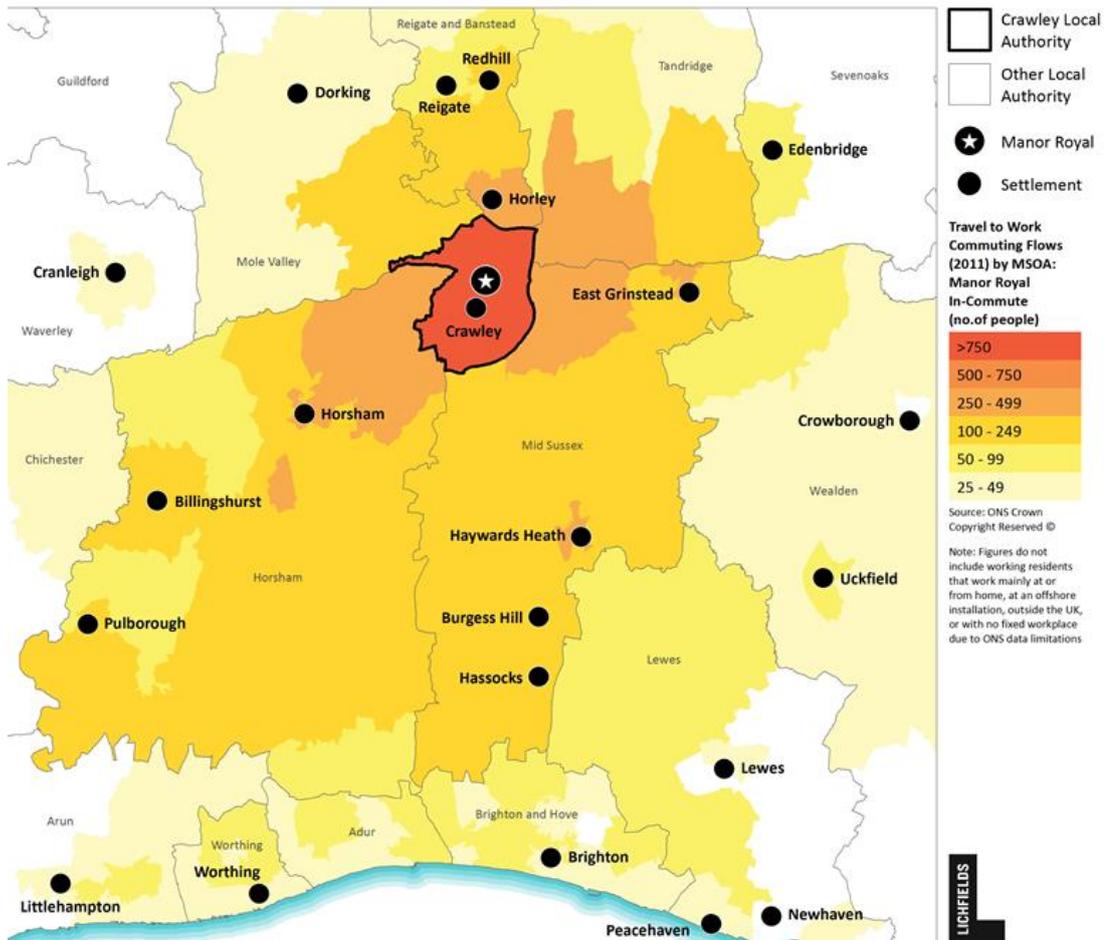
Geography		% Total In-commuters
Crawley		38.6%
Top five in-commuting local authorities excluding Crawley	Mid Sussex	10.0%
	Horsham	8.8%
	Reigate and Banstead	5.7%
	Brighton and Hove	4.9%
	Tandridge	2.0%
Gatwick Diamond		66.7%

Source: ONS (2011) / Lichfields

2.20

The top five other suppliers of labour excluding Crawley were the local authorities of Mid Sussex, Horsham, Reigate and Banstead, Brighton and Hove and Tandridge, contributing 31.4% cumulatively of the business district workforce. The overall Gatwick Diamond including Crawley provided 66.7% of in-commuters, suggesting that the workforce of Manor Royal mainly comes from within the sub-region. This pattern is highlighted in Figure 2.9 that shows the largest concentrations of in-commuters are from within Crawley and the MSOAs near to the Borough boundary. Note that Crawley remains a net importer of labour.

Figure 2.9 Manor Royal MSOA In Commuting



Source: ONS (2011) / Lichfields

Economic Output

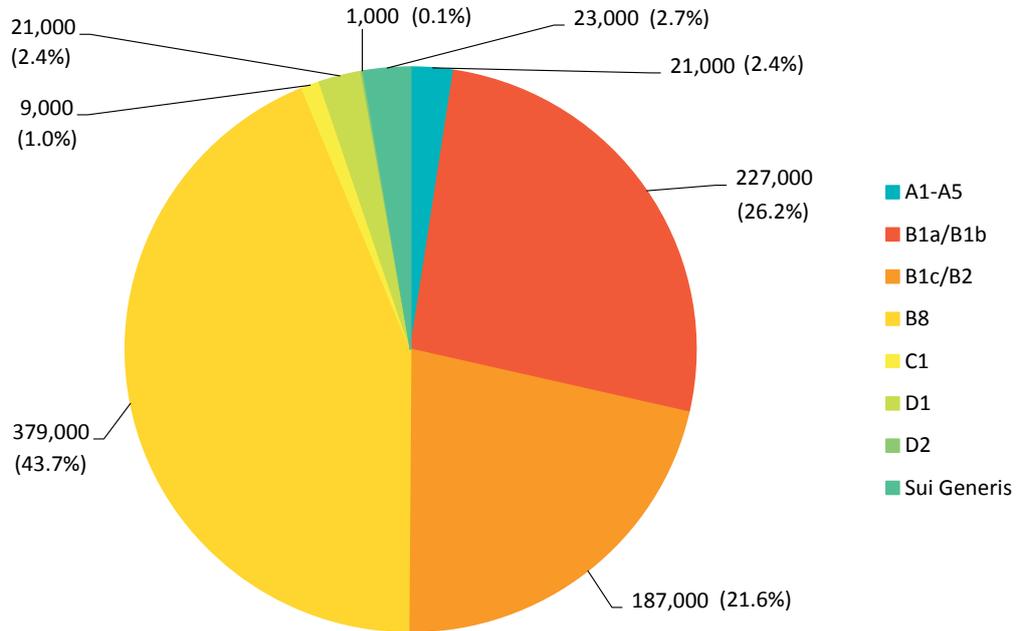
- 2.21 To calculate the economic output of Manor Royal, Experian gross value added (GVA) per worker figures for each sector have been applied to the employment results (see Table 2.2)⁸. The calculation results in Manor Royal generating an estimated £1.23 billion of direct GVA in 2016. Additionally, Manor Royal is estimated to have supported a further £0.54 billion of GVA through its supply chain. The indirect GVA result is based on applying the same set of composite multipliers used to calculate indirect employment. Overall, Manor Royal generated £1.77 billion of GVA through direct and indirect activities in 2016.
- 2.22 The largest contributors to GVA growth were the wholesale and transport and manufacturing sectors, which generated £519.6 million and £484.6 million in 2016 respectively. Other sectors that generated a high amount of GVA included professional services and information and communication (£185.2 million and £161.6 million respectively), which typically produce a higher value of GVA per job.
- 2.23 Out of the Manor Royal zones, Zone 2 is estimated to have generated the highest value of GVA (£780.5 million), equating to 44% of total direct and indirect GVA. Zone 1, Zone 3 and Zone 5 produced similar values (£248.1 million, £274.6 million and £300.8 million respectively), while Zone 4 generated the lowest amount (£168.1 million).

Floorspace

- 2.24 Based upon the BID's evidence base, Manor Royal contained 866,000 sq.m of commercial floor space in 2017. As shown in Figure 2.10, the largest category of floor space is for B8/distribution uses (at 379,000 sq.m). Overall, B use class floor space equates to 91.4% of all commercial floor space in Manor Royal.

⁸ Direct GVA has been calculated by using the Experian estimates for the value of GVA generated by workers in each sector during 2016. These estimates were multiplied by the number of workers in Manor Royal in each sector to get the overall figures for the value of GVA generated by economic activity in Manor Royal. See Appendix 3 for a full breakdown of how much GVA was directly and indirectly generated by each sector in Manor Royal during 2016.

Figure 2.10 Total Floorspace by Use Class (2017) (sq.m)



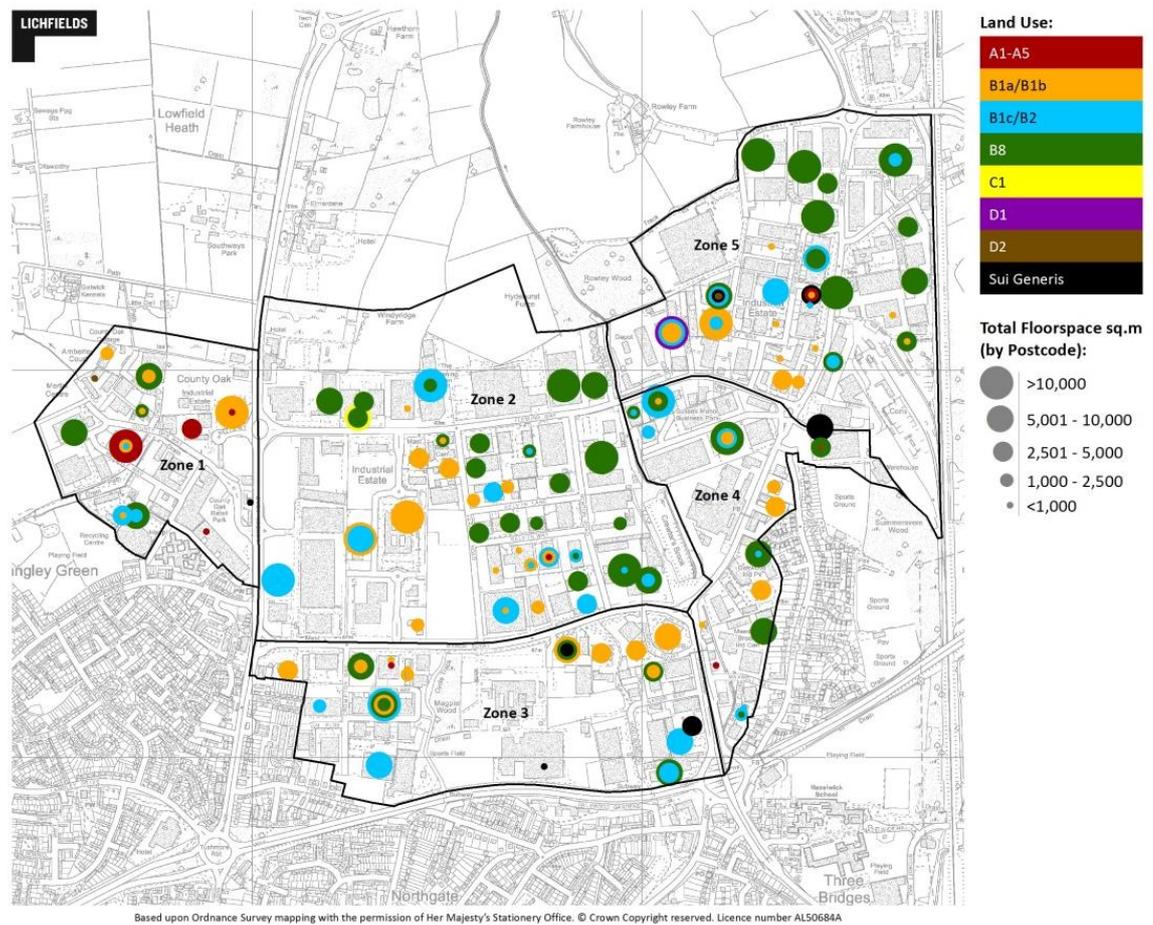
Source: Manor Royal BID (2017) / Lichfields

Note figures may not sum due to rounding

2.25

Figure 2.11 shows where floor space by postcode and sector is located within Manor Royal. There is a high amount of B8 floor space spread out across Manor Royal, with the largest concentrations in the northern part of zone five and eastern part of zone two. B1a/B1b clusters are in the centre of zone two and the north east corner of zone three, while B1c/B2 premises are scattered throughout the business area. There is also a small cluster of A1-A5 floor space in zone one, which will be due to County Oak Retail Park. See Appendix 5 for additional floorspace location mapping.

Figure 2.11 Manor Royal Floorspace Distribution



Source: Manor Royal BID (2017) / Lichfields

Note floorspace mapped at a six-digit postcode level

Fiscal Contribution

Business Rate

2.26 Crawley Borough in 2017 contained 3,115 rateable commercial units, which occupiers or landlords would need to pay business rates on each year. Manor Royal contains 744 rateable commercial units, equivalent to 23.9% of units in Crawley.

2.27 In 2017, Manor Royal is estimated to have generated £34.2 million of business rates revenue for the UK government (see Table 2.4). This figure is calculated by taking each asset that has a rateable value in the BID's records and applying the UK government's 2017/18 business rate multipliers⁹ and using the current small business multiplier threshold¹⁰.

⁹ Source: <https://www.gov.uk/calculate-your-business-rates>, accessed August 2017.

¹⁰ The business rate multipliers used are as follows: standard multiplier 0.479; and small business multiplier 0.466. The small business multiplier cap for 2017/2018 is £51,000. The payable business rate results do not take account of potential business rate relief.

Table 2.4 Manor Royal Payable Business Rates by Land Use (2017)

Asset	Payable Business Rates	% Total Business Rates
A1-A5	£2,880,000	8.4%
B1a/B1b	£7,830,000	22.9%
B1c/B2	£7,710,000	22.6%
B8	£11,040,000	32.3%
C1	£180,000	0.5%
D1	£600,000	1.8%
D2	£50,000	0.1%
Sui Generis	£1,280,000	3.8%
Other	£2,610,000	7.6%
Total	£34,190,000	-

Source: Manor Royal BID (2017) / Lichfields

Note figures may not sum due to rounding

- 2.28 Overall, the B class uses are estimated to generate £26.6 million of payments, equating to 77.8% of the Manor Royal total. Business rates made through assets such as advertising hoardings and car spaces are included in the 'Other' category, which is estimated to generate £2.6m of payments.
- 2.29 Crawley Borough Council expects to collect £116.4m of business rates in 2017, based on a rateable value of £268.8m. The £34.2m of business rate payments estimated to come from Manor Royal would contribute 29.2% of the Crawley Borough total.

Employer and Employee Taxes

- 2.30 To estimate the value of income tax and national insurance paid by workers and employers from Manor Royal, weighted values for income tax and national insurance contributions per worker have been calculated using the Annual Survey of Hours and Earnings (ASHE)¹¹ and tax bands for the 2017 to 2018 tax year. The weighted values used are based on average figures for the South East and are sector specific.
- 2.31 Overall, Manor Royal is estimated to generate £67m of income tax, £49m of employee national insurance contributions and £56m of employer national insurance contributions, totalling £173m of wage-based tax. See Appendix 3 for a more detailed breakdown of tax generated by Manor Royal in each sector.

Recent Performance

Employment

- 2.32 Through analysis of the ONS IDBR data, it is possible to see how the nature of employment in Manor Royal has changed over time. Table 2.5 shows that employment in Manor Royal decreased by 1,100 jobs between 2010 and 2016, equivalent to a -4.8% contraction. The primary cause of the reduction in employment is due to a large administration and support services business moving from Manor Royal to elsewhere in Crawley. If the firm had not moved, then Manor Royal would have seen an increase in total employment over the period.

¹¹ ONS, (2016); Annual Survey of Hours and Earnings Workers – 2015.

Table 2.5 Manor Royal Change in Direct Employment by Sector (2010-2016)

Sector	Number of Jobs		Change	
	2010	2016	Absolute	%
Accommodation and Food	1,100	900	-200	-16.2%
Admin and Support Services	5,600	3,500	-2,100	-37.9%
Agriculture, Forestry and Fishing	-	-	-	-
Construction	800	500	-200	-32.7%
Education	600	700	-	6.6%
Extraction and Mining	-	-	-	-
Finance and Insurance	400	400	-100	-11.7%
Health and Social Care	100	100	-	-21.5%
Information and Communication	1,000	1,400	400	39.8%
Manufacturing	5,300	4,800	-500	-8.7%
Other Private Services	100	-	-100	-70.6%
Professional Services	1,100	1,300	300	24.9%
Public Admin and Defence	-	100	-	70.3%
Recreation	100	100	-	66.2%
Retail	800	1,300	500	69.5%
Utilities	200	200	-	30.3%
Wholesale and Transport	6,400	7,100	700	10.7%
Total	23,600	22,400	-1,100	-4.8%

Source: ONS IDBR (2016) / Lichfields

Note figures may not sum due to rounding

2.34

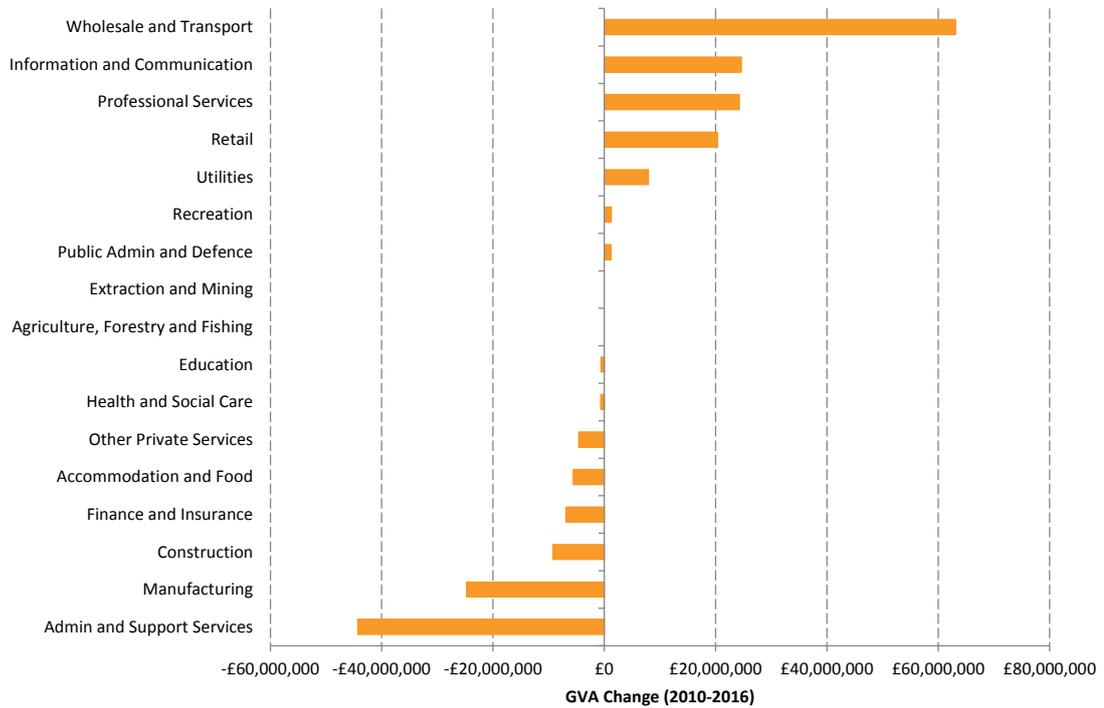
Sectors in Manor Royal that grew significantly between 2010 and 2016 included wholesale and transport; retail; information and communication and professional services (700, 500, 400 and 300 additional jobs respectively). The sectors that dragged the most on employment growth excluding administration and support services included manufacturing; accommodation and food and construction (-500, -200 and -200 jobs respectively).

Economic Output

2.35

Between 2010 and 2016 the total value of direct GVA generated by Manor Royal increased by £46m in real terms (see Figure 2.12). The expansion was driven by increases in GVA generated by workers in different sectors, which mitigate the decrease in employment that occurred over the same period and would be significantly higher if the administration and support services employer had not moved from Manor Royal to another location within Crawley.

Figure 2.12 Manor Royal Direct GVA Change by Sector (2010-2016)



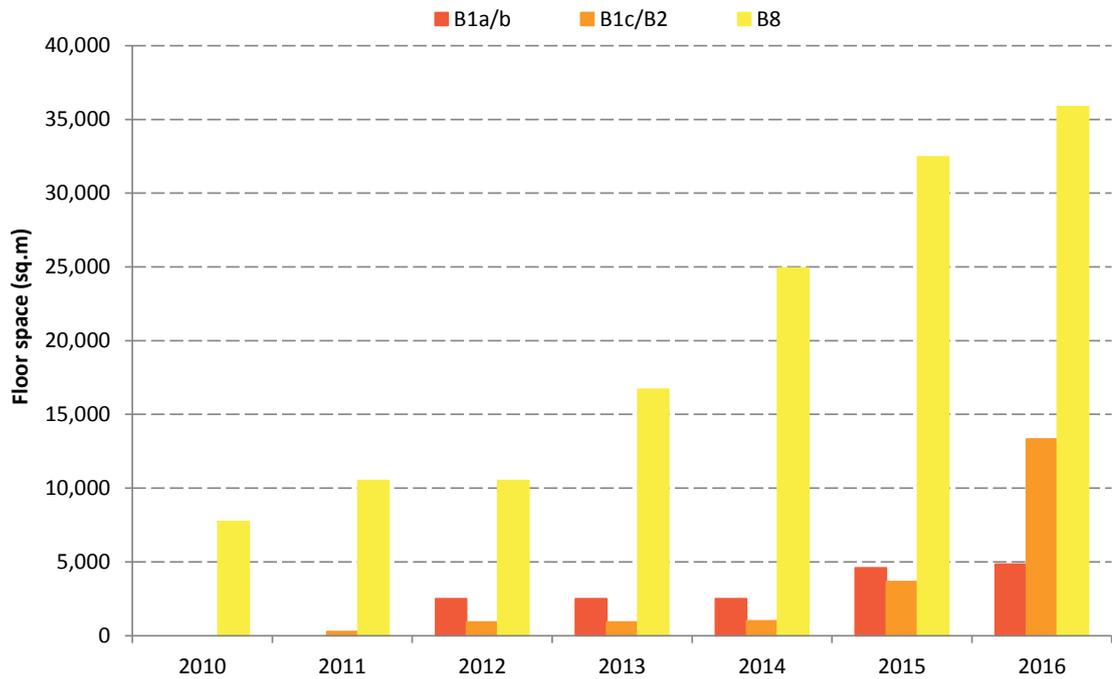
Source: Experian (2017) / Lichfields

2.36 The sectors driving GVA growth included wholesale and transport; information and communication; professional services and retail (£63.1m, £24.6m, £24.2m and £20.3m additional GVA respectively). These sectors also saw the largest increases in employment over the period. Similarly, the sectors that saw the largest decreases in employment (administration and support services, manufacturing and construction) also experienced the highest reductions in GVA (see Appendix 3 for further details).

Development Activity

2.37 Using monitoring data from West Sussex County Council, it is possible to analyse how the stock of B class floorspace has changed recently in Manor Royal. Figure 2.13 shows between 2010 and 2016 the stock of B1a/b, B1c/B2 and B8 floorspace increased (4,900sq.m, 13,300sq.m and 35,900sq.m respectively). There was no net loss of floor space in any of the B use groupings, though some gross losses did occur in some years.

Figure 2.13 Manor Royal Net Completions



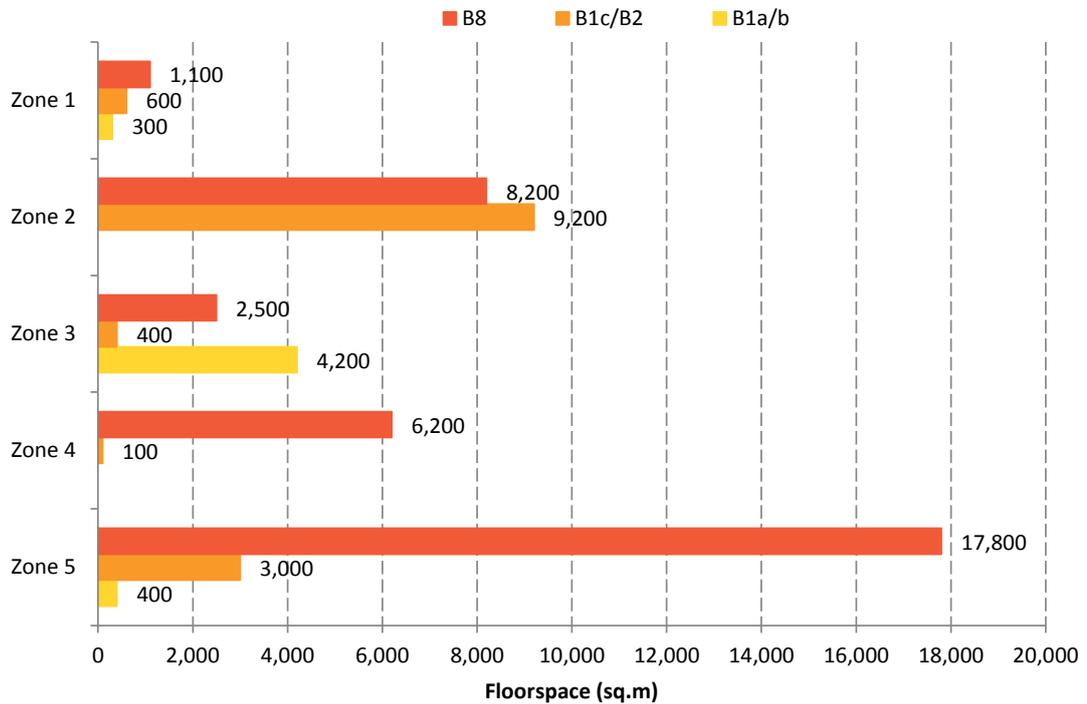
Source: West Sussex County Council (2017) / Lichfields

2.38

Figure 2.14 shows net completions by B use grouping in each zone of Manor Royal¹². The highest areas of additional floor space were constructed in zone two and zone five (17,400sq.m and 21,200 sq.m respectively). A significant proportion of the floor space completed in both zones was B8. The majority of B1a/b floor space was constructed in zone three (4,200sq.m), with a small area also being delivered in zone one and zone five (300 sq.m and 400 sq.m respectively). There was also the significant delivery of new B1c/B2 floor space in zones two and five over the period.

¹² Note West Sussex County Council’s monitoring data is updated frequently and is generally reliable. However, data entry inconsistencies can occur, which can skew the data away slightly from what is actually happening on the ground.

Figure 2.14 Manor Royal Zone Net Completions (2010-2016)



Source: West Sussex County Council (2017) / Lichfields

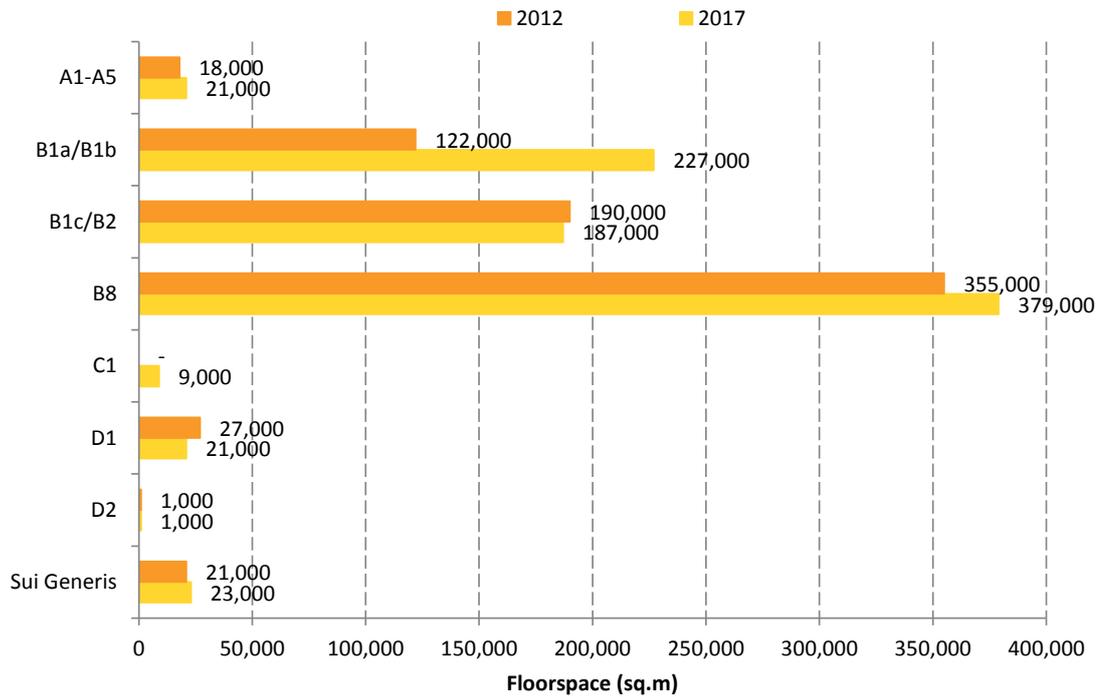
Note figures may not sum due to rounding

2.39 Despite the net increases in all B class floorspace types in Manor Royal, Crawley overall has seen a decrease in office and industrial floorspace over the same time period. Based on Valuation Office Agency (VOA) Business Floorspace statistics, between 2010 and 2016 Crawley lost - 24,000sq.m of office floorspace and -60,000 of industrial floorspace, contrasting with the net gains in Manor Royal over the same time period¹³.

2.40 The BID’s data also indicates that the area of commercial floorspace in Manor Royal has grown. Between 2012 and 2017 the total stock of commercial floorspace has increased from 735,000sq.m to 866,000sq.m, equivalent to a proportional expansion of 17.9%. Data from both West Sussex County Council and BID suggests that the stock of B1a/b and B8 floorspace has increased in Manor Royal. However, the BID’s data differs to the County Council as new B1a/b floorspace is shown to be the main driver of additional stock of commercial floorspace at Manor Royal (see Figure 2.15), suggesting that a large quantum of B1a/b floorspace came online after the Council’s monitoring data timeline stops in 2016.

¹³ Valuation Office Agency (VOA), (2016); Business Floorspace.

Figure 2.15 Total Floorspace by Use Type (2012 and 2017)



Source: Source: Manor Royal BID (2017)/ Lichfields

Note figures may not sum due to rounding

Fiscal Contribution

2.41

Table 2.6 shows the change in the value of the payable business rates for Manor Royal in 2012 and 2017. The values for 2012 have been calculated using the same method as for 2017, though the applicable multipliers and small business multiplier threshold have been changed to the ones used in 2012¹⁴. Overall, total payable business rates have increased from £28.1 million to £34.2 million over the period.

¹⁴ The multiplier used for 2012 are as follows: standard multiplier 0.458; and small business multiplier (0.450). The small business threshold for the year was £18,000. Note the results do not take account of potential business rate relief.

Table 2.6 Manor Royal Payable Business Rates (2012-2017)

Asset	Payable Business Rates (£)		Change	
	2012	2017	Absolute	%
A1-A5	£2,210,000	£2,880,000	£670,000	30.3%
B1a/B1b	£8,180,000	£7,830,000	-£340,000	-4.2%
B1c/B2	£5,900,000	£7,710,000	£1,810,000	30.6%
B8	£9,700,000	£11,040,000	£1,340,000	13.8%
C1	£330,000	£180,000	-£150,000	-45.3%
D1	£800,000	£600,000	-£200,000	-25.1%
D2	£40,000	£50,000	£10,000	27.0%
Sui Generis	£910,000	£1,280,000	£370,000	41.2%
Other	£40,000	£2,610,000	£2,570,000	Over 100%
Total	£28,110,000	£34,190,000	£6,080,000	21.6%

Source: Source: Manor Royal BID (2017)/ Lichfields

Note figures may not sum due to rounding

2.42 The primary drivers of payable business rate growth from 2012 to 2017 were B1a/b, B1c/B2 and B8 assets. Also, business rate payments from other assets not included in the land use categorisations increased dramatically. The rapid growth in other payments was caused by changes to the assets contained in the BID's evidence base, and how different entries were categorised while analysing the data.

Summary

2.43 Manor Royal makes a significant contribution to the economy of Crawley and the Gatwick Diamond, employing a high number of people, supporting supply chain jobs and contributing to the public purse. The economic footprint of the business district is summarised in the following points.

- 1 There are currently 612 businesses active within the BID boundary with significant numbers in the wholesale and transport and manufacturing sectors;
- 2 22,400 are directly employed in Manor Royal with an estimated 10,400 jobs supported in the supply chain;
- 3 Manor Royal generates £1.23bn of direct GVA and is estimated to generate an additional £0.54bn indirectly through supply chain activities;
- 4 Manor Royal contains 866,000sq.m of commercial floorspace, of which 91.4% is B class;
- 5 The business district is estimated to have generated £34.1m of business rates for the public purse in 2016, some of which will be retained in Crawley Borough; and
- 6 Employees and employers are estimated to generate £163m of tax for the public purse through income tax and national insurance contributions.

2.44 In terms of recent performance, Manor Royal has experienced a decrease in overall employment due to one large-scale employer moving from Manor Royal to another location within Crawley. However, GVA has grown through improved productivity per worker, business rates payments have increased by £6m and new commercial development has contributed a significant area of net additional B use floorspace to Crawley's stock (+54,100sq.m), which based on the VOA data has decreased between 2010 and 2016. Three major take away points are outlined below.

- Manor Royal takes up 218ha of land, contains 866,000sq.m of commercial floorspace and supports 620 businesses.
- The business district supports 32,800 direct and indirect jobs, generating £1.77bn of GVA per annum. £34.2m of business rates payments and £163m of employee and employer taxes are generated each year for the public purse.
- As a whole, Manor Royal has performed well over recent years and continues to represent a dominant business cluster within the Gatwick Diamond and wider South East, and the largest critical mass of businesses in Crawley. Despite declining land availability, a significant stock of new commercial space has been delivered over recent years, underlining Manor Royal's economic vibrancy and attractiveness to a diverse mix of business occupiers and activity.

3.0 Policy and Evidence Review

3.1 This section provides a review of the key planning and economic policies that guide the functioning and growth of the Manor Royal Business District, and also selected technical evidence base studies that have been prepared to inform policy, business planning and improvement works within the BID.

Local Planning Policy

Crawley Local Plan (2015)

3.2 Crawley Borough Council adopted the Local Plan in December 2015¹⁵. The Plan covers the period between 2015 and 2030, setting out the Council's long-term spatial vision for the Borough. It replaces the previous Core Strategy (2008)¹⁶ and saved policies from the previous Local Plan (2000)¹⁷. The following policies from the Plan apply specifically to Manor Royal and were shaped by joint working between the Council and business community:

- Policy EC1: 'Sustainable Economic Growth' points that Crawley is a key economic driver in the Gatwick Diamond and the Council will explore opportunities to allow for new and existing businesses to thrive. The policy recognises Crawley's constrained employment land supply position, and recognises the need for a strategic employment location, in order of preference within, at or close to Crawley. Any new strategic employment locations in the Borough should complement the established role of Manor Royal as the Borough's major economic area.
- Policy EC2: 'Economic Growth in Main Employment Areas' directs new employment proposals to the designated main employment areas, and seeks to resist the loss of employment floorspace unless specific policy criteria are met. Proposals that involve a net loss of employment floorspace in the Borough's main employment areas (including Manor Royal), will only be permitted under certain circumstances including if a site is no longer viable; and a development would not have an adverse impact on the functioning of an employment area or the wider economic functioning of Crawley.
- Policy EC3: 'Manor Royal' outlines that Manor Royal is the principal business location in the Borough and is particularly significant in the Gatwick Diamond economic area. The policy places clear focus on the delivery of B-Class business uses in Manor Royal, though allows for flexibility for non B Class development provided that this is a scale and function that enhances, and does not undermine, the role and businesses function of Manor Royal. Development will be allowed if it is in a B use class and would result in re-use, intensification or change of use. All development is expected to contribute to the environment of Manor Royal through following the principles of the Manor Royal Design Guide Supplementary Planning Document (2013).

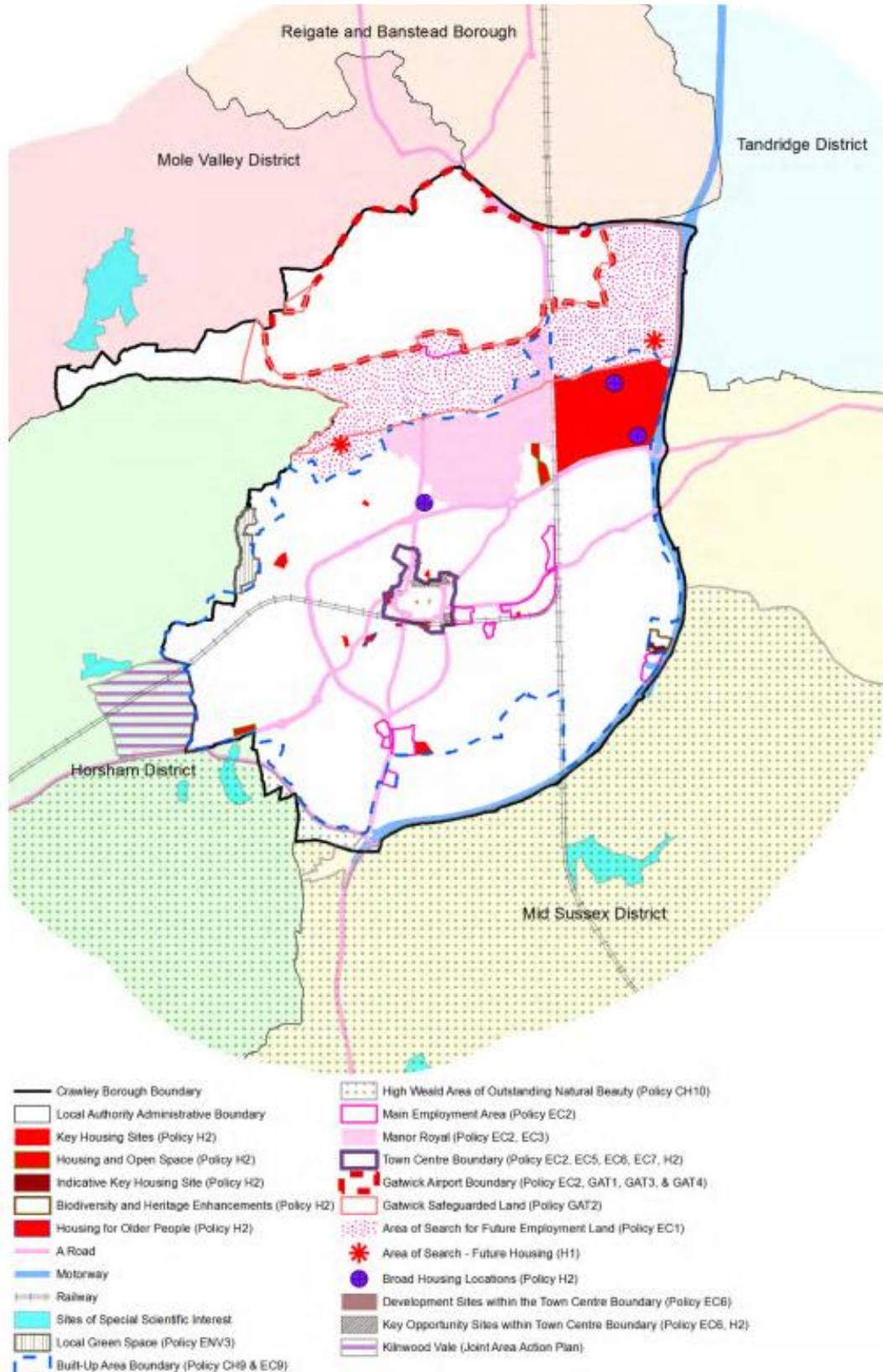
3.3 Figure 3.1 below shows the Manor Royal Local Plan boundary, note the boundary extends north to cover the City Place office area, which is not included within the area the BID operates.

¹⁵ Crawley Borough Council, (2015); Crawley Borough Local Plan 2015-2030.

¹⁶ Crawley Borough Council, (2008); Core Strategy.

¹⁷ Crawley Borough Council, (2000); Saved Local Plan Policies.

Figure 3.1 Crawley Local Plan Manor Royal Policy Area



Source: Crawley Borough Council (2015)

North West Sussex Economic Growth Assessment (2014)

- 3.4 The North West Sussex Economic Growth Assessment was published in 2014 by Crawley Borough Council, Horsham District Council and Mid Sussex District Council¹⁸. The assessment identified Manor Royal as the most significant employment area in the Gatwick Diamond. Enquiries for floorspace in Manor Royal included a number from outside of the sub-region, while enquiries for other local employment clusters tended to be from within the sub-region.
- 3.5 The assessment found that Crawley had a deficit in the area of land that may be required to meet its future employment needs. Under the baseline job growth scenario the Borough is estimated to have a deficit of -34.9ha of employment land (-30.6ha industrial and -4.3ha office respectively).
- 3.6 To help meet the gap in available employment land, the assessment recommends the Council consider selective extensions to Manor Royal taking into account land constraints caused by safeguarded airport land. It also recommends defining a core business area in Manor Royal where only B-use classes are permitted; exploring options to de-risk planning such as local development orders (LDOs) and planning for facilities to support the wider employment functions (i.e. a service hub).

Crawley Economic Growth Assessment Update (2015)

- 3.7 To inform Local Plan examination hearings, Crawley published an Economic Growth Assessment Update in 2015 that revises the employment land requirements calculated for the Borough in the 2014 North West Sussex Economic Growth Assessment¹⁹. The assessment update took account of the recently published census and employment data and includes a higher number of scenarios for calculating the Borough's employment land requirement, resulting in a shortfall of between 2.9ha and 29.2ha of employment land over the Local Plan period (2015-2030), assuming that sites subject to safeguarding are removed from pipeline supply.
- 3.8 It should be noted that the employment land supply position at Manor Royal has subsequently declined in scale since the EGA Update was undertaken in 2015, placing increasing pressure on a shrinking supply of land to accommodate new development. CBC is currently working on an updated employment land supply trajectory which will provide an up-to-date position to help guide planning policy over the coming months and years.

Article 4 Direction for Office (B1a) to Residential (C3) (2015)

- 3.9 Crawley Borough Council adopted two Article 4 Directions (2015) for an area covering Manor Royal and City Place office park²⁰. The directions came into effect on 26th July 2016 and remove the ability of landowners to use permitted development rights to change buildings from B1a or B8 to C3 use. Landowners instead are required to go through the regular planning process, nullifying this form of permitted development right.
- 3.10 In addition, the Council adopted an additional Article 4 Direction in October 2017 that blocks change of use from light industrial (B1c) to residential (C3) in Manor Royal, by use of permitted development rights.

¹⁸ Crawley Borough Council, Horsham District Council and Mid Sussex District Council, (2014); North West Sussex Economic Growth Assessment.

¹⁹ Crawley Borough Council, (2015); Crawley Economic Growth Assessment Update.

²⁰ http://www.crawley.gov.uk/pw/Business/Manor_Royal_Business_District/PUB261224, accessed September 2017.

Manor Royal

Manor Royal Masterplan (2010)

- 3.11 The Manor Royal Masterplan was published in 2010 by Crawley Borough Council, before the creation of the BID. The Masterplan was commissioned by the Council to provide strategic direction for the future growth and development of Manor Royal; it forms part of the documents behind the Manor Royal Supplementary Planning Document (SPD). What the Masterplan does is summarised in the following bullet points:
- *“Sets out the long-term vision and strategy for Manor Royal;*
 - *Identifies the objectives required to achieve the vision;*
 - *Proposes the strategic land use and business activity mix;*
 - *Provides a set of realistic interventions to catalyse change; and*
 - *Acts as a marketing tool to articulate the future vision and direction of Manor Royal.”*
- 3.12 The Masterplan includes a delivery strategy that recommends key points to allow for the delivery of the Masterplan aims:
- Developing and adopting robust planning guidance for Manor Royal;
 - Creating a coordinated design and public realm framework for the main sites and character zones;
 - Improving facilities to support small businesses and helping to support the internal supply chain;
 - Developing a set of sustainability criteria for new development and contributing to support existing occupiers to increase long-term sustainability;
 - Creating a set of transport priorities that cover the whole of Manor Royal; and
 - Supporting greater amenity uses such as improving access to open space.
- 3.13 To deliver key factors included in the delivery strategy part of the Masterplan, different options are considered such as adopting a simplified planning zone (SPZ) like at Slough Trading Estate; carrying out a feasibility testing for a new Manor Royal hub; improving strategic road signage through collaboration with the Highways Agency; and continuing to support businesses through a support framework.

Manor Royal Design Guide SPD (2013)

- 3.14 The Design Guide SPD provides design principles for the Manor Royal BID area and City Place office park²¹. The Guide acts upon the measures discussed in the Manor Royal Master Plan, delivering a coordinated set of design guidelines to enhance the future environment of the business district. Design guidance is provided for different aspects of the business district including buildings, landscape and open space, highways signage and lighting.
- 3.15 Section four of the Guide contains higher detail guidance for specific parts of Manor Royal. This includes guiding design in two separate character zones - a core business area, and a northern industrial zone. The former covers the heart of Manor Royal including Manor Royal Boulevard and Crawley Business Quarter office area. The latter includes smaller industrial clusters and distribution warehouses such as a large Royal Mail depot. Guidance is also provided for gateway

²¹ Crawley Borough Council, (2013); Manor Royal Design Guide – Supplementary Planning Document.

and major development sites of the time such as ‘Thales Gatwick Road, which has subsequently been redeveloped into high-quality offices.

Public Realm Strategy (2013)

- 3.16 The Manor Royal Public Realm Strategy was published in 2013 by Crawley Council²². The Strategy is not a formal planning document and instead acts as a companion to the Design Guide SPD. It provides different approaches that landowners and developers can follow to help match the guidance found in the SPD. The six objectives of the Strategy focus on strengthening the identity of Manor Royal, supporting the economic function of the business district and improving the general environment for occupiers.
- 3.17 For each of the Strategy objectives, detailed proposals are provided for specific parts of Manor Royal. The solutions include advice on the types of planting and palette of materials for roundabouts, a hierarchy of the main highways and proposing public realm improvements at Crawters Brook Park. To fund the improvements the strategy suggests gaining opportunities from developers, contributions from the Manor Royal Business Group and s106 contributions, as identified in the 2010 Master Plan.

Manor Royal Transport Strategy (2017)

- 3.18 The BID published the Manor Royal Transport Strategy in January 2017²³. The Strategy provides an action plan to counter the perceived transport challenges Manor Royal currently faces. Problems are particularly focused on traffic congestion and provision of parking. The Strategy found that there was a lack of awareness of other options for getting to work beyond a private car and that people perceived travelling by car to be faster and more cost-efficient than public transport.
- 3.19 A costed action plan is provided at the end of the Strategy report. The activities include low-cost interventions such as guaranteeing a ride home for car sharers and providing a cycle maintenance sessions several times a year. The higher cost interventions concentrate on hard infrastructure changes such as the provision of a bus lane between London Road and the Gatwick Road and junction improvements at the Manor Royal/ Gatwick Road junction to reduce congestion.
- 3.20 The Strategy followed an in-depth Transport Study undertaken in 2016 by Steer Davies Gleave which reviewed the current transport situation within the Business District, highlighted the key issues felt by those working within the MRBD and recommended the most worthwhile measures to be pursued within the next stage of the project (i.e. the Action Plan). The study identifies four recurring key issues highlighted by stakeholders and these are summarised below:
- 1 the lack of car parking available across the site;
 - 2 the congestion on the local highway network at peak times for both cars and buses;
 - 3 bus services are not perceived to be attractive enough in terms of route coverage and frequency outside peak periods, particularly with regards to links to three Bridges; and
 - 4 information about alternative options is insufficient at present to encourage mode shift.

²² Crawley Borough Council, (2013); Manor Royal

²³ Manor Royal BID, (2017); Manor Royal Transport Strategy.

Grey Infrastructure Audit (2016)

3.21 The BID commissioned a ‘grey audit’ in 2016 to survey, summarise and make recommendations on public highways in the business district²⁴. The Report recommends urgent high priority works for improving public highways were repairing potholes on carriageways and foot/cycle ways, repairs to verges at crossings and improving defective curbs. In the short to medium-term the report provides recommendations for £1.06m of carriageway works and £1.25m of footway improvements.

Green Infrastructure Audit (2016)

3.22 The Green Audit (2016) examines the physical environment issues in Manor Royal and provides practical costed solutions for the BID to consider enacting in the future²⁵. Short-term measures in the Audit to improve the environment of Manor Royal include cutting back encroaching grass, removing unaesthetically pleasing vegetation and embedded vegetation from footpaths, costing from £10,000-£16,500 in total. In the longer-term the Audit recommends allocating capital for specific improvement works at locations in Manor Royal such as on Newton Road.

Occupier Survey (2016)

3.23
3.24 The most recent occupier survey²⁶ (survey of levy payers) was undertaken between March and June 2016 and identified a range of issues and areas for improvement from an occupier perspective that the BID will need to focus on and address where possible. Some of the feedback has implications for this EIS in terms of views and suggestions for making Manor Royal a more attractive place to do business in future. These are summarised below:

- There is considered to be scope for more information about and involvement with the work of the BID;
- Improving the appearance of Manor Royal business district (i.e. public realm) is considered to be a very important BID activity amongst levy payers;
- The most important role that the BID provides is considered to be a representative voice on issues impacting on the business district (i.e. playing an external facing role);
- A range of existing BID initiatives are considered to give Manor Royal a range of USPs compared with other locations, such as Manor Royal Business Watch and procurement hub;
- There is interest amongst levy payers for the BID to engage in more marketing activity;
- Generally high levels of satisfaction overall with Manor Royal as a business location; and
- Levy payers are keen for a number of tangible improvements to be made to enhance the overall quality and attractiveness of Manor Royal as a business location, mainly relating to roads, parking, footpaths etc.

Community Street Audit (2017)

3.25
3.26 A Community Street Audit Report was prepared in early 2017 by charity Living Streets to investigate accessibility and the appeal of Manor Royal for walking. The audit identified and recorded issues that encourage or discourage everyday walking, following which a series of short and longer term priorities were agreed to improve the walking environment.

3.27 The study identified a number of improvements to increase walking rates in Manor Royal, some of which are being implemented by the BID. The audit demonstrates that there is significant

²⁴ Manor Royal BID, (2016); Manor Royal Business District Condition Survey Report.

²⁵ Manor Royal BID, (2016); Manor Royal Green Audit Recommendations Report.

²⁶ Manor Royal BID Mid Term Survey 2016: THE LEVY PAYERS – FINDINGS

scope to enhance the appeal and take-up of walking amongst Manor Royal's employees, as part of enhancing the wider appeal of the Business District to business occupiers and their staff.

BID Business Plan

Manor Royal BID Business Plan (2013)

3.28 The BID Business Plan was published in proposal²⁷ and prospectus²⁸ form in 2013, covering the period from 2013 to 2018. The proposal Business Plan outlines that the need for a BID in Manor Royal is based upon the offer of the business area remaining stagnant between the publication of the Master Plan and 2013. Other business parks such as Winnersh Triangle and Crossways in Dartford continued to improve their offer over the time period, and it was considered that the introduction of a Manor Royal BID would provide a catalyst to bring forward many of the master plan recommendations.

3.29 The area covered by the BID includes all of the Local Plan designated Manor Royal site except the City Place office quarter. The vision for improving Manor Royal through the BID is based on three strategic objectives:

- 1 Create opportunities to increase trade and reduce cost.
- 2 Raise the profile and reputation of Manor Royal.
- 3 Improve the infrastructure of Manor Royal.

3.30 To enable objective one, activities outlined in the Business Plan for the BID include creating events to help promote businesses and to develop PR and digital media channels to improve promotion of Manor Royal. In addition, the BID will encourage collaboration and joint working among Manor Royal occupants to help develop new products and services.

3.31 For objective two, the BID will partner with organisations and businesses to create a combined approach for the use of properties and sites. The BID will also develop specific campaigns and promotions to enable businesses to raise their profile and benefit from the improving Manor Royal brand.

3.32 For objective three, the BID will carry out and enable a number of infrastructure improvements. Choice examples include improving signage and parking for visitors and employees, broadband and IT infrastructure, and identifying and delivering short and long-term solutions for lowering congestion on the roads of Manor Royal.

Emerging Business Plan (Ongoing)

3.34 As the current Business Plan period finishes in 2018, the BID is currently preparing a new one that will cover the following five years (2018-2023). The emerging vision for the Business District area as set out in the new Business Plan is:

“For Manor Royal to be widely regarded as the place where the best companies and people choose to be for the strength of its business community and the quality of its trading and working environment.”

3.35 This vision captures a future for Manor Royal that works for businesses and staff where there is a shared commitment to collaborate to deliver that vision where the BID provides the momentum, energy and drive. Based on this vision, the emerging Business Plan states that the central purpose of the BID is to:

²⁷ Manor Royal BID, (2013); Business Improvement District Business Plan Proposal.

²⁸ Manor Royal BID, (2013); Business Improvement District Business Plan Prospectus.

“Improve the trading and working environment of Manor Royal.”

Summary

- 3.36 Current local planning policy suggests there is support for the continued development and improvement of Manor Royal. The business area is protected under the new Local Plan and Article 4 Directions has been put in place to avoid the encroachment of residential uses through the use of permitted development rights to convert offices and warehousing. The Local Plan also promotes new B class development at Manor Royal. Policy EC3 supports the re-use and intensification of current B class sites and the changing of use from another to B class.
- 3.37 The 2010 Master Plan signalled the start of the agenda that has run locally up until today of improving Manor Royal. The Master Plan identified that the business area fell behind other competing business parks, and therefore required some improvements. The Design Guide SPD and Public Realm Strategy are reactions to the need to improve Manor Royal, acting as guides to improve the environment and feel of the business area through interventions and when new development occurs. The final step to help improve Manor Royal was through the creation of the BID in 2013, which acts as a catalyst for interventions in the environment, providing support to businesses and enhancing the Manor Royal brand.
- 3.38 Whilst the existing planning environment is generally supportive of continued economic growth and development at Manor Royal, there remains scope for improvements and enhancements to be made to speed up and simplify the day-to-day planning arrangements and requirements faced by businesses seeking to expand, upgrade or move into Manor Royal. This is discussed in more detail in Chapters 7.0 and 8.0.

4.0 Property Market Signals

4.1 This section provides an overview of the commercial property market in Manor Royal and across the wider Gatwick Diamond. The analysis draws upon a range of property market data as well as consultations with a number of commercial property agents as noted in Appendix 1.

Market Geography

4.2 The economic geography of the Gatwick Diamond is framed by two key property market areas, namely the London to Brighton and A23/M23 corridors, as illustrated in Figure 4.1. At present, the commercial property market in the Gatwick Diamond is relatively self-contained, with the majority of enquiries originating from within the sub-region itself although there are exceptions.

4.3 Occupier requirements generally follow the key north-south corridors of the A23/M23 and London to Brighton mainline. Conversely, east to west business migration across the Gatwick Diamond is limited and the sub-region less actively competes with the wider M25, M3, A3 or M4 corridors for occupiers and investors.

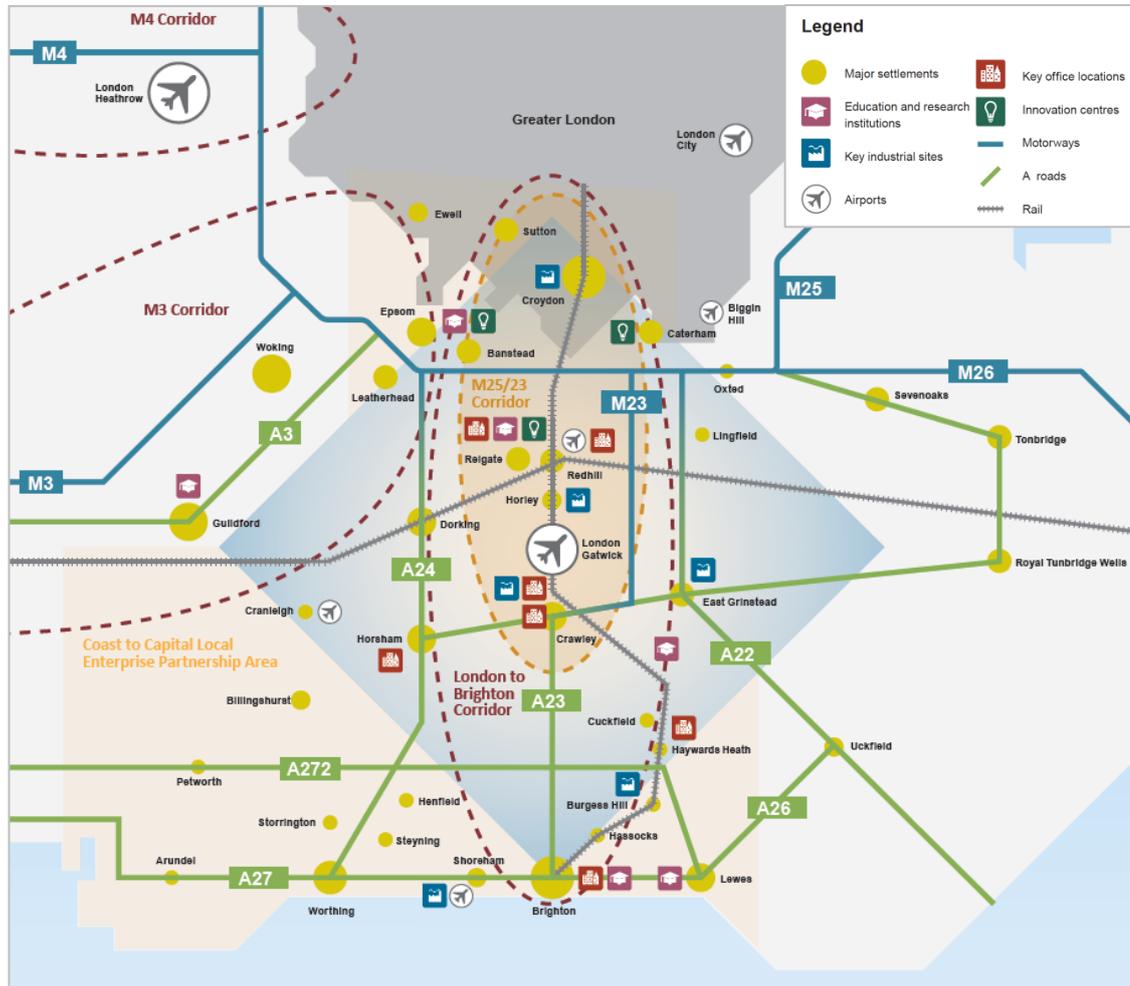
4.4 Crawley represents the largest and most significant commercial centre within the sub-region. Its locational strengths, including proximity to an international airport at Gatwick, the M23/M25 and fast rail links to London and the South Coast combine to make Crawley an attractive business location to a wide range of occupiers and uses. Its combined employment land and connectivity offer means that Crawley tends to compete less directly with other smaller centres in West Sussex and instead is positioned alongside larger centres in the South East such as Croydon, Basingstoke and Guildford.

4.5 In this context, Manor Royal is the primary business location in Crawley and, as noted previously, it represents the largest employment site within the Gatwick Diamond area. The site was initially designated in the New Town Masterplan for industrial (manufacturing and distribution) uses but following the removal of policy restrictions during the 1980's has developed into a more mixed-use business location through the gradual redevelopment of industrial sites for office use. In recent years, the gradual replacement of industrial losses with higher value office uses and some non B-class uses (e.g. retail warehousing, car showrooms, hotels) has led to 'patchwork' development within Crawley's key employment site.

4.6 The Gatwick Diamond has a relatively buoyant commercial property market, driven by its central location within the wider South East, excellent transport links and connectivity, quality of life factors and skilled workforce. Whilst demand for commercial space in the Gatwick Diamond weakened during the recession, it has recovered recently, in particular from an industrial market perspective (described in more detail below). In contrast, demand for office space has lagged behind, partly due to occupier uncertainty alongside more general changes in working practices which influence demand for premises.

4.7 There is also reported to be rising demand from firms exploring the concept of 'strategic dispersal' whereby occupiers paying high rents for office space in central London locations are looking to move their back office staff outside of the Capital.

Figure 4.1 Gatwick Diamond Property Market Geography



Source: Lichfields

Market Segments

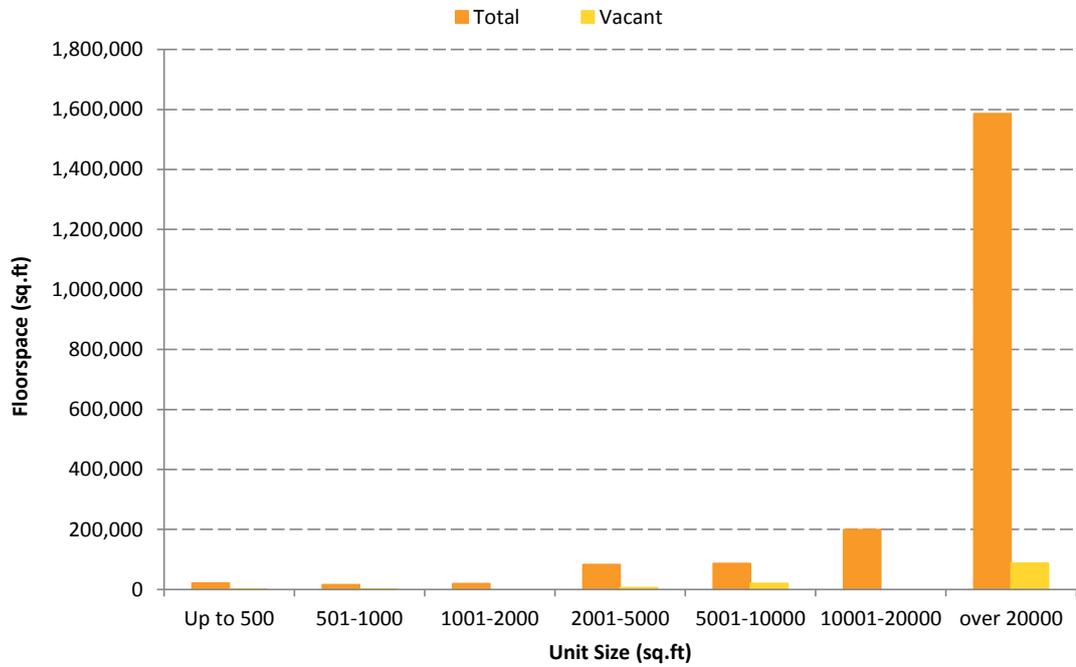
Industrial

- 4.8 Manor Royal has historically provided a popular location for industrial occupiers and now represents the main driver of market demand from a commercial property perspective. The B8 (warehousing and logistics) sector is reported by local property agents as being particularly buoyant, due in part to Manor Royal’s proximity to strategic road and motorway networks (M23/M25) as well as the wider growth trend in online sales and associated distribution networks. More traditional industrial uses, such as those accommodating manufacturing and workshop style space, also account for occupier demand, albeit to a lower extent than B8 uses.
- 4.9 The majority of demand for industrial space in Manor Royal tends to be indigenous ‘local churn’, from existing occupiers looking to expand or relocate. The Business District does attract occupiers from elsewhere across the Gatwick Diamond sub-region and further afield, although such examples are relatively rare in the current market. Property market agents identified a growing ‘ripple effect’ from South London as industrial occupiers continue to be displaced by mixed-use development within the M25.

4.10

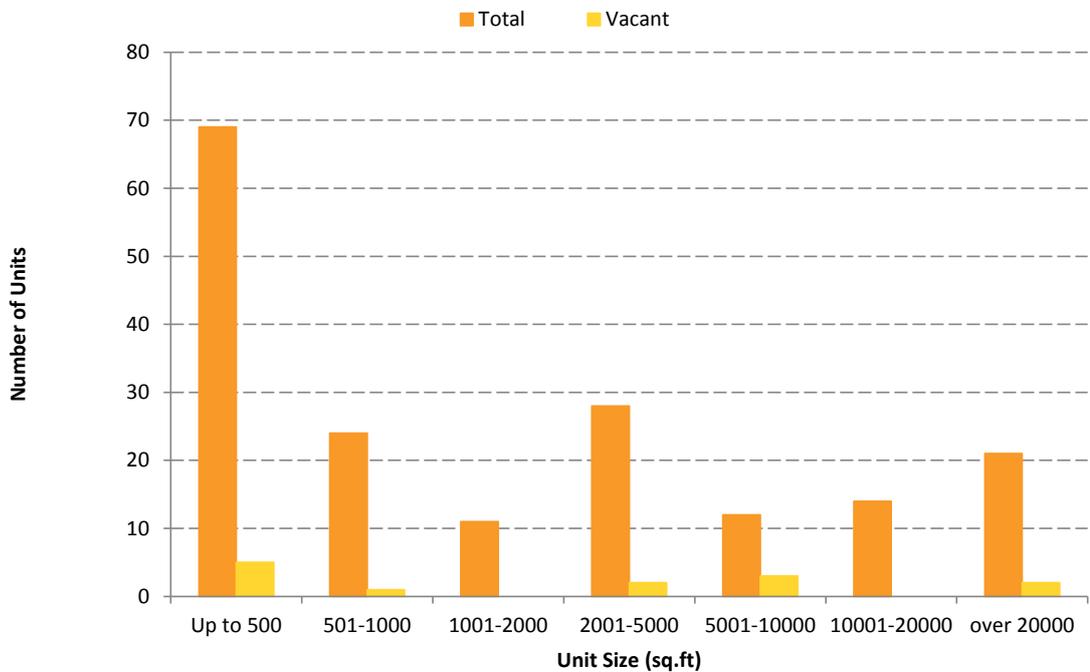
Figure 4.2 and Figure 4.4 illustrate the profile of industrial space within Manor Royal by unit size band, including those reported as vacant²⁹. Figure 4.3 and Figure 4.5 show the total and vacant numbers of industrial premises in Manor Royal by size band.

Figure 4.2 Manor Royal B1c/B2 Space by Size Band



Source: BID, 2017 / Lichfields analysis

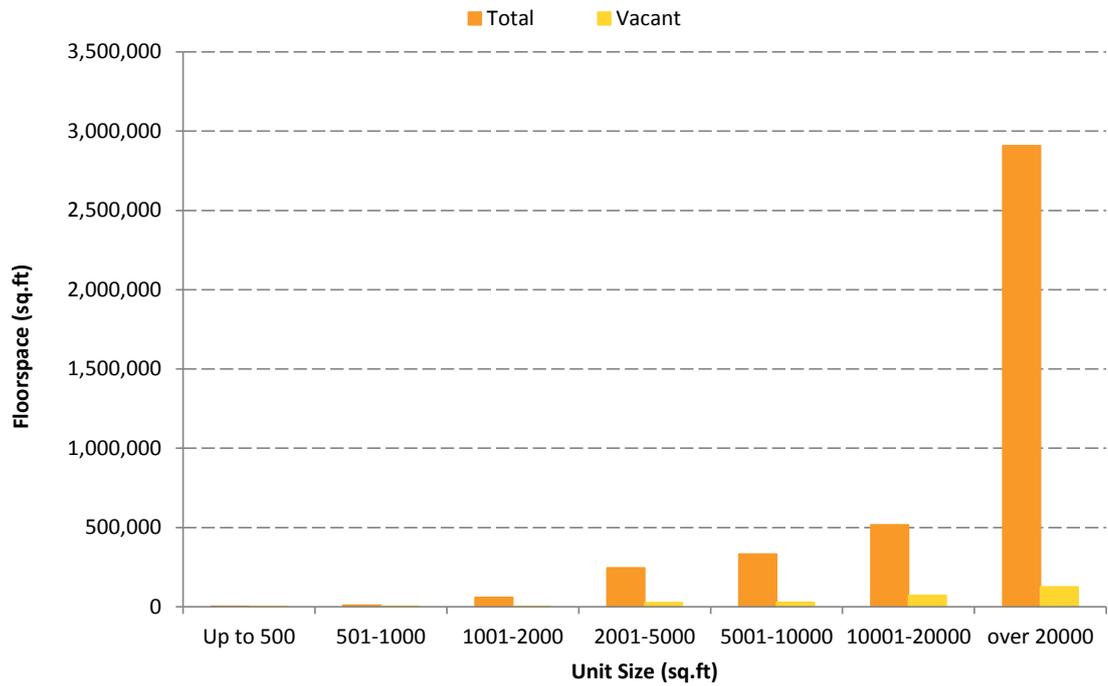
Figure 4.3 Manor Royal B1c/B2 Premises by Size Band



Source: BID, 2017 / Lichfields analysis

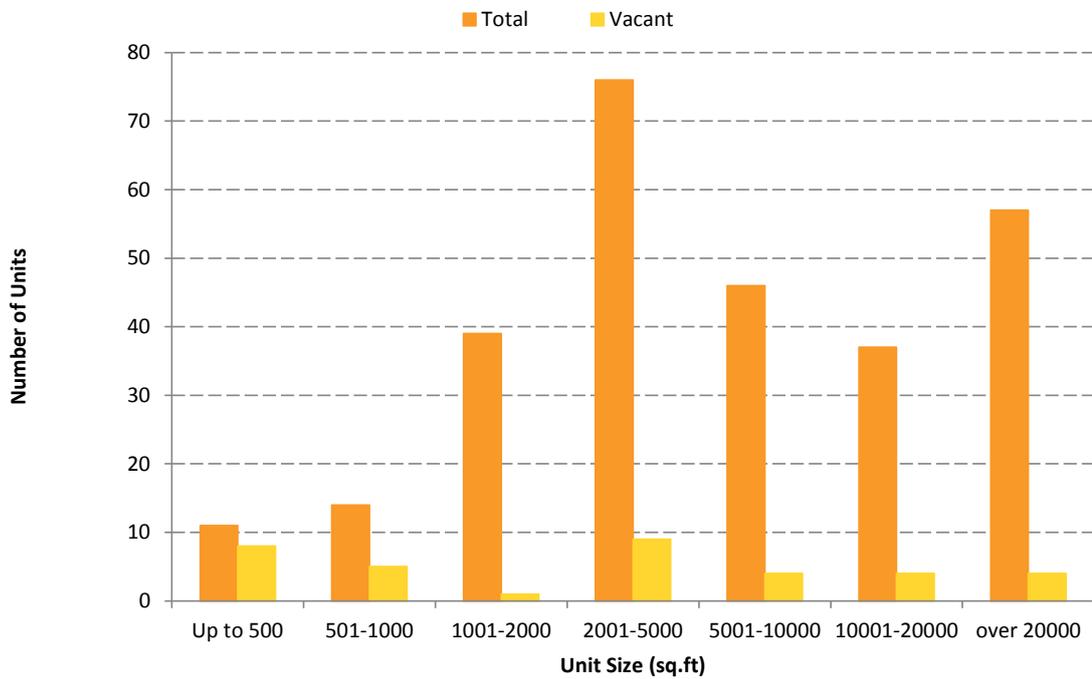
²⁹ Figure 4.2, Figure 4.3, Figure 4.4 and Figure 4.5 are based on data provided by the BID

Figure 4.4 Manor Royal B8 Warehousing Space by Size Band



Source: BID, 2017 / Lichfields analysis

Figure 4.5 Manor Royal B8 Premises by Size Band



Source: BID, 2017 / Lichfields analysis

4.11

These charts indicate that the majority of industrial and warehouse floorspace in Manor Royal is contained in units from 10,001-20,000sq.ft and over 20,000sq.ft in size (88.8% and 84.0% respectively). Out of the total floorspace areas of industrial and warehouse premises, vacancy is estimated at 5.8% of all industrial floorspace and 6.2% of all warehouse floorspace, suggesting an overall low rate of vacancy in the Manor Royal industrial property market.

- 4.12 This pattern reflects feedback from commercial property agents which indicates the availability of industrial premises and land for new industrial development is extremely low within Manor Royal, with market vacancy as low as 1% for B8 space. This has resulted in a very tight market and ‘pent-up’ demand amongst occupiers which is often unable to be satisfied within the current market. If occupiers cannot find what they need, they tend to be displaced to other locations in Crawley Borough (such as Three Bridges Corridor), Salfords, Burgess Hill, or Croydon, albeit industrial vacancy is generally low right across the sub-region.
- 4.13 A combination of strong market demand outstripping limited supply has prompted a return to speculative development in Manor Royal over the last 18 months, with typical rents reported to have increased by around 40% in the last two years. Examples of speculative industrial schemes recently completed and in the pipeline include:
- Gatwick 55: previous airport catering facility on Rutherford Way recently demolished to make way for a new speculative 56,310sq.ft industrial warehouse unit for Barker and Stonehouse.
 - Space Gatwick; a development of three contemporary units ranging between 32,000sq.ft and 47,000sq.ft providing modern, efficient workspace (due for completion early 2018).
 - Crompton Way; a development of two semi-detached industrial units comprising 53,000sq.ft in a prime position to the south of Manor Royal.
 - The Nuts; a new 29,000sq.ft industrial/warehouse facility to be built to a high specification providing a self-contained yard, multiple surface level loading doors and fitted first floor offices.
- 4.14 Table 4.1 below summarises latest headline rents for prime and secondary industrial space for Crawley and a range of selected locations across the wider Gatwick Diamond and southern M25 markets. This indicates that industrial rents in Crawley are similar to other centres in the Gatwick Diamond such as Brighton and Leatherhead, but generally more competitive than M3/M4 locations close to London such as Slough and Weybridge.

Table 4.1 Rental Levels for Industrial Space, 2017 (£ per sq.ft)

Location	Prime	Secondary
Aldershot	£8.50	£7.00
Basingstoke	£8.00	£5.50
Brighton	£10.50	£8.00
Chichester	£7.50	£5.00
Crawley (incl Manor Royal)	£10.50	£8.00
Croydon	£11.00	£8.75
Dartford	£9.50	£7.00
Guildford	£11.00	£8.00
Leatherhead	£11.00	£8.00
Redhill	£9.50	£8.50
Slough	£12.50	£9.00
West Thurrock	£9.00	£6.50
Weybridge	£11.50	£9.50
Woking	£10.00	£7.50

Source: Colliers International

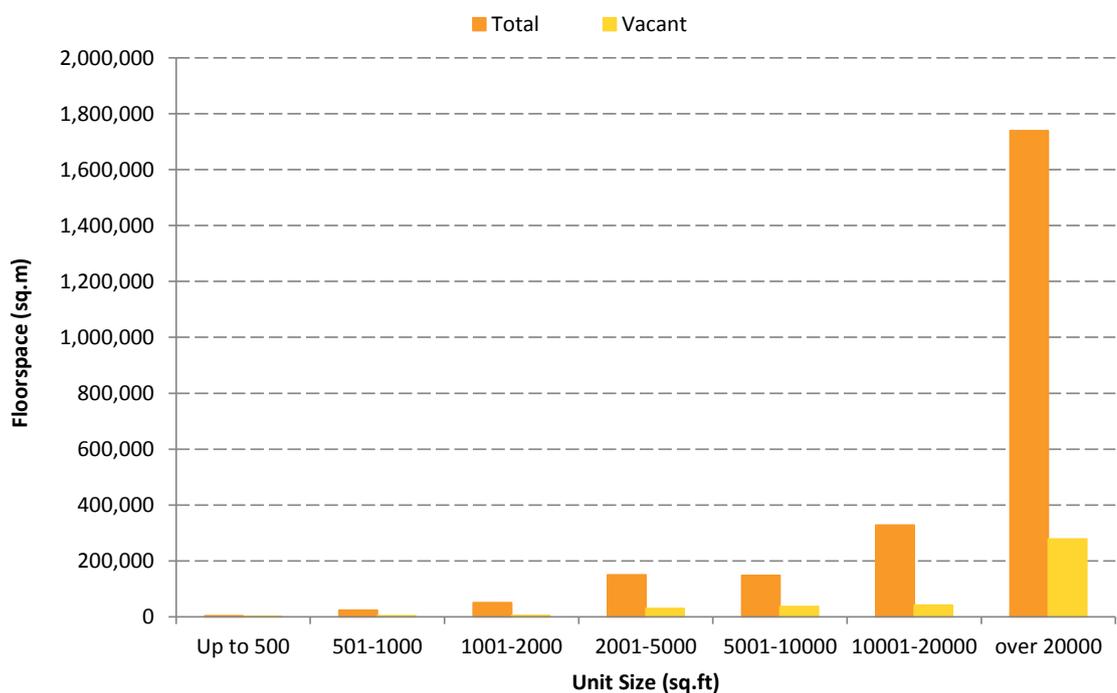
Note: based on values for smaller premises of 10,000 - 50,000 sq ft (929 - 4,645 sq.m) with minimum eaves height of 18ft (6m)

Definitions: prime rents apply to new units, secondary rents apply to second-hand units built during the 1990s

Offices

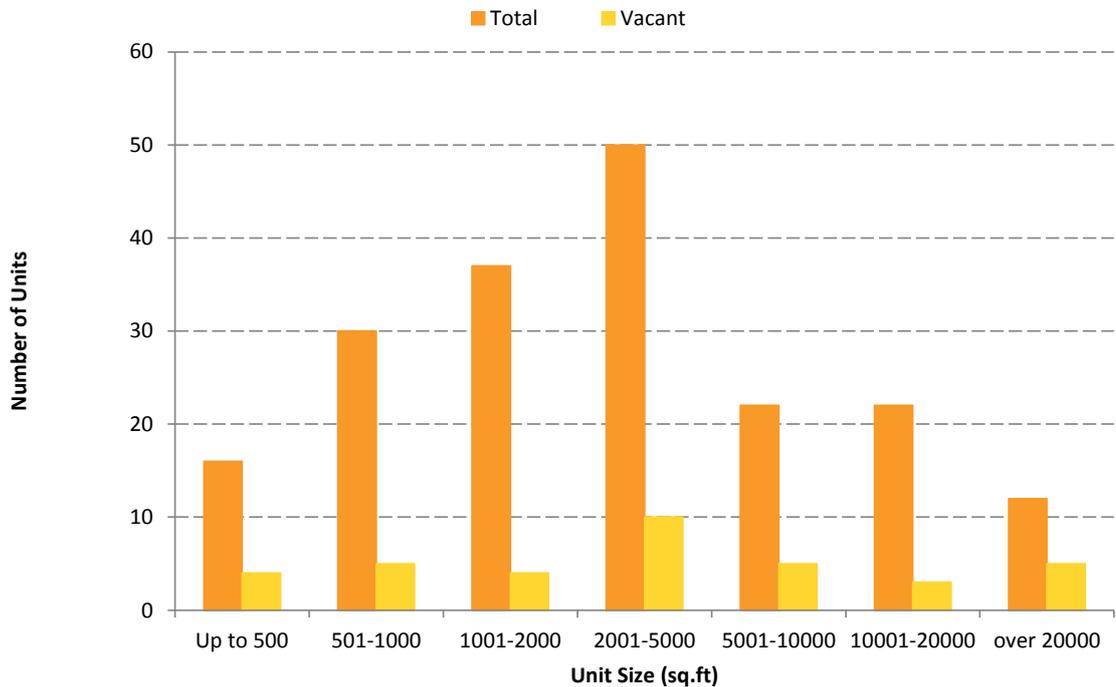
- 4.15 The office market in Manor Royal is less buoyant than industrial and is reported to be one of the slowest office markets in Gatwick Diamond at present. Whilst the relatively subdued nature of the office market is not unique to Manor Royal, property market dynamics do differ from other office centres in the Gatwick Diamond due, as noted in section 3.0, to the presence of an Article 4 Direction preventing the automatic change of use of office accommodation to residential through Permitted Development Rights. In other locations, this policy has effectively removed vacant office stock from the market, keeping vacancy at normal market levels.
- 4.16 What demand there is for office space at Manor Royal is driven by professional services (often seeking a ‘Gatwick HQ’) and more localised SMEs who value proximity to a critical mass of like-minded firms at Manor Royal. Over recent years, a combination of higher density office occupation and increasingly agile working has led to declining demand for larger floorplate office premises, in favour of smaller scale, flexible space. Again, this pattern is not unique to Manor Royal but the Business District has historically been popular amongst larger floorplate occupiers, hence the effect of this policy change has been felt disproportionately.
- 4.17 Figure 4.6 provides a breakdown of total office floorspace in Manor Royal by unit size band. The majority of floorspace is contained in units from 10,001-20,000sq.ft and over 20,000sq.ft in size (84.7%). Vacancy is estimated at 16.2% across the total office stock of Manor Royal, with the highest rate of vacancy in units 5,001-10,000sq.ft in size (24.9%). In addition, Figure 4.7 presents the total and vacant numbers of B1a/b premises in Manor Royal by size band.

Figure 4.6 Manor Royal B1a/B1b Office Space by Size Band



Source: BID, 2017 / Lichfields analysis

Figure 4.7 Manor Royal B1a/B1b Premises by Size Band



Source: BID, 2017 / Lichfields analysis

4.18 In contrast to the industrial market, office rents have seen limited recent growth, suppressed by the high level of existing supply and vacancy; local property agents report that approximately six years’ worth of office floorspace supply is currently available within Manor Royal, representing a relatively high level of vacancy. Whilst occupier requirements for office space can generally be satisfied, office rental levels are insufficient to stimulate speculative development in the current market, and this is unlikely to change over the short term. Recent examples of speculative office development such as the 4-storey Grade A Leonardo Building in the heart of Manor Royal’s Crawley Business Quarter are relatively rare. There are however some encouraging signs of office space renewal at Manor Royal, with a number of office refurbishment schemes in the pipeline, including the refurbishment of a 30,000sq.ft mid-1990s office building into a ‘Manhattan-style’ facility with exposed services and a unique architectural style. This could provide an opportunity to rejuvenate Manor Royal’s portfolio of office space and tap into new occupier markets.

4.19 Table 4.2 below summarises headline rents for prime (Grade A) and secondary office space for Crawley and a range of selected locations across the wider Gatwick Diamond and southern M25 markets. This indicates that prime office rents in Crawley are now lower than most other locations except Epsom, in part reflecting the factors noted above.

Table 4.2 Rental Levels for Office Space, 2017 (£ per sq.ft)

Location	Prime (Grade A)	Secondary (Grade B)
Basingstoke	£17.00	£12.50
Brighton	£27.00	£22.00
Chertsey	£29.00	£20.00
Crawley	£26.50	£17.50
Croydon	£33.75	£20.00
Epsom	£25.00	£15.50
Farnborough	£27.50	£20.00
Guildford	£32.00	£20.00
Leatherhead	£30.00	£24.00
Reading (town centre)	£36.50	£27.00
Reading (out of town)	£34.00	£25.00
Redhill/Reigate	£30.00	£20.00
Woking	£30.00	£21.50

Source: Colliers International

Note: based on values for units of 10,000 sq ft (929 sq.m) taken for a 10-year term

Definitions: prime rents apply to new units, secondary rents apply to second-hand units built during the 1990s

Gaps and Pinch Points

- 4.20 Within this context, it is possible to identify a number of key gaps and pinch points in Manor Royal's commercial property market at the current time. Reflecting the general tightness in Manor Royal's industrial market, this influences the nature of the majority of these gaps and market pressures.
- 4.21 At the smaller end of the market, local agents report a gap in the supply of industrial 'starter units', typically ranging in size from 400sq.ft to 500sq.ft and akin to the types of units available at Basepoint on Metcalf Way. 'Move on' space to expand into is also reported to be in short supply, and represents a current gap in Manor Royal's portfolio.
- 4.22 At the larger end of the size market, availability of industrial units of 20,000sq.ft and above are reported to be in short supply, yet attract good levels of occupier interest and demand in the current market.
- 4.23 More generally, availability of land for new development has significantly reduced over recent years, with any remaining parcels of land having been built out. This echoes the position across the wider M23 corridor market area but means that redevelopment on existing sites in Manor Royal represents the only feasible development opportunity over the short term at least. Indeed, this characterises the nature of various speculative industrial developments currently underway at Manor Royal, as noted above.

Impact of Brexit

- 4.24 The economic impact of changes to the UK's trading relationships following Brexit will vary across the country, as different cities specialise in different products and services, and trade with different countries.
- 4.25 It is difficult at this stage to accurately predict how these changes could affect the Gatwick Diamond, Crawley and Manor Royal specifically over the coming years. Recent research by the

Centre for Cities³⁰ suggests that all British cities are set to be negatively affected as a result of higher trade costs between the UK and EU, and this impact will be greater in the scenario of a 'hard Brexit'. Cities with large shares of employment in private-sector knowledge-intensive services (KIBS), predominantly in the South, are predicted to be most negatively affected due to the increased trade costs linked to Brexit. The research identifies Crawley as being one of the least likely affected cities in terms of anticipated change in GVA, and this underlines Crawley's anticipated resilience to Brexit reflecting the nature of sectors and industries represented here.

4.26 Against the backdrop of continuing economic and political uncertainty, it remains increasingly important that Manor Royal retains its traditional mix and diversity of occupiers in order to try and mitigate against any negative economic effects caused by Brexit as far as possible.

Summary

4.27 The following key findings can be drawn in with respect to the Manor Royal property market:

- a Manor Royal is located in the Gatwick Diamond commercial property market area. However, due to the size of the business district, it also competes against other large centres outside of the Gatwick Diamond such as Croydon, Basingstoke and Guildford unlike other small employment clusters in the Diamond.
- b The industrial property market in Manor Royal is currently tight. Rents have increased by 40% in the last 18 months and the area of developable land has significantly decreased with large recent speculative industrial developments. If occupiers cannot find space in Manor Royal they typically relocate to other places in the Gatwick Diamond (i.e. Burgess Hill) and other locations further away such as Croydon.
- c The office market in Manor Royal is comparatively less buoyant than the industrial market. What demand exists at the moment is generated by interest from professional services and SMEs. However, there is not currently enough demand to encourage speculative development.
- d There are currently gaps in the supply of smaller industrial units ranging in size from 400-500 sq.ft and larger industrial units over 20,000sq.ft. A major pinch point is the lack of available land now for developing new premises to meet demand, which is similar to other parts of the M23 corridor.

4.28 Take away points on the local property market and Manor Royal's recent performance include:

- The majority of demand for commercial space at Manor Royal is driven by industrial users, in particular those seeking distribution and logistics accommodation (B8).
- By comparison, the office market is not as tight, and existing demand is not strong enough to drive speculative development in the current climate.
- Market pinch points and 'gaps' include a lack of smaller industrial units and a lack of available land to provide new premises.
- The full impact of Brexit is currently unknown; however, to mitigate potential impacts Manor Royal should maintain its diverse mix of businesses to avoid being reliant on a few sectors that could significantly decline due to Brexit.

³⁰ Centre for Cities, Brexit, trade and the economic impacts on UK cities, July 2017

5.0 Market Positioning

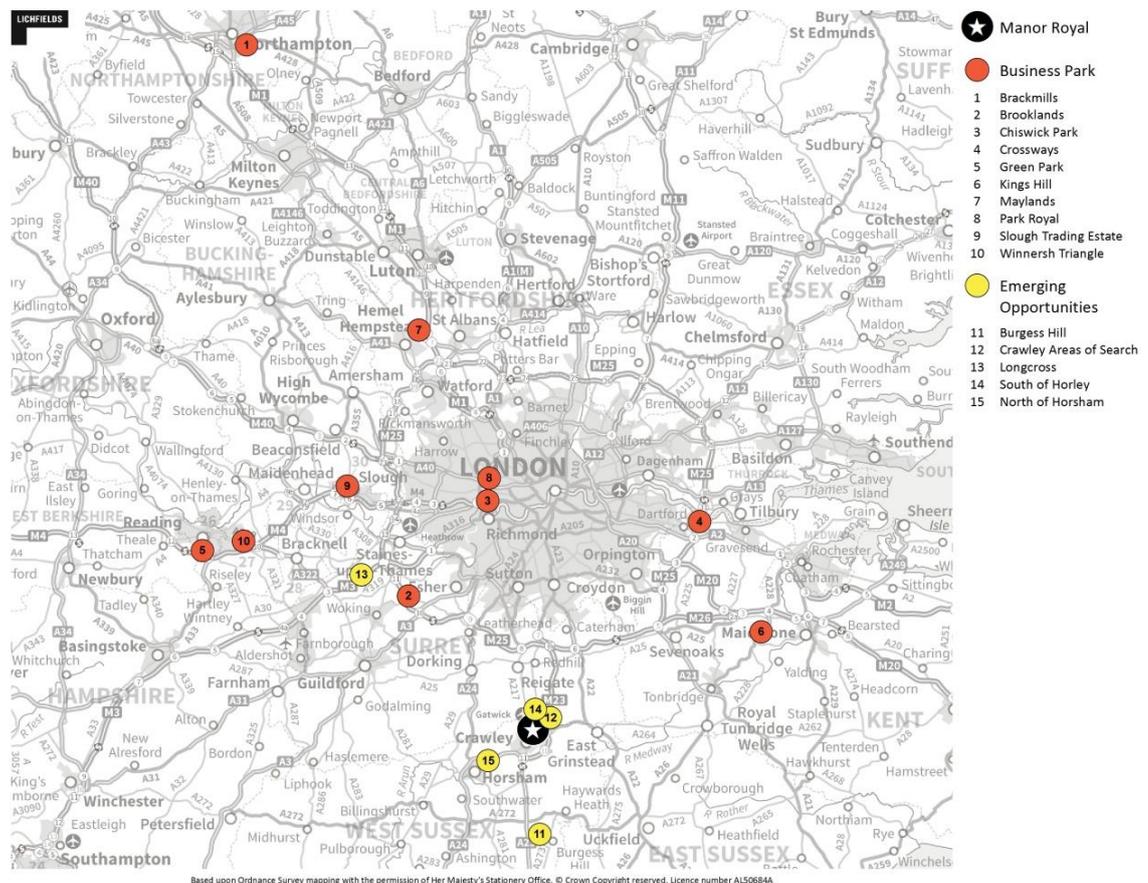
5.1 This section explores Manor Royal’s position and performance relative to other significant business park and employment locations to help identify key selling points and areas for improvement. The analysis takes account of both established locations and also emerging proposals for strategic employment developments located close to Crawley within the Gatwick Diamond. This is used to draw together an overall comparative SWOT analysis for Manor Royal.

Positioning of Manor Royal

5.2 A range of other significant business park and employment locations have been identified to provide a range of comparators for Manor Royal. The analysis updates and expands that presented as part of the 2010 Masterplan report to provide a comparison of how Manor Royal performs relative to other sites on a range of criteria. The aim is to help identify the main selling points of Manor Royal and where the business area could improve in the future.

5.3 The comparators now include a number of additional business parks located around the periphery of London, which operate in similar market conditions to Manor Royal and with a particular focus on mixed sites with multiple ownerships similar to the position within Manor Royal. Additionally, some emerging opportunities have been included that could compete with Manor Royal in the future. The comparator locations assessed are shown in Figure 5.1.

Figure 5.1 Manor Royal Current and Future Comparator Locations



Source: Lichfields

- 5.4 Each site has been assessed against a range of criteria as set out below to give an indication of the relative position of Manor Royal:
- a Site size (ha)
 - b Total Employment as of 2016 based on published ONS data
 - c Range of activities – extent to which there is a mix of different employment activities
 - d Amenities – presence of on-site amenities and facilities for staff
 - e Accessibility – by road and public transport modes
 - f Sustainability and natural environment – environmental performance and access to public open space
 - g Ownership – balance of single or multiple ownership
 - h Site branding – strength and clarity of brand and site profile
 - i Occupier profile – quality and type of occupiers
 - j Business support and coordination – extent of business support activities, including access to starter or incubation space
 - k Scope for development/expansion – potential for additional development or expansion
- 5.5 Each of the above criteria (apart from site size and total employment) has been scored on a scale of 1-5 where 1 = poor/low and 5 = good/high. It should be noted that these scores are indicative only based on a desk-top review of each site and secondary information sources in order to give an assessment of their relative performance. Table 5.1 overleaf provides details of the scoring for each site and is followed by a general description of each site.

Table 5.1 Business Park Benchmarking

Benchmark	Manor Royal, Crawley	Brackmills Industrial Estate, Northampton	Brooklands Business Park, Weybridge	Chiswick Park, Hounslow	Crossways, Dartford	Green Park, Reading	Kings Hill, Tonbridge & Malling	Maylands, Hemel Hempstead	Park Royal, Brent	Slough Trading Estate	Winnersh Triangle
Size (ha)	218	277	100	13	110	115	41	210	500	192	34
Total Employment ³¹	22,000	18,000	10,000	12,000	22,000	11,000	8,000	19,000	43,000	18,000	7,000
Range of Activities	4	4	4	1	4	1	1	4	5	5	3
Amenities	2	3	2	4	4	4	2	1	3	3	3
Accessibility	5	3	3	5	4	3	1	3	5	3	4
Sustainability and Natural Environment	3	2	2	4	4	5	3	1	2	2	3
Ownership	1	1	2	5	3	5	5	1	1	5	5
Site Branding	2	2	2	5	4	5	3	2	5	5	4
Occupier Profile	4	4	3	5	3	5	1	2	3	4	3
Business Support and Coordination	3	3	2	5	1	4	1	3	5	4	3
Scope/Space for Development/Expansion	2	3	1	1	3	5	3	3	3	3	3
Total	26	25	21	35	30	37	20	20	32	34	31

Source: Lichfields analysis/review of site websites and local authority plans and evidence reports

Note these ratings are indicative and no weightings have been applied to each of the benchmarks

³¹ Total employment for each business district except from Manor Royal has been estimated by matching up lower super output areas (LSOAs) as closely as possible to the boundaries of each business district. Total employment for each LSOA has then been taken from ONS Business Register and Employment Survey. LSOAs do not in all cases match up to the boundaries of each business district, so can take into account employment from additional locations outside of a business district and overestimate the actual number of jobs in a district.

- 5.6 The section below briefly describes each of the comparator locations and particularly highlights characteristics or features that could provide learning points for the future management planning of Manor Royal.

Brackmills

- 5.7 Brackmills is estimated to be 277ha in size and employ 18,000 people today. The industrial estate is located on the A45 in the south eastern corner of Northampton. The estate is situated within a short drive of the M1 and has a number of bus stops, no railway station is located within a reasonable walking distance and cycle access is possible via country tracks and busy road junctions. The estate is focused on distribution and manufacturing with an office quarter in the western portion.
- 5.8 Brackmills is similar to Manor Royal in size and also has a BID in place. However, the business areas differ in terms of strategic access, a variety of activities and potential to expand. Manor Royal has access to more forms of transport, is less focused on distribution and manufacturing and has little land to expand on, while Brackmills is surrounded by countryside and not limited by safeguarded airport land.
- 5.9 The Brackmills BID is similar to Manor Royal in that both have websites to act as the main web presence of the business districts. Both BIDs organise community events, offer training courses and provide services such as gritting roads in winter. Brackmills BID has recently helped secure a central facilities hub containing a Greggs, Subway, Pizza Hut and Costa. The facilities hub was developed by a private organisation and did not require public sector investment; however, amenities were limited before with very few facilities available to business district workers.
- 5.10 It should be noted that while Brackmills has a BID, it is located significantly further away from London than Manor Royal and operates in a different commercial property market.

Brooklands

- 5.11 Brooklands business park is located in Elmbridge, just off the M3 and is named after the former aerodrome and motor racing track that was previously located on the site. Today Brooklands is estimated to employ 10,000 people and cover 100ha of land. The park is split into two separate activity areas with industrial and distribution to the west and office activities to the east. Some large international firms have offices in the east area including Sony, Samsung and Procter and Gamble. An A3 junction is within a two-mile drive of the park and Byfleet and New Haw station is located next to the park.
- 5.12 Brooklands is similar to Manor Royal as a diverse business area with a wide range of employment activities. Future development potential is limited like Manor Royal as Brooklands is surrounded by transport routes and buildings. The area has some business coordination through the Business Community Initiative. However, the initiative is focused on business networking and does not carry out the variety of other activities Manor Royal BID does such as public realm improvements.
- 5.13 There is currently no hub facility at Brooklands, instead, there are large Tesco Extra and Marks and Spencer units located in the south of the business district. Both stores have cafes and offer a wide range of goods and services.

Chiswick Park

- 5.14 Chiswick Park is an office park located in the London Borough of Hounslow, employing 12,000 people and measuring 13ha in area. The park consists of twelve large office buildings, which contain a selection of amenities including a Virgin Active Health Club, restaurants, shops and a

bar. The facilities are integrated with into the urban form of the park as they were developed at the same time as the office buildings. Public transport access is good as the park is located close to Gunnersby railway station and Chiswick Park underground station. The park is also a short drive from the M4, though car parking is limited in comparison to out of town business parks.

- 5.15 Manor Royal is very different to Chiswick Park as it is a multi-activity business area, while Chiswick is an inner London office park which operates under single management and ownership. What Manor Royal can potentially learn from Chiswick is strengthening its brand and improving coordination in the business community. Improving the branding of Manor Royal and increasing business support and coordination is already happening through the BID. However, Chiswick has a singular website that fuses together key information (e.g. office availability and current tenants) about the park and has a dedicated extranet for occupiers to access.

Crossways

- 5.16 Crossways business park is located in Dartford next to the A282 and Dartford Thames Crossing. At present 22,000 people are estimated to work within the 110ha of land covered by Crossways. The park has a mix of commercial premises including offices and industrial units. Amenities include a pub, hotels, shops and food outlets. There is a fast track bus service to Dartford, Ebbsfleet and Gravesend from which it is possible to access national rail services including High Speed 1. Stone Crossing station is situated on the park's southern border, but train services are infrequent at two per hour in both directions. The business park suffers from congestion issues in the wider area due to the Dartford crossings, considered one of the worst areas in south east for congestion.
- 5.17 Crossways differs to Manor Royal in terms of newer age of premises, lower development density and significant landscaping which includes a lake in the centre. Both parks have a high number of occupiers, but Manor Royal includes some additional activities such as waste management and has higher plot densities than Crossways due to the more limited areas of landscaping. However, there also limited formal coordination and support at Crossways, which Manor Royal does better through the services provided by the BID. Crossways has slightly higher potential to expand than Manor Royal as there is a large car storage park that could be redeveloped for other purposes.
- 5.18 The two business areas also differ in access to amenities, while Manor Royal has some located in non-strategically placed locations across the park such as County Oak, amenities at Crossways at all strategically placed around the business district lake. The way the amenities are situated around the lake makes the area an organic, landscaped hub to the park, which does not exist presently at Manor Royal.

Green Park

- 5.19 Green Park is situated in the most southern part of Reading Borough next to the Madejski Stadium, employing 11,000 people and stretching across 115ha of land. The Park was originally opened in 1999 and has continued to grow as a business location since. The park has direct access to the M4 and a bus service to Reading station. The grounds are well landscaped, and a 2.3mw wind turbine supplies electricity to the occupiers. There is a service hub located in the south of the business district, which includes convenience shops, a gym, nurseries and dining options. The service hub is located within the business district and therefore will have been built by the developer, without the need for public sector intervention.
- 5.20 Manor Royal and Green Park differ significantly as Manor Royal is a diverse business area, while Green Park is a recently developed office park. What Manor Royal could learn from Green

Park is increasing interactions between the businesses of different employers. Activities are already organised by the BID, but Green Park goes further through organising large-scale social events such as a winter wonderland at Christmas. The Manor Royal Transport Study notes that Green Park suffers from congestion particularly at peak times to access to M4 and on A33 towards / from Reading town centre. This also impacts on bus services serving the Park.

Kings Hill

- 5.21 Kings Hill is a business park located between Maidstone and Tonbridge, situated within Tonbridge and Malling Borough. At present 8,000 people are estimated to be employed within the 41ha of land the business park part of Kings Hill covers. The park was developed as part of the wider Kings Hill new town project. The business park is focused upon offices with a health club also located on the site. To access other amenities workers need to walk into the town centre which has a Little Waitrose, Asda, shops and a pub. There are no strategic roads located near to Kings Hill, and the nearest railway station is located two miles to the north although a shuttle bus is available.
- 5.22 Kings Hill is similar to Manor Royal in that the business park was designed as part of a wider settlement. Except for this instance, the two differ substantially as Manor Royal is significantly larger and is not just dedicated to office activities. Manor Royal falls behind Kings Hill in terms of landscaping and environment. However, it is ahead in the majority of other criteria such as business coordination and support and occupier profile.

Maylands

- 5.23 Maylands is a business area located in the town of Hemel Hempstead, in the district of Dacorum, employing 19,000 people and covering 210ha of land. The business area is the largest in the district and is located close to an M1 junction, providing high-quality road access to the northern and southern parts of England. Like Manor Royal, Maylands contains a high number of occupiers carrying out a wide variety of commercial activities. There are some offices, but distribution and industrial uses are more prominent in the business area overall. The Maylands Partnership group represents the interests of some occupiers and other stakeholders. However, thus far the Partnership has not been able to form a BID as originally proposed in the late 2000s. A draft LDO was also proposed for Maylands covering micro-renewable energy systems in 2011 but was subsequently not adopted³².
- 5.24 Maylands has many similarities with Manor Royal, being located a similar distance away from the Greater London border, is of a similar scale, and has a wide range of occupiers and easy access to a motorway. Manor Royal has better business support and coordination and higher profile occupiers than Maylands. There is more scope to expand at Maylands though at present some of that potential is being eroded due to residential development on the southern part of the business area.
- 5.25 In addition, Maylands has some amenities and facilities scattered around the business district including a small parade of shops in the south western corner, and a cafe in an IMEX office block that is open to the public. In comparison, Manor Royal has a higher number of better quality amenities, which though not located strategically in the business district present a better offer than what is currently available at Maylands. A new hub facility is currently under construction at Maylands as part of a large scale residential development. The hub was originally proposed as part of the Heart of Maylands Development Brief (2010)³³.

³² <https://www.dacorum.gov.uk/docs/default-source/council-democracy/ph-decision---ph-11-011--maylands-local-development-order---statement-of-reasons.pdf?sfvrsn=0m>, accessed September 2017.

³³ Dacorum Borough Council, (2010); Heart of Maylands Development Brief.

Park Royal

- 5.26 Park Royal is located in west London and now under the control of the Old Oak and Park Royal Development Corporation (OPDC). The business area is the largest in Greater London, covering 500ha of land and employing 43,000 people. It is occupied by a variety of different uses including offices, industrial, distribution, retail and waste. Accessibility is good due to proximity to the A40 and multiple rail and underground stations located around the business area. There is no central amenity hub as the business area is very large. Instead, there key points in the district that amenities and facilities have grouped around such as Central Middlesex hospital and new developments in North Acton.
- 5.27 Manor Royal and Park Royal differ significantly in their locations as one is in inner London and the other outside of the M25 next to Gatwick airport. However, both are strategically important because of the locations of each one and have a wide mix of uses. In addition, they are both locked within existing boundaries and have little potential to expand outwards, instead redevelopment of existing sites and potential intensification could provide additional floor space may be the main way forward in the future. Work was done in the OPDC Industrial Land Review to examine the potential for future intensification of industrial uses³⁴.
- 5.28 Park Royal like Manor Royal has varied landscaping and mixed access to facilities due to its size. Given the scale of Park Royal and the current development aspirations for the business district, it is unlikely to require an intervention to improve landscaping and access to facilities. The level of regeneration planned if realised will dramatically change the site, improving landscaping and access to amenities.

Slough Trading Estate

- 5.29 Slough Trading Estate is located in the centre of Slough, covering 192ha of land and employing 18,000 people. The Trading Estate is the largest business area owned by a single landlord in Europe and has businesses utilising all types of B use premises. Strategic road access is available via the nearby M4 junctions, and there are two rail stations (Burnham and Slough) near to the Estate. The size of the Estate means that there are a high number of amenities located in multiple locations including food outlets, gyms and shops. Unlike other modern planned business districts such as Crossways, there is no dedicated facilities hub. The Estate also has a dedicated biomass power plant. The Trading Estate suffers from issues with overflow of parking onto streets in some locations, with peak time congestion near access points.
- 5.30 Manor Royal and Slough Trading Estate are a similar size and contain a large variety of different commercial uses. The two differ in that Slough Trading Estate is owned by the single company (SEGRO), while Manor Royal has fragmented land ownership. In addition, there are increasing numbers of data centres being constructed on Slough Trading Estate. Manor Royal may want to guard against a similar development pattern in the future as the centres do not produce as many jobs as more intensive employment uses (e.g. B1a/b and B1c/B2). If the BID were to gain a simplified planning zone (SPZ) designation for Manor Royal as exists at Slough Trading Estate, criteria could be included to avoid the encroachment of data centres.

Winnersh Triangle

- 5.31 The Winnersh Triangle is a business park located within Wokingham Borough on the edge of the Reading urban area. Winnersh Triangle measures 34ha in size and is home to 7,000 workers at present. The park has direct public transport access through Winnersh Triangle railway station, which is on the Reading to London Waterloo branch line. The park has some amenities

³⁴ OPDC, (2016); Industrial Land Review, https://www.london.gov.uk/sites/default/files/opdc_ilm_draft_new_cover.pdf

including a hotel, restaurant, shop and health club. There is also a cinema over the road from the park. The majority of amenities are set around a hub area that was developed in tandem with other parts of Winnersh Triangle.

- 5.32 Winnersh Triangle has a strong focus on offices and science and technology activities compared to the broader mix of commercial uses within Manor Royal. Winnersh has a more centralised brand than Manor Royal with the dedicated website providing a significant amount of information about the business area. In addition, Winnersh is expanding through redeveloping large car parks into office blocks.

Emerging Locations and Proposals

- 5.33 Table 5.2 identifies a number of emerging employment locations and proposals that could act as competitors to Manor Royal in the future. The four examples are all based in West Sussex, except Longcross which is located in Surrey.

Table 5.2 Emerging Locations Benchmarking

Critical Success Factor	Burgess Hill	Crawley Area of Search	Longcross	North Horsham	South of Horley
Size (ha)	25	-	18	22	30
Accessible location	3	-	4	4	5
Strong relationship with an existing centre	3	5	1	2	5
Access to amenities	4	-	5	2	5
Alignment with strategic policy	5	5	5	5	3
Clear brand/identity	5	1	5	5	2
High-quality landscape/masterplan	Unknown	Unknown	Masterplan in place	Masterplan in place	Unknown
Deliverability/availability	4	1	5	5	2

Source: Lichfields / review of websites and promotion documents

- 5.34 The analysis below reviews the progress made in bringing each of the opportunities forward and considers the likelihood of future competition with Manor Royal.

Burgess Hill

- 5.35 There are two emerging opportunities at Burgess Hill; one is a general business park and the other a science and technology park. Part of the business park called ‘the Hub’ now has planning permission and plans are in place to begin construction to deliver the first commercial unit during 2018. In total, the park currently has permission for up to 600,000sq.ft of mixed B use floor space. The business park is the opportunity more likely to compete with Manor Royal in the short-term as it is currently under construction and will likely have a mix of occupiers closer to Manor Royal. Strategic accessibility is not as good as Manor Royal, but the location is relatively unconstrained and given the proximity to Manor Royal could act as a potential overspill or relocation option for some occupiers at Manor Royal.
- 5.36 A local site study for the science and technology park was completed for Mid Sussex Council in June 2016, which reviewed what sites around Burgess Hill might be suitable for the park³⁵. Based on what published details there is the idea of a science and technology park at Burgess Hill is in the promotion phase and a location has not yet been selected. If the park is eventually

³⁵ Science and Technology Park: Potential Locations Assessment, Mid Sussex District Council (2016)

constructed it is unlikely to compete with Manor Royal, as the business area does not contain a large quantum of science and technology businesses.

Crawley Area of Search

- 5.37 Crawley Borough Council's Local Plan outlines the Council is looking to develop a new strategic employment site north of Manor Royal and to the south or east of Gatwick. The 'area of search' outlined in the Plan is currently safeguarded for the potential development of a second runway at Gatwick, and will not become available unless a second runway is not constructed and the land is released from safeguard.

Longcross

- 5.38 Longcross Park is a planned office development on the existing Longcross Film Studio site. The development is located in Surrey, adjacent of Wentworth golf course and the M3. Despite the location of the site next to the M3, there is no junction onto the M3 within several miles of the site. Longcross is directly located next to Longcross rail station on a branch line that runs between Reading and London. The station at present is poorly served by just 11 trains stopping per day going to London and nine going to Reading. An application has not yet been submitted for the development, but the site has gained Enterprise Zone (EZ) status and at present appears to be making progress towards an application.

- 5.39 Based upon what progress has been made so far with the Park, Longcross will likely be one of the first locations to market. The planned commercial space and location of the site do not make it a direct competitor to Manor Royal as development will be office focused and more likely to compete against office parks in the area close to it, such as Green Park.

North of Horsham

- 5.40 Liberty Property Trust is currently developing a master plan for an urban extension on the north side of Horsham. The current development details include plans for up to 2,750 homes and a 500,000sq.ft business park, primarily composed of high-quality office floorspace. An application was submitted by Liberty to Horsham Council in 2016; however, a decision has not been made yet on the application.
- 5.41 The planned business park is located near to Manor Royal but is different in nature as when developed it will primarily compose of offices, while Manor Royal has a mix of uses. The business park would be unlikely to directly compete with Manor Royal; however, it could potentially draw in higher value occupiers that would otherwise move to offices in Manor Royal. Liberty has not gained planning permission for the business park yet. However, part of the business park is planned to be delivered within five years of gaining permission, with subsequent areas delivered within ten and fifteen years. Therefore, North of Horsham could become a competitor to Manor Royal in the short to medium -term.

South of Horley

- 5.42 The business park proposed on land south of Horley is located north of Manor Royal along the M23, which leads to the Gatwick South terminal. The Crawley Area of Search is located on the other side of the M23 spur. The site is currently being promoted in a joint venture between Reigate and Banstead Council and Millhill Properties, and is now being considered as an employment land allocation in the Council's new Local Plan³⁶. No application has yet been lodged for development, and the delivery timescale is unclear. Any business park on the site is

³⁶ http://www.reigate-banstead.gov.uk/download/downloads/id/2727/horley_strategic_employment_provision.pdf

unlikely to come forward in the short to medium-term, given the site's current planning policy status. Over the longer term however, its proximity to Manor Royal means that it could legitimately compete with Manor Royal for occupiers and investment, depending upon the consented uses and the relative availability of development land and opportunities at Manor Royal.

SWOT Analysis

Strengths and opportunities

- 5.43 Based on the analysis of other existing business parks and emerging opportunities, it is clear that Manor Royal has some USPs and factors that give it some competitive advantage. The USPs and elements that contribute to the competitive advantage of the business district include:
- 1 The location of Manor Royal next to a major airport is unique among the other existing business parks and provides Manor Royal with a strong local source of business, additional connectivity and added prestige;
 - 2 Manor Royal, while located next to Gatwick, is not completely dependent on business from the airport. There are a wider variety of other businesses involved in non-air related industries;
 - 3 Manor Royal is highly accessible through its close location to the M23 and A2011, railway services via Crawley and Three Bridges stations and the ability to access high-quality air services through Gatwick airport;
 - 4 The BID has made good progress in bringing together the business community and has developed services to help develop Manor Royal. Similar business parks such as Brooklands, Maylands and Crossways do not have such an initiative in place or have not made as much progress as the Manor Royal BID has; and
 - 5 The emerging opportunity South of Horley is unlikely to be developed for some time, so Manor Royal will continue as the main employment location around Gatwick in the future. Longcross is closer to completion, but is office based and is more likely to compete against other similar business parks such as Chiswick Park and Green Park as well as the wider M3 corridor.
- 5.44 Out of these factors the ones which the BID could exploit the most to continue the success of Manor Royal are the proximity to Gatwick Airport, and the progress the BID has made in providing services, coordinating businesses and helping develop the Manor Royal 'brand'. It has also helped to establish a greater shared identity amongst businesses on the site and shared ownership of the area's future direction. Manor Royal has strong economic ties with Gatwick, which also offers increased mobility for Manor Royal businesses. By increasing cooperation between Manor Royal and Gatwick, there could be potential benefits for both in the future, for example through the continued investment in public transport.

Weaknesses and Challenges

- 5.45 Manor Royal has some weaknesses and challenges that could affect the continued success of the business area in the future. These weaknesses and challenges include the following:
- 1 The environment and landscaping of Manor Royal is lower quality (but improving) than some other existing business parks (e.g. Crossways). Manor Royal is an older estate, which was not planned out in the way newer business parks are today. This element is important to helping on-site businesses attract and retain talented staff;

- 2 Access to amenities from Manor Royal requires improvement. There are retail units, hotels and food outlets, but these are spread out through the business area and are not as accessible from parts of the area. There is no dedicated facilities ‘hub’ designed specifically with business users in mind, for example with access to meeting rooms;
- 3 Unlike a number of the other existing business parks, Manor Royal has fragmented and multiple ownership and there are no significant public sector land holdings that can assist with land assembly. However, it is not the only business park in this situation, others such as Brooklands and Maylands have the same challenge;
- 4 The Manor Royal brand is not yet as strong as other business parks – many businesses refer to ‘Gatwick’ in their address rather than Manor Royal – and does not have a coherent ‘look and feel’ that signifies a premium employment location; and
- 5 Manor Royal is constrained by the urban area surrounding it and safeguarded land for a second runway at Gatwick. To expand in the future current sites will need to be redeveloped intensified. However, similar business parks such as Brooklands are facing the same future challenge. The lack of obvious land for expansion may deter investors or impact on the ability to retain existing businesses seeking to expand.

5.46 Manor Royal’s strong economic ties with adjoining Gatwick Airport also leave the business area susceptible to wider economic changes that may occur and affect the Airport in future years, such as key Government decisions regarding runway capacity in the South East and implications posed by Brexit such as the perceived attractiveness amongst international investors of Manor Royal/Crawley as a UK business location. However as mentioned previously, the mix and nature of economic sectors represented in Crawley will help to boost the Borough’s economic resilience to Brexit and the challenges it is likely to pose.

5.47 Table 5.3 overleaf shows how Manor Royal compares on types of amenities against the other business districts reviewed in this section to consider where the amenity and services offer of the business district could be improved. The work of the BID over the coming years should focus upon initiatives and measures to bridge these gaps as far as possible, to improve the experience of existing business occupiers at Manor Royal and to boost the relative attractiveness of the business area across the wider Gatwick Diamond and beyond. Some suggested priorities and next steps are set out in further detail in the Action Plan in Chapter 8.0.

Table 5.3 Audit of Business District Facilities

Benchmark	Manor Royal, Crawley	Brackmills Industrial Estate, Northampton	Brooklands Business Park, Weybridge	Chiswick Park, Hounslow	Crossways, Dartford	Green Park, Reading	Kings Hill, Tonbridge & Malling	Maylands, Hemel Hempstead	Park Royal, Brent	Slough Trading Estate	Winnersh Triangle
Dedicated Hub Facility	No	Yes	No	Yes	Yes	Yes	No	No	No	No	Yes
Site information/management function	Yes	Yes	No	Yes	Yes	Yes	Yes	No	No	Yes	Yes
Flexible workspace/co-working facilities	Yes (e.g. Base Point Business Centre)	Yes (Regus Centre)	Yes (Regus Centre)	Yes (In General Offices)	Yes	Yes (Onsite Business Centre)	Yes (Onsite Business Centre)	Yes (Onsite Business Centre)	Yes	Yes	Yes
Shared meeting/conferencing facilities	Yes (e.g. Premier Inn)	Yes (In Hotel)	Yes (Regus Centre)	Yes (In General Offices)	Yes (In onsite Hotel)	Yes (Dedicated Centre)	Yes (Onsite Business Centre)	Yes (Onsite Business Centre)	Yes	Yes	Yes (In onsite Hotel)
Café/restaurant	Yes (e.g. County Oak Retail Park)	Yes	Yes (In Retail Park)	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Convenience retail outlets	Yes (e.g. County Oak Retail Park)	No	Yes (In Retail Park)	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Outdoor/recreation space	Yes	No	No	Yes	Yes	Yes	Yes	No	Yes	No	Yes
Gym/fitness centre	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Crèche/nursery	No	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes
Bank/ATM	Yes (e.g. County Oak Retail Park)	Yes	Yes (In Retail Park)	Yes	No	Yes	No	Yes	Yes	Yes	Yes
Pharmacy	Yes (e.g. County Oak Retail Park)	No	Yes (In Retail Park)	No	No	No	No	No	Yes	Yes	No
Post Office	Yes (Not in Hub)	No	Yes	No	No	No	No	Yes	Yes	Yes	No
Cycle storage/hire	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Car club/electric vehicle charging	No	No	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes

Source: Lichfields

Summary

- 5.48 In comparison to other existing business parks, Manor Royal has advantages including good strategic access links, a wide variety of uses and a developing business community through the work of the BID. There are also some areas which could be improved upon to enhance the offer of the business district such as improved branding, access to amenities and landscaping.
- 5.49 Manor Royal has lower quality landscaping and environment in comparison to a number of the other business districts reviewed in this section including Green Park, Crossways and Chiswick Park. These business districts were all constructed by a single developer and therefore the landscape was designed around the commercial buildings. However, Manor Royal has a higher quality landscape in comparison to business parks with more similar characteristics (e.g. multiple developers and landowners) such as Maylands and Brackmills. In the long-term it would be worthwhile continuing to improve Manor Royal's environment and landscaping to maintain an advantage over similar business districts.
- 5.50 The amenity and facilities offer of Manor Royal is currently spread throughout the business district, with a key centre at County Oak retail-park. There is no dedicated facilities hub. There are less of amenities on the eastern side of the business district, creating a geographically uneven provision. Table 5.3 indicates that in terms of its service offer, Manor Royal is relatively well served compared to other similar business districts such as Brackmills and Maylands. However, the service offer of both districts is now being improved through new hub facilities. The hubs have been delivered through private sector investment either by developing a brand new facility where there was none, or by combining the development of a hub as part of a wider development (e.g. with residential). It should be noted that while the hub at Brackmills was developed through private investment, the amenity offer of the business district is not of the same level of Manor Royal and there may have been strong underlying demand for a hub.
- 5.51 Continuing to centralise the Manor Royal brand and offer of the BID could help improve the offer of the business district. Manor Royal has a more centralised and distinguished brand than business parks with similar characteristics such as Brooklands and Maylands. However, more recently developed parks such as Crossways have a stronger brand identity. It should be noted that Manor Royal does not directly compete against business districts such as Green Park and Chiswick Park, as these are only composed of offices.
- 5.52 Out of the emerging opportunities, Longcross and one of the two developments planned in Burgess Hill are the closest to coming on the market. Longcross is not a direct competitor to Manor Royal as the development is office only and located outside of the Gatwick Diamond. The park is more likely to compete against business parks located close to it such as Green Park. The Burgess Hill development will provide new industrial and distribution units, potentially bringing it into competition with Manor Royal. However, it could also support the business district by acting as an overspill location for businesses that cannot get the premises they need at Manor Royal, due to the lack of available land to expand onto.
- 5.53 North of Horsham could act as a medium-term competitor to Manor Royal, subject to phasing and delivery. However, the planned development would focus solely on offices and therefore would only compete against the office offer of Manor Royal. The two opportunities located near to Manor Royal (Crawley Area of Search and South of Horley) both also represent longer-term competitors to the business district. Future development in Crawley is currently constrained due to the safeguarding of land at present for the possibility a second runway could still get built at Gatwick, while South of Horley is only at the allocation phase present, but could emerge as a significant competitor particularly if the development capacity of Manor Royal remains constrained. However, there is also the possibility that South of Horley could act as an overspill

area for Manor Royal, creating a wider linked business area around Gatwick airport. Key take away points for this section are summarised below.

- The wider property market area within which Manor Royal operates is characterised by a number of existing business parks and strategic employment sites, some of which actively compete with Manor Royal for occupiers and investment.
- There are various new proposals in the pipeline which could add to this overall competition over the short, medium and longer term. These include North of Horsham and South of Horley.
- It will be beneficial for the BID to continue improving the landscaping of Manor Royal to remain attractive to occupiers and to 'keep up' with similar, competing business districts.
- Manor Royal has a varied amenities and facilities on offer; however these are currently relatively dispersed across the business district and latent demand exists for a new service 'hub' facility in a central location.
- The BID should continue to develop the Manor Royal brand, which is not as strong and prominent as other business districts.

6.0 Scope for Intensification and Growth

- 6.1 This section examines the ability of Manor Royal to accommodate different types of development and the feasibility of developing sites at higher densities over the coming years. This has been prepared in the context of reducing land availability at Manor Royal and increasing pressure on a finite supply of land to accommodate economic growth and business development going forward.

Meeting Future Needs

- 6.2 As noted in section 3.0, economic evidence base work prepared by Lichfields as part of the 2014 Northern West Sussex Economic Growth Assessment and subsequent update for Crawley (2015) identified a significant land requirement for new business in Crawley, resulting in a shortage of land or unmet requirement of around 35ha over the period to 2030. As the largest and most important employment site within the Borough's boundary, this places significant pressure on the land supply at Manor Royal increasing the need to identify land within Manor Royal for potential intensification or redevelopment.
- 6.3 Given that Manor Royal has essentially reached its current physical limits, there is an inevitable focus on maximising the potential development footprint within the existing site envelope. This means identifying and analysing opportunities for intensification in terms of what can be realistically achieved and how more intensive use of space might be delivered. This could include the need for associated infrastructure such as green space and other amenities. Furthermore, any assumed intensification has to be capable of being accommodated by site occupiers and aligned to market/business needs for space if there is to be a strong prospect of delivery.
- 6.4 Increasing intensity of development (i.e. plot ratios) is mainly driven by more efficient site layouts and, in some cases, the transition to vertical mixed-use development typologies where these are appropriate and land values can support these. Such approaches are more practical where sites are within single ownership or control or benefit from a clear planning framework.
- 6.5 A key requirement of the study brief is to review intensification opportunities at Manor Royal to understand what could realistically be achieved in terms of new development going forward, and practically how it can be delivered. The results from this analysis are summarised below, with further, full details included in Appendix 6.

Baseline Assessment

- 6.6 In order to inform this review, a baseline assessment of modern office and industrial schemes approved in Manor Royal since 2014 has been undertaken as shown in Figures 6.1 and 6.2 overleaf. From these, a range of indicative development parameters has been identified as shown in Table 6.1. below.

Table 6.1 Development Parameters for Exemplar Developments at Manor Royal

	Example office developments		Example industrial developments	
	Average	Highest	Average	Highest
Building footprint to site ratio (%)	18	21	42	58
GEA floorspace to site ratio (%)	73	83	50	67
Height (storeys or equivalent)	4	4-5	3	4
Parking type	Surface/decked		Surface	

Source: Lichfields analysis/review of planning application documents

Figure 6.1 Manor Royal Exemplar Office Developments



Location of Manor Royal Example Office Developments



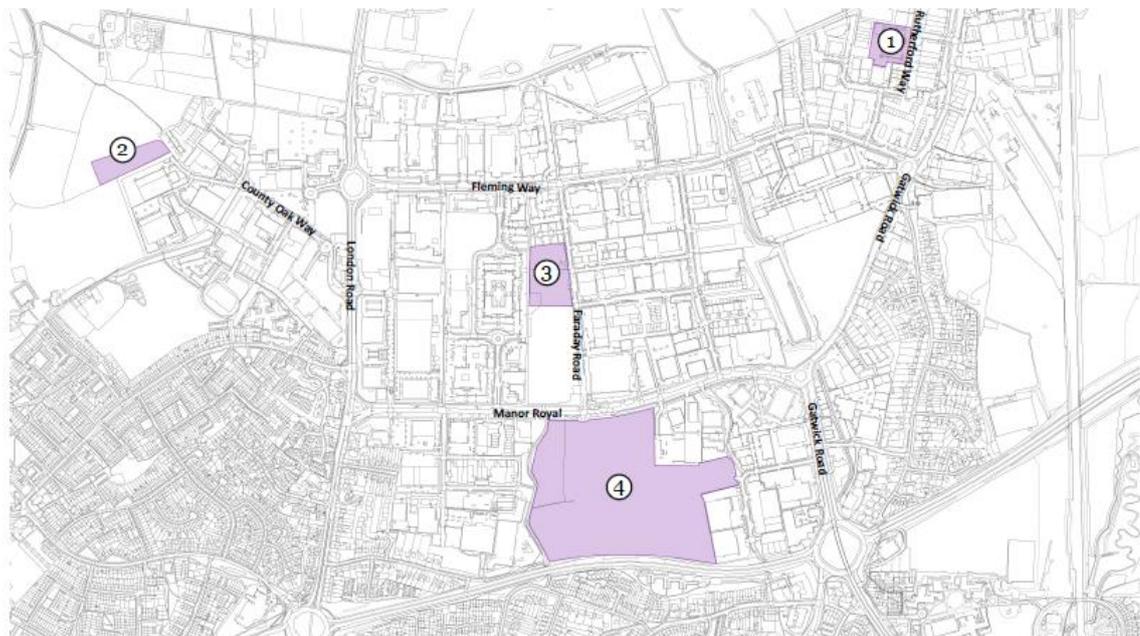
1. Leonardo, Crawley Business Centre

2. Nexus, Gatwick Road

3. Elekta, Cornerstone, Manor Royal

Source: Lichfields analysis

Figure 6.2 Manor Royal Exemplar Industrial Schemes



Location of Manor Royal Example Industrial Developments



1. 5 Rutherford Way



3. Space Gatwick, Faraday Road



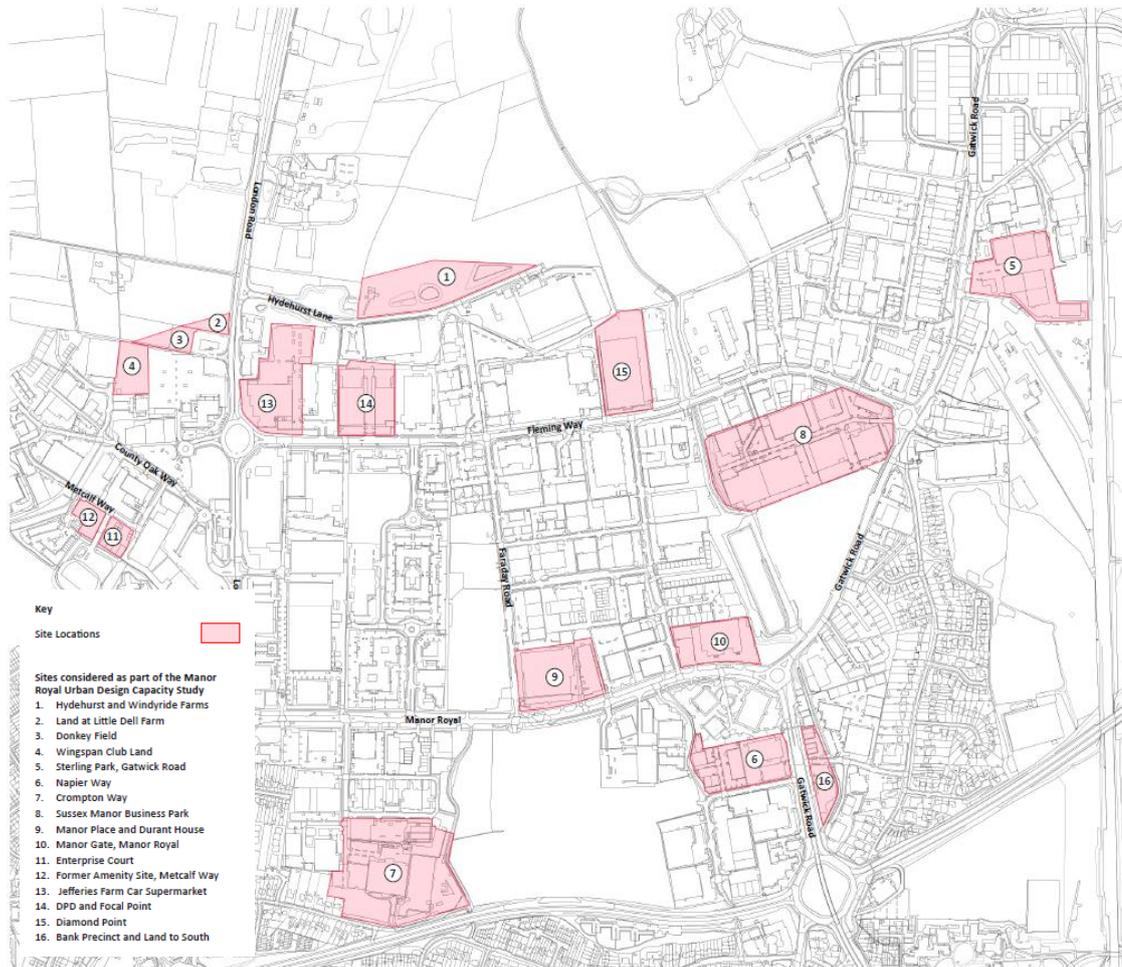
4. Principle Park

Source: Lichfields analysis

Sites Overview

- 6.7 In conjunction with the BID and CBC, a portfolio of sites within Manor Royal have been identified for the purposes of this study which are considered to theoretically have potential to be used more intensively and efficiently in future (over the Local Plan period to 2031).
- 6.8 A sample of 16 opportunity sites were identified as having scope for additional office or industrial development as shown in Figure 6.3 below. These sites have been chosen for the purposes of testing the principle for developing them more intensively should the opportunity arise, for which there may not be the necessary land/property owner or occupier appetite. It is not the intention of this study to dictate how these sites should be developed, merely to test the theoretical potential for doing so more intensively. They have been chosen on the basis of age, current lease break position and to achieve a spread of possible opportunities across the site. This sample does not reflect the overall development capacity of Manor Royal and other intensification/redevelopment opportunities may become available in the future.

Figure 6.3 Site Redevelopment Opportunities



Source: Lichfields

- 6.9 Each of these sites has been analysed in terms of a range of urban design and other development principles based upon the site context and reflecting townscape considerations such as sensitive adjoining uses, site access and existing building heights. The development capacity of each site for office and/or industrial uses as appropriate has then been calculated, with reference to the development parameters set out in Table 6.1.
- 6.10 The intensification analysis principally comprised a desktop appraisal based upon aerial maps (Source: Google, 2013) and a site visit undertaken in order to identify any areas of apparent potential surplus space within the sample of sites considered. Sites with apparent surplus space were then considered for **intensification**. For each opportunity site, full **redevelopment** of the site has been considered; this assumes full clearance of the existing site. Further details about the intensification analysis and a summary of the outputs are included at Appendix 6.

Intensification Opportunities

- 6.11 Two sites were identified as having the potential for intensification as follows:
- 1 Sterling Park, Gatwick Road (two plots totalling 0.28ha) – potential for either office or industrial uses, with capacity for up to 2,223 sq.m B1a and 1,182 sq.m B1c/B2.
 - 2 Land at Crompton Way (two plots totalling 1.55ha) – potential for industrial uses only, with capacity for up to 10,366 sq.m B1c/B2.

Redevelopment Opportunities

- 6.12 All 16 sites identified have been considered as potential opportunities for more comprehensive redevelopment. A summary of the estimated maximum capacity of these sites is set out in Table 6.2 overleaf. This indicates a total maximum capacity of 173,000 sq.m for industrial uses, and 103,000 sq.m for office uses. These figures reflect the use of maximum development parameters, and some sites have been identified suitable for industrial or office uses, so in reality, the capacity would be less than these headline figures. Scope for mixed-use schemes has not been specifically considered.

Table 6.1 Maximum Development Capacity of Redevelopment Sites

	1. Hydehurst and Windyride Farms	2. Land at Little Dell Farm	3. Donkey Field	4. Wingspan Club Land	5. Sterling Park, Gatwick Road	6. Napier Way	7. Crompton Way	8. Sussex Manor Business Park	9. Manor Place and Durand House	10. Manor Gate	11. Enterprise Court	12. Former Amenity Site, Metcaif Way	13. Jefferies Farm Car Supermarket	14. DPD and Focal Point	15. Diamond Point	16. Bank Precinct
Potential use(s)	Industrial	Office	Office	Industrial	Industrial	Industrial/office	Industrial	Industrial/office	Industrial	Industrial/office	Industrial	Industrial	Office	Industrial	Industrial	Industrial/office
Building footprint (sq.m)	13,456	420	798	3,712	13,514	9,918 (industrial) 3,581 (office)	26,796	34,336 (industrial) 12,432 (office)	11,542	7,830 (industrial) 2,835 (office)	1,914	1,682	4,662	9,570	10,904	4,002 (industrial) 1,449 (office)
Potential GEA (sq.m)	16,240	1,660	3,154	4,288	15,611	11,457 (industrial) 14,193 (office)	30,954	39,664 (industrial) 49,136 (office)	13,333	9,045 (industrial) 11,205 (office)	2,211	1,943	18,426	11,055	12,596	4,623 (industrial) 5,727 (office)
Potential ancillary area (sq.m)	9,744	1,580	3,002	2,688	9,786	7,182 (industrial) 13,509 (office)	19,404	24,864 (industrial) 46,768 (office)	8,358	5,670 (industrial) 10,665 (office)	13,86	1,218	17,538	6,930	7,896	2,898 (industrial) 5,451 (office)
Parking type	Surface	Surface/decked	Surface/decked	Surface	Surface	Surface/decked	Surface	Surface / decked	Surface	Surface / decked	Surface	Surface	Surface / decked	Surface	Surface	Surface / decked
Floorspace % Change[¥]	-	-	-	-	+39%	+719%	+277%	+311%	+84.6%	+188%	+31%	-	+164%	+59%	+19%	+1,336%

Source: Lichfields analysis

¥ Net change or uplift compared with existing floorspace on site

Note: Analysis based on site visit and desk-top review for illustrative purposes only. Subject to detailed consideration in terms of relevant planning policy and guidance, highway capacity and access, investigation of site conditions and utilities/services, and operational requirements of existing and future site users.

Note: No granted planning applications/permissions have been considered as part of the redevelopment scenarios.

Other Factors Relating to Site Intensification/Redevelopment

- 6.13 The potential development capacity of/within the opportunity sites will need to be verified in detail in due course, considering matters such as: planning policy and guidance, parking standards, highway capacity and access, site conditions, features and services, operational needs/ requirements and future expectations of existing and future users. As set out in Appendix 6, development potential of the opportunity sites may be informed or constrained by, but not limited to, the following factors:
- Surrounding land uses and building heights;
 - Proximity of existing development adjoining site boundaries;
 - Existing vegetation/water features;
 - Proximity to Gatwick Airport Safeguarded Land;
 - Building height against the Gatwick Aerodrome Safeguarding;
 - Impact upon existing operations of surrounding area; and
 - Changes in site levels and site shape.
- 6.14 Some of the opportunity sites, as identified in Appendix 6 also have an existing high building footprint to site ratio which appears to maximise the usage of the site. Redevelopment of such sites may result in an overall decrease in development capacity due to modern development seeking to increase parking and service provision through planning policy requirements and standards.
- 6.15 More generally, the ability to redevelop sites across Manor Royal more efficiently and effectively in future will depend to a large extent upon the provision of supporting infrastructure to 'keep up' with the pace and nature of development. Specific infrastructure issues and constraints are considered in more detail through technical evidence base studies, although of particular note and relevance to the EIS are car parking provision and road/highways capacity, both of which have presented challenges in bringing forward intensification opportunities at Manor Royal in recent years (most recently the proposed Northwood Park office development on Gatwick Road where highway capacity issues needed to be addressed). Whilst responsibility for funding major infrastructure works ultimately rests outside of the BID itself, there could be a useful co-ordination and advocacy role for the BID to play in raising awareness of infrastructure issues of critical importance amongst its public sector partners to ensure that infrastructure funding is spent on tackling those issues of highest priority within the Business District.
- 6.16 A key source of potential funding could include Local Growth Funding following the recent announcement of £14.64 million investment through the Local Growth Fund (administered by Coast to Capital LEP) for the Crawley Growth Programme; an investment package of infrastructure improvements and physical regeneration designed to support significant increases in new homes, business investment and employment growth within Manor Royal and Crawley town centre. In particular, sustainable transport infrastructure and highway upgrades are planned to boost overall transport capacity and enable a significant shift from car usage to bus, rail, cycling and walking alternatives³⁷.
- 6.17 The key take away points from this section are presented below.

³⁷ <http://www.regeneratingcrawley.org.uk/content/major-local-growth-fund-investment-crawley>

- Through intensification and redevelopment of existing sites, there is potential to increase the stock of commercial floorspace at Manor Royal in the future.
- Enabling future development will largely depend on the provision of the right type of infrastructure; in Manor Royal the issues of road capacity and car parking are particularly pertinent.
- Funding larger infrastructure rests outside of the BID's resources. Therefore, the BID could act as an advocate for raising awareness of Manor Royal's infrastructure issues and gain funding from other sources such as the Local Growth Fund.

7.0 Planning Mechanisms for Growth

7.1 This section provides a review of available planning mechanisms that might be practically used within Manor Royal to facilitate appropriate development and allow this to come forward more quickly, and draws this together to provide an overall assessment of the potential applicability of the mechanisms to Manor Royal. This has been prepared with reference to examples of where similar initiatives have been adopted at other major employment sites and business locations.

Simplified Planning Zones

7.2 Simplified Planning Zones (SPZs) are areas of land earmarked for specific development where the planning process is relaxed in order to encourage development and investment. They follow a land-use zoning approach whereby the local planning authority specifies appropriate use classes through the SPZ for a defined location. Provided that development proposed complies with the SPZ scheme, there is no need to obtain planning permission in the normal way.

7.3 The scheme must specify whether planning permission is unconditional or subject to conditions, limitations or exceptions, which class(es) of development are permitted and the land it relates to. The scheme can be altered but exists for 10 years. Local authorities are required to notify the Secretary of State to either make or amend an SPZ and there is also a requirement for consultation with interested parties such as landowners and the Environment Agency.

7.4 An SPZ has been in place at Slough Trading Estate since 1995 and was renewed in 2014 for a further 10 year period³⁸. It sets out a range of conditions that have to be met in order that some types of development, mostly datacentres, warehouses and research and development centres, can be built without the need to apply for an individual planning permission. The SPZ has played a critical role in helping Slough to attract and retain business investment in the town, and SEGRO (as the single landowner) to deliver world-class industrial premises in a high-quality environment.

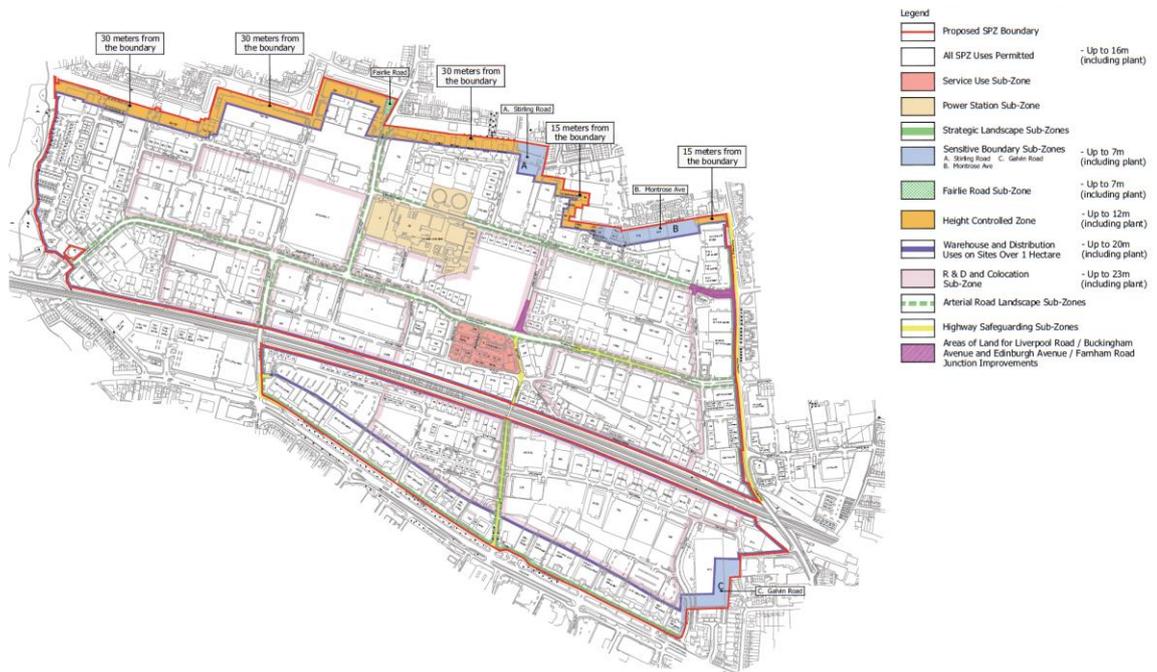
7.5 Through a linked Section 106 agreement, the SPZ provides for better management of the site and mitigation of impacts associated with development built out under the SPZ including:

- an umbrella travel plan, which includes a 'Hoppa bus' service between Slough and Burnham Rail Stations and improvements to local pedestrian, cycle and bus access to Burnham Station.
- provision of the 'Aspire' skills training centre, which has been developed by SEGRO in partnership with other employers on the Trading Estate; and
- measures relating to maintenance of street lighting, landscaping and improvements to way-finding.

7.6 The SPZ area is outlined in Figure 7.1 below.

³⁸ Slough Trading Estate SPZ Scheme, 2014-2024, <http://www.slough.gov.uk/downloads/SPZ-complete-scheme.pdf>

Figure 7.1 Slough Trading Estate SPZ



Source: Slough Borough Council

Local Development Orders

- 7.7 A Local Development Order (LDO) provides a simplified approach to planning within a designated area by reducing formal planning controls and establishing extended permitted development rights in addition to those which are established by central government (where these have not been removed through Article 4 Directions). By streamlining procedures, development can proceed without the time and costs implications of having to submit planning applications. The LDO provides the greatest certainty by defining the types of developments that will be acceptable and can be undertaken without the need for planning permission.
- 7.8 An LDO will normally grant conditional planning permission for development falling within defined use classes. Certain exemptions may apply, for example, development within Schedule 1 of the Environmental Impact Assessment Regulations. Prior to the commencement of development on an individual site or plot, plans would be submitted to the local planning authority for confirmation of conformity with the LDO. Other conditions may be established to provide development thresholds and parameters.
- 7.9 To establish an LDO, the Council would need to prepare the necessary documentation, including a 'Statement of Reasons', which would be subject to formal consultation. The LDO must then be submitted to the Secretary of State for adoption and placed on the Planning Register. Once adopted the local authority must produce an annual monitoring report to assess the impact of the LDO.
- 7.10 LDOs are generally more prescriptive than SPZs with a greater focus on policy requirements (i.e. working in conjunction with an adopted Local Plan) rather than just defining acceptable use classes. An LDO can be revoked at any time without the need for consultation compared to SPZs which are formally in place for 10 years, although in practice many LDOs have a defined time period.

- 7.11 LDOs have been established for a number of major employment locations, for example, Milton Park in Oxfordshire³⁹, and within the Harlow Enterprise Zone⁴⁰. These are both examples of broad LDOs focused on use classes (Milton Park) and sectors (Harlow). More focused LDOs are also possible, for example, Dacorum Borough Council consulted on the adoption of an LDO to permit micro-renewable energy systems on any industrial, warehouse, business and commercial buildings within the Maylands Business Park to encourage take-up of solar panels and green roofs⁴¹.

Business Neighbourhood Plans

- 7.12 A Neighbourhood Plan forms part of the statutory development plan and is written by representatives of the local community. Neighbourhood Plans were introduced in 2011 through the Localism Act, with the purpose of making local planning more democratic by allowing people and businesses to undertake the planning for their areas. They should conform to other adopted planning policy documents and the NPPF.
- 7.13 Business Neighbourhood Development Plan areas can be designated in locations that are wholly or predominantly used for business, for example, industrial estates, business parks or town centres. The process of bringing a Neighbourhood Plan forward for a designated business area is the same as for any other neighbourhood area. The same legal requirements, in terms of consultation and publicity, must be met. The key difference for Business Area Neighbourhood Plans is that they are tested by two referendums – one for residents and one for businesses operating in the area. If both referendums agree (i.e. either both say yes or both say no) the decision is binding on the local authority. If the two referendums return a different decision, it will then be for the local authority to decide whether they should bring the Plan into legal force.
- 7.14 A Business Area Neighbourhood Plan for Central Milton Keynes was successfully made part of the statutory development plan in 2015⁴². The ‘CMK Alliance Plan 2026’ was prepared by an alliance of Central Milton Keynes Town Council and local business leaders. It sets out a spatial strategy for achieving growth and managing development in the town centre from 2011 to 2026. The Plan proposes to expand and diversify the retail offer of CMK, to encourage the development of new office space and to promote mixed-use areas at higher densities.
- 7.15 The Plan also sets qualitative targets in terms of the development of new office and retail floorspace and residential units. These are guided by the targets set out in the adopted Core Strategy, though in some cases the Neighbourhood Plan has identified a more ambitious target for commercial development. For example, the Neighbourhood Plan identifies a target of 208,500 sqm of office (B1) floorspace, against a Core Strategy figure of 180,000 for Central Milton Keynes. The Plan is an example of local businesses working with public sector organisations to guide planning policy to support the continued growth of Central Milton Keynes.

Enterprise Zones

- 7.16 Enterprise Zones (EZs) were introduced in 2012 and there were 48 in place nationally as of April 2017. The scope of EZs extends beyond purely planning policy to include other measures such as reliefs on business rates and capital allowances, although provisions are made for use of Local Developments Orders (as above).

³⁹ http://www.whitehorsedc.gov.uk/sites/default/files/Adopted_LDO_v10b_FINAL.pdf

⁴⁰ <http://www.harlow.gov.uk/harlowldo>

⁴¹ <https://www.dacorum.gov.uk/docs/default-source/council-democracy/ph-decision---ph-11-011--maylands-local-development-order---statement-of-reasons.pdf?sfvrsn=0>

⁴² <https://www.milton-keynes.gov.uk/planning-and-building/planning-policy/central-milton-keynes-neighbourhood-plan>

- 7.17 Businesses that locate on an Enterprise Zone can access a number of benefits:
- up to 100% business rate discount worth up to £275,000 per business over a 5-year period;
 - simplified local authority planning, for example, through LDOs that grant automatic planning permission for certain development (such as new industrial buildings or changing how existing buildings are used) within specified areas;
 - Government support to ensure that superfast broadband is rolled out throughout the zone, and, if necessary, public funding; and
 - 100% enhanced capital allowances (tax relief) to businesses making large investments in plant and machinery on 8 Zones in Assisted Areas.
- 7.18 All business rates growth generated by the EZ is retained by the relevant Local Enterprise Partnership (LEP) and local authority in the defined area for a period of 25 years to reinvest in local economic growth.
- 7.19 Applications for EZs are made to Government by LEPs in conjunction with local partners, although the application process is currently closed and the status of any future rounds of new EZs is unknown.

Comparison of Mechanisms

- 7.20 Table 7.1 overleaf provides a summary of the comparative advantages and disadvantages of the different mechanisms outlined above, and their potential resource implications

Table 7.1 Comparison of Planning Mechanisms

Mechanism	Description	Advantages	Disadvantages	Resource implications
Simplified Planning Zone (SPZ)	Defined zoning scheme removing the need for express planning permission for specific land uses	<ul style="list-style-type: none"> • Greater certainty for developers • Ability to react to markets more quickly • Facilitate faster delivery of new development 	<ul style="list-style-type: none"> • Focus on broad land uses can be a limitation in terms of acceptability of some uses • Difficulty in responding to changing market needs if too prescriptive 	<ul style="list-style-type: none"> • Initial evidence and preparation required • Loss of planning application fees to LPA • Ongoing monitoring and enforcement for LPA
Local Development Order (LDO)	Extension of permitted development rights for specified types of development	<ul style="list-style-type: none"> • Greater certainty for developers • Ability to react to markets more quickly • Facilitate faster delivery of new development • Flexibility to be used for strategic and more detailed purposes (e.g. minor works) 	<ul style="list-style-type: none"> • Meeting criteria set out in LDO may require similar work as a standard planning application • Effectiveness relies on scope of what is included, and balancing flexibility with prescription • Reduced consultation opportunities for public/neighbours 	<ul style="list-style-type: none"> • Initial evidence and preparation required • Loss of planning application fees to LPA • Potential time/resource savings to LPA as a result of fewer minor applications
Business Neighbourhood Plan	Plan created for defined business area that becomes part of the statutory development plan	<ul style="list-style-type: none"> • Alignment with existing Local Plan and/or future review • Ability to allocate specific sites for development and set targets for future growth/development 	<ul style="list-style-type: none"> • Business community view may not align with Local Plan approach and/or future review • Requires legal mandate through referenda and/or LPA agreement 	<ul style="list-style-type: none"> • Need for LPA to support initial evidence and preparation, as well as process of independent examination
Enterprise Zone *	Range of planning and fiscal measures to incentivise business investment in designated area	<ul style="list-style-type: none"> • Wide package of measures, including financial benefits to LEP/local authority • Direct financial benefits to businesses that could attract new firms to area • National profiling benefits 	<ul style="list-style-type: none"> • Currently closed to applications for new EZs • Likely to be more effective for sites with greater land availability and/or single ownerships 	<ul style="list-style-type: none"> • Initial evidence and preparation required to make application • Cross-working required with other agencies (e.g. LEP) • EZ management post(s) likely to be required

Source: Lichfields analysis

* Note: provisions extend beyond planning policy considerations

Applicability to Manor Royal

- 7.21 As noted in section 3.0, the planning policy starting point for Manor Royal is provided by the adopted 2015 Crawley Local Plan. Specifically, policies EC2 and EC3 resist the net loss of employment floorspace and permit development within B-class uses and promote high quality design and landscaping. These are supported by the Manor Royal Design Guide which was formally adopted as a Supplementary Planning Document in 2015. This addresses matters relating to landscaping, road frontages and specific considerations on particular locations within Manor Royal. These policies apply to the wider Manor Royal site including beyond the BID area.
- 7.22 Given the general presumption in favour of B-class uses within current Local Plan policies for Manor Royal, there would appear to be less specific need to consider an SPZ or LDO from a strategic land-use perspective. The benefit would essentially be in relation to expediting the planning process for existing businesses and potential future occupiers, replicating the approach that has been applied to some other major employment sites elsewhere. Both measures are, in essence, methods of improving the certainty and efficiency of the development management process.
- 7.23 In the context of the adopted planning policies and design guidance that already apply at Manor Royal, it is considered that a detailed (as opposed to strategic) LDO could prove most beneficial by permitting minor operational development. The exact detail of what could be covered by any proposed LDO should be discussed and agreed by Crawley Borough Council and Manor Royal BID but could include (albeit not be limited to):
- minor extensions (subject to certain parameters and conditions to ensure such measures support, and do not undermine, the planning and operation of Manor Royal);
 - changes to external appearance of buildings, including recladding, alterations to doors and windows;
 - changes to access to buildings;
 - organisation of vehicle parking areas;
 - provision of cycle parking; and
 - provision of covered bin stores.
- 7.24 This would reduce the time and costs for businesses and occupiers by removing the need to apply for full planning permission for minor works and alterations where they comply with the parameters of the LDO, which would be replaced with a pre-development notification form for consideration by the Council. The existing Local Plan policies (specifically Policy EC3) and statutory Design Guide would give a robust basis for this approach but also ensure safeguarding of the requirement for high quality development and landscaping.
- 7.25 While SPZs and LDOs are measures generally focused on the development management process, business-led neighbourhood plans give the opportunity to supplement the adopted Local Plan through the adoption of an additional statutory plan for the local area. This can be particularly useful in cases where there is not an up-to-date Local Plan in place, although this does not apply in Crawley where the Borough Plan was adopted in 2015.
- 7.26 Neighbourhood plans include powers to make site allocations and are generally able to go beyond SPZs and LDOs in helping to define a future vision for growth (in planning terms). As noted above, there are significant legal processes required in the preparation and adoption of a neighbourhood plan including the referendum process. However the existing BID structure within Manor Royal would likely make the implementation process easier by effectively giving the BID a direct role within the statutory planning process which it does not hold currently.

7.27 In the context of the need to frame opportunities for intensification and redevelopment (as set out in section 6.o), a business-led neighbourhood plan could provide potential mechanisms for defining site-based opportunities in greater detail compared to the strategic-level policies set out in the Local Plan. For example, it could introduce a policy direction for the potential location and delivery of a new facilities hub within Manor Royal. A business-led neighbourhood plan would therefore go further than the LDO approach, but be similarly grounded within the existing Local Plan and Design Guidance. However, it is worth noting that the preparation and adoption of a neighbourhood plan would take time and require significant resources, as well as a referendum process. A business-led neighbourhood plan should therefore be considered as a longer-term opportunity, at least until such time as the Crawley Borough Local Plan has been reviewed which is expected to take place in the next few years and would provide an earlier opportunity to review the current Manor Royal policies.

7.28 EZs have been a feature of Government policy for the past 5 years, although it is not currently clear whether there will be any future application rounds. The real benefits of EZs, and the main criteria for selection by Government are derived from where there can be the greatest uplift in development and additionality of economic impacts. EZ status also confers an important place-branding and profiling role which is typically used to help attract investment. While EZ status (subject to future rounds) would give Manor Royal an added competitive advantage, the benefits may be modest on the basis of the current constraints to significant future development and multiple land ownerships that exist.

7.29 The key takeaway points from this section are presented below.

- Existing Local Plan policy favours B-class uses in Manor Royal, so there is less specific need to introduce an SPZ or LDO at the business district from a strategic land perspective.
- The use of an LDO for simplifying the process for gaining permission for minor alterations based on existing design guidance could be beneficial, and reduce costs and delays for businesses.
- In the longer-term a business neighbourhood plan could be considered, though this would take time and require additional resources to complete.
- Allocating an Enterprise Zone could provide Manor Royal with an additional (if modest) competitive advantage, given the limited areas of land available for future development.

8.0 Recommendations and Action Plan

- 8.1 This section draws together the preceding analysis to identify overall recommendations for supporting the future growth of Manor Royal, and more specifically, outlines an action plan to help guide the activities of the BID and its partners.

Manor Royal's Economic Performance

- 8.2 As explored and set out as part of this study, Manor Royal makes a significant contribution to the economy of Crawley and the Gatwick Diamond, employing a high number of people, supporting supply chain jobs and contributing to the public purse. Over recent years and since the previous Masterplan was developed in 2010, the Business District has been growing and further cementing its position and role as one of the South East's premier business locations. This is demonstrated through greater levels of economic output (measured by GVA), increases in business rates payments and an overall increase in the stock of business space recorded at Manor Royal. The employment count has decreased slightly over the period since 2010 although this reflects the re-location associated with one large employer, with the wider business base gradually growing.
- 8.3 As indicated in this report, the key challenges faced by Manor Royal in maintaining this role and competitiveness as a business location over the coming years relate to land supply and the ability to accommodate development within its existing boundary, maintaining the profile of Manor Royal against the backdrop of strong and growing competition, and a number of operational and amenity issues which if addressed, have the potential to greatly enhance Manor Royal's appeal to business occupiers over the coming years. These are described in more detail below.
- 8.4 Multiple-ownership represents an over-arching challenge faced by Manor Royal and limits the extent to which future economic growth and diversification can be actively planned for and delivered in a genuinely holistic way. It is this characteristic that necessitates the presence of the BID at Manor Royal and also provides the rationale for public-private partnerships to operate here in order to achieve growth ambitions and required improvements. It also provides a point of differentiation between other competing sites across the wider South East, some of which are singularly controlled and operated and are therefore well placed to respond to specific occupier requirements and wider economic change in a timely manner. Going forward, the BID has an increasingly important role to play in addressing the 'gaps' and issues identified by this study to achieve those shared economic growth objectives that fall beyond individual occupiers or developers to deliver.

2010 Masterplan Recommendations

- 8.5 The current Masterplan for Manor Royal was prepared in 2010 to provide strategic direction for the future growth and development of the Manor Royal Business District. It set out a summary of the current offer and issues facing Manor Royal and identified the approach and strategy to development in the future. This included setting out the delivery strategy and key interventions required to achieve change, identifying key partners to bring this change forward.
- 8.6 A key requirement of the brief for the EIS is to undertake a broad review of the current 2010 Manor Royal Masterplan with a view to updating its recommendations taking account of the changed circumstances in Manor Royal itself and the wider environment in which it operates and looks to compete. Table 8.1 below provides a summary of the key recommendations and suggested actions from the 2010 Masterplan, alongside an overview of progress that has been made since 2010 and the need for ongoing action if applicable. This is based upon a range of

analysis undertaken as part of the EIS and feedback obtained from a wide range of stakeholders including BID levy payers, BID representatives, property market agents and public sector practitioners.

Table 8.1 Review of 2010 Masterplan Recommendations

2010 Masterplan Recommendation	Progress made since 2010	Suggested action(s) (if applicable)
Developing The Planning Policy Framework / An Appropriate Planning Policy Approach	Progress has been made here, including through development and adoption of the Crawley Local Plan (in December 2015) and its specific Policy EC3 guiding future economic growth at Manor Royal. In addition, the Manor Royal Design Guide SPD and Public Realm Strategy were both published in July 2013.	In addition to Local Plan policies, there is considered to be scope to make more pro-active use of planning mechanisms to overcome existing barriers or hurdles to development and streamline the planning process to the benefit and appeal of business occupiers. This could include preparation of an LDO relating to various minor operational works and alterations within Manor Royal, as set out in more detail below.
Creating The Heart - delivery of the Manor Royal Hub	None (beyond some initial feasibility work)	A strong theme emerging through this EIS is the need for improved business facilities and staff amenities at Manor Royal, and this is a particular area of weakness compared with competitor locations. Further commentary about potential delivery mechanisms to bring forward a Hub facility is provided below.
Enhancing The Quality Of Place & Accessibility	Good progress has been made over the first term of the BID, with many tangible outcomes and improvements (e.g. to public spaces, improved signage and legibility, highway and pedestrian improvements)	Improving the quality of place is fundamental to improving the attractiveness of Manor Royal as a business location both in terms of business retention and inward investment. Whilst good progress has been made, there are still areas for improvement, as identified within recent occupier surveys and infrastructure audit. These technical evidence base studies also identify a number of areas of focus for the coming years, and this has helped to inform a number of emerging Business Plan actions.
Improving Public Realm & Open Spaces	As above.	As above.
Signage & Legibility	Good progress has been made over the BID's first term, by developing a consistent set of signage across Manor Royal, in turn improving the permeability of the site and increasing its functionality as a business location.	Stakeholder feedback gathered as part of the study suggests that more could be done by the BID to help to integrate Manor Royal more effectively with the rest of Crawley and publicise the availability of nearby facilities and amenities more positively. This includes more effective wayfinding to link Manor Royal with Crawley town centre and raising awareness of its proximity to the town centre and Gatwick Airport through the good provision of public transport facilities that exist, but might not be widely known.

2010 Masterplan Recommendation	Progress made since 2010	Suggested action(s) (if applicable)
Highway Improvements	The BID has made good progress since inception through better public transport integration, improved walking/cycling infrastructure and through junction capacity enhancements.	Technical evidence recently prepared on behalf of the BID (i.e. by SDG in 2016) examines existing transport issues in and around Manor Royal and presents a series of recommendations and actions to address key barriers and issues. Some of these actions are already being implemented by the BID and as part of the Crawley Growth Programme in partnership with West Sussex County Council and Crawley Borough Council, following a £14.6m Local Growth Fund investment package secured from the LEP.
Pedestrian & Cycle Improvements	As above. There are also a number of planned schemes to Gatwick Road and London Road, as well as Langley Walk to Metcalf Way cycle route improvements.	As above.
Raising The Image & Perceptions Of Manor Royal	This has been a key area of work by the BID over recent years through development of a Manor Royal brand, new arrival signage and Manor Royal website.	Notwithstanding the progress that has been made to date, feedback collected as part of this EIS study suggests that significant scope remains to enhance the profile of Manor Royal as the South East's leading mixed use commercial centre and promote this more widely, particularly in the face of growing competition from established and new employment centres and business parks. Further detail and recommendations are set out below.
Supporting & Engaging Businesses	This includes 'soft' support for businesses and ensuring that those businesses at Manor Royal that require support to grow and develop are able to receive it in a timely manner. Some progress has been made on this over the last few years.	No specific issues or concerns have been raised as part of this EIS regarding the provision or availability of business support at Manor Royal. This forms an important part of the BID's day-to-day role and remit, so the BID should carefully monitor this strand of work and respond to specific opportunities, needs or gaps as and when they arise.
Continued Business Support Framework	As above. This covers both general and targeted business support, with example projects including bespoke training courses, Manor Royal Procurement Hub and an HR Forum.	As above.
Targeted Support For High Growth Businesses	As above.	Going forward, this type of intervention will be crucial in protecting, nurturing and growing existing sectoral strengths within Manor Royal and in retaining/attracting firms that can provide high quality, high skilled jobs within the Borough. A wealth of economic data and intelligence on business demography is included within this EIS and the Northern West Sussex EGA completed in 2015, and this should be used by the BID in conjunction with the Council's Economic Development team to develop a

2010 Masterplan Recommendation	Progress made since 2010	Suggested action(s) (if applicable)
		strategy and programme of integrated activity to make further progress in supporting high growth businesses going forward.
Improving Sustainability	Some progress has been made on enhancing the sustainability credentials of Manor Royal through interventions which address both new development and the upgrading of the existing built stock. These include Greening Manor Royal, BREEAM Excellent buildings being planned and built and delivered. However, as shown in Chapter 5.0 Manor Royal performs more poorly than other competitor business locations on this measure.	Scope for further improvements and enhancements over the next term of the BID, supported by a technical evidence base that informs and makes recommendations about specific interventions and priority measures.
Cultural Organisation Of Manor Royal	Strong progress has been made by the BID over the last few years to engage businesses in the future regeneration of Manor Royal and achieving buy-in and support for investment decisions. This cuts across many different interventions and projects and most recently includes the introduction of a series of Manor Royal Rangers to provide a 'go-to' point of contact between the BID and Manor Royal's various occupiers.	Feedback obtained as part of the EIS from various stakeholders suggests that there is scope to build on this success – including establishment of the BID itself – to further engage with Manor Royal's business community and develop a more comprehensive and collective a sense of ownership of Manor Royal. The BID could use its networks and influence to more effectively connect occupiers to find shared solutions to commonly cited problems and issues, for example relating to provision of underutilised meeting space and car parking.

Source: Manor Royal Masterplan (2010) / Lichfields

Overall Recommendations

- 8.7 Following this review of the 2010 Masterplan delivery strategy and recommendations in the context of the EIS, a number of themes or areas of work emerge as being particularly important and critical to enabling Manor Royal to overcome challenges to economic growth and prosperity going forward. These themes are translated below in the form of recommendations and areas for action, and should be used to help guide and shape BID activities over the coming years in support of continued business development at Manor Royal.

a) Positioning and Brand

- 8.8 The work of the BID over the past five years has played a major role in strengthening the Manor Royal brand and, as feedback from consultations indicated, also helping to create a stronger sense of a business community. In this context greater strategic economic focus will be required to help guide the future direction of Manor Royal – this can build on the successes of the past five years, but recognising the key challenges the BID and partners face include:
- a The very real physical limits to growth that Manor Royal faces, and the wider perception this creates that Manor Royal is ‘full up’ – some capacity has been identified but it requires greater certainty of delivery to help future-proof the district’s ability to grow.
 - b The shifting balance of uses reflecting the relative (current) market strength of B8 distribution uses and weakness of the B1a office sector – Manor Royal’s longevity owes much to its diversity of activities – but also seeking to maintain higher value elements of the economy that underpins its contribution to the Gatwick Diamond and regional economy.
 - c The emergence of new competitors, most notably those in close proximity. Continued investment in the fabric and functioning of the site, and reinforcing the networking effect between businesses based at Manor Royal, will help create loyalty and protect against relocations elsewhere. However, this needs to be considered in the context of a) and b) above – opportunities for some ‘strategic moves’ to open up some capacity, within Manor Royal that could in turn facilitate new development could be helpful.
- 8.9 The current vision for Manor Royal was developed from an understanding of how Manor Royal functions, the potential it offers for future growth, and the key interventions required to develop its offer. It is set out in the 2010 Masterplan:
- “By 2026 Manor Royal will have evolved in to the South East’s leading mixed-activity employment hub, providing modern business accommodation, a range of supporting amenities and achieving environmental excellence to drive the growth of Crawley and the Gatwick Diamond economy.”*
- 8.10 As noted above, significant progress has been made since 2010 in achieving this overall vision, in a large part due to the establishment of the Manor Royal BID and as a result of the various programmes of work undertaken by the BID over its first five year term. Much improvement and new development has come forward in Manor Royal in the period since the adoption of the Masterplan in 2010, and the Business District has continued to evolve showing tangible changes and improvements.
- 8.11 Analysis and consultation undertaken as part of this EIS underlines this success, but also suggests that much still needs to be done to build upon Manor Royal’s economic performance and stay ahead of the competition as other established business parks continue to evolve and improve their offer to business occupiers and as new employment locations emerge with a suite

of USPs and competitive advantages to offer businesses (not least the crucial supply of land). Whilst there is not considered to be a need to change the overall vision for Manor Royal set out in the 2010 Masterplan, the emphasis should be changed slightly to refer to Manor Royal ‘continuing’ to represent the South East’s leading mixed-activity employment hub, rather than ‘evolving into’.

- 8.12 Manor Royal’s diversity (in terms of the mix of uses, occupiers and premises) has traditionally been an important strength and provides a unique selling point – and will remain important over the coming years particularly in light of continued economic and political uncertainty and emerging competition from elsewhere in the Gatwick Diamond and beyond. There should continue to be a focus on attracting and accommodating high-value, knowledge-intensive economic activity that generates strong levels of economic output and productivity for the local economy, alongside a wider mix of uses (some of which may be lower value or less intensive) that continue to value Manor Royal and the diversity of space on offer.
- 8.13 Retaining this mix should ideally be supported by local planning and economic policy, recognising the challenges that can come with such flexibility, for example in relation to traffic movements and complementarity of neighbouring uses. Equally, the finite capacity of land at Manor Royal means that caution should be taken to allowing other ‘non B’ uses to proliferate, whereby potentially undermining the credibility and viability of the area for more traditional business uses. This should represent a key consideration for Crawley Borough Council as part of the forthcoming Local Plan Review.
- 8.14 At the same time, the BID (and its partners) have an important role to play in ensuring that the wider, supporting environment is fit-for-purpose; the public realm, facilities, amenities, business community and support and brand are all important considerations and will need to be enhanced regardless of the relative balance between different uses. This wider, supporting environment forms the key focus of the BID’s new Business Plan, published in December 2017.
- 8.15 A common area of feedback emerging from the stakeholder consultation undertaken as part of the EIS is that Manor Royal is not well known as a leading and successful business location beyond the confines of Crawley and the surrounding Gatwick Diamond area. Whilst the Business District has been successful in the past in attracting and retaining businesses without a particular need for external profile raising and promotion of opportunities, this is likely to become more important over the coming years as new development opportunities emerge elsewhere across the sub-region and compete with Manor Royal for businesses and investment. It is also likely to become increasingly important for Manor Royal to continue to attract and retain high value, knowledge intensive occupiers and activity, alongside the ongoing work of the BID to enhance the quality, appeal and facilities on offer in the business district.
- 8.16 If the overall economic vision for the site (as noted above) remains broadly consistent over the coming years, there would be merit in developing a more targeted and focused strategy for promoting the Manor Royal brand and profile externally and using this to co-ordinate activity and interventions by the BID and its partners. For example, what/who would be the target audience for this profile raising? Which aspects of Manor Royal’s business environment and property offer should form the key messages? How could partners best come together to agree and implement such a strategy, and how can existing resources be best utilised and maximised?
- 8.17 A practical element of this marketing strategy could involve re-visiting and examining Manor Royal’s web presence and considering ways in which the existing BID website could be improved to better showcase Manor Royal’s strengths and offer to external parties and potential business occupiers. For example, other competitor locations have a single website acting as a ‘one stop shop’ for information relating to the business park including information on latest property

availability and development opportunities, as well as clearer sign-posting of the amenities that exist on the site.

Planning Mechanisms

- 8.18 Taking into account the findings of section 7.0, the BID should work with the Borough Council to look at preparing a Local Development Order relating to various minor operational works and alterations within Manor Royal. This would reduce the time and costs for businesses and occupiers by removing the need to apply for full planning permission for minor works and alterations where they comply with the parameters of the LDO, which would be replaced with a pre-development notification form for consideration by the Council. The existing Local Plan policies (specifically Policy EC3) and statutory Design Guide would give a robust basis for this approach and importantly safeguard the requirements for high quality development and landscaping that have been established, and the provisions of any LDO would need to work within these.
- 8.19 In the first instance, it is recommended that the Local Planning Authority and Manor Royal BID work together to scope and explore how an LDO could come forward at Manor Royal, having regard to the scale, scope and range of its remit, and how use of this planning tool can be achieved in a manner that is consistent with wider aspirations for Manor Royal; any resulting LDO would need to be carefully worded to ensure that it is beneficial to the role and function of Manor Royal, including its overall planning and operation. It will ultimately be for the Council, working with Manor Royal BID, to scope the precise detail of what an LDO could include.
- 8.20 In the context of the adopted planning policies and design guidance that already apply at Manor Royal, it is considered that a detailed (as opposed to strategic) LDO could prove most beneficial by permitting minor operational development. The exact detail of what could be covered by any proposed LDO should be discussed and agreed by Crawley Borough Council and Manor Royal BID but could include (albeit not be limited to):
- minor extensions (subject to certain parameters and conditions to ensure such measures support, and do not undermine, the planning and operation of Manor Royal);
 - changes to external appearance of buildings, including recladding, alterations to doors and windows;
 - changes to access to buildings;
 - organisation of vehicle parking areas;
 - provision of cycle parking; and
 - provision of covered bin stores.
- 8.21 Looking further ahead, there is a need to consider how greater precision can be incorporated into planning policies for Manor Royal to proactively support the delivery of intensification and redevelopment on a more site-specific basis. As it stands, Local Plan Policy EC3 supports intensification opportunities across the entire Manor Royal area but there is also recognition that opportunities exist for some sites to be used more efficiently.
- 8.22 The analysis undertaken as part of this study suggests that significant potential exists to redevelop and intensify existing sites at Manor Royal to accommodate additional employment floorspace over the coming years but that the development potential of these sites may be constrained by factors such as surrounding land uses and building heights, proximity of existing development adjoining site boundaries and proximity to Gatwick Airport Safeguarded Land. This suggests there is scope for an additional level of micro-allocations at Manor Royal to encourage this intensification, supported by an appropriate evidence base.

8.23 This could be a matter for the forthcoming review of the Crawley Local Plan which it is understood will take place over the next few years. Subject to this, there is scope for the introduction of a business-led neighbourhood plan for Manor Royal. The advantage of this would be to define future changes for Manor Royal in a formal planning framework. This would need to be in accordance with the overarching Local Plan, but opportunities such as gateway improvements, new facilities and microsite allocations in the area covered by EC3 could all be formalised within a statutory planning framework.

8.24 The ability to redevelop sites across Manor Royal more efficiently and effectively in future will also depend to a large extent upon the provision of supporting infrastructure, for example transport and highway improvements, to 'keep up' with the pace and nature of development. The BID will therefore need to work closely with the Borough and County Council to secure funding opportunities (including through the recently announced £14.64 million Local Growth Fund investment) and ensure these are channelled to those sites within Manor Royal that face particular infrastructure challenges to enable intensification and (re)development to take place in future. The BID could also help to support and facilitate intensification through the ongoing promotion of site and development opportunities within Manor Royal, including through an enhanced web presence as noted above and through ongoing dialogue and communication with the BID business base.

Business Hub

8.25 The need for improved business facilities and staff amenities has been identified by previous assessments of Manor Royal, and as noted in section 5.0, the lack of a dedicated 'hub' places Manor Royal at some disadvantage compared to other major employment and business park sites. County Oak now acts as a sort of de facto amenities hub to the western side of the park; however, it is not really a business environment and the travelling distance from the eastern side of Manor Royal requires a car during a lunch break. Some other facilities are available within hotels (e.g. meeting room hire), but these are somewhat disjointed and not always conveniently located or clearly advertised. The Basepoint Centre completed in 2003 has provided much-needed flexible small business space but now has limited availability, and is located on the western edge of Manor Royal. Above all, a dedicated hub would contribute to reinforcing the Manor Royal brand as noted above, and ensure the district can compete effectively with both existing and emerging opportunities.

8.26 The BID should consider catalysing the development of a new business hub within Manor Royal, which combines flexible workspace and co-working facilities, as well as essential amenities such as a café/restaurant and convenience outlets, as well as potentially a cycle storage/hire facility and car club/electric vehicle charging points. To improve access to services on the eastern side of Manor Royal, a hub could be developed in a more central location that would also remove the need for occupiers to travel by car and lower traffic congestion at certain times of the day. Depending upon site location and characteristics, there could also be scope to develop a transport interchange as part of and to complement the business hub, providing a central, combined resource for transport sharing, charging and parking facilities.

8.27 In most other major employment or business parks, such facilities have tended to be master-planned at an early stage and/or delivered by a site developer, and in a small number of other cases have been brought forward by the private sector (mainly for retail-based schemes). In the case of Manor Royal, the delivery options are likely to comprise the following:

- A joint venture between the BID/Council and a private sector developer, perhaps as part of a wider scheme which can provide the land/floorspace and cross-subsidise the development cost. The BID could underwrite some of the running costs and/or directly lease space, but to

be commercially viable it would be important to secure an anchor tenant/operator. An element of public sector may still be required if there is a viability gap.

- A public sector-led initiative whereby the Council would acquire land and fund the capital cost of the facility, and partner with third party organisations for delivery of services (e.g. a managed workspace provider, franchises for café and retail units etc). This would require the support of the Council or Local Enterprise Partnership. The Bid and Council could form a joint management company.

8.28 For a dedicated new-build hub facility greater clarity on the potential location could, as noted above, be provided through a micro-site allocation planning approach. Alternatively, options may exist for a hub to be created on ground floor space retrofitted within existing building or to be provided as part of a vertical mixed-use building. These options would reduce the costs and risks involved, albeit some degree of cross-subsidy is still likely. The BID could relocate its offices to the hub as part of a centralised management/site information function, which would generate cost savings on existing office rental.

8.29 As noted in the Action Plan below, the recommended next step to progress the hub concept is to carry out a more detailed feasibility study to explore site options, delivery approaches (building on the above points), potential occupiers and operator models. This would also investigate the optimum size/scale of such a facility and this will be heavily influenced by the nature of activities and occupiers that take up and use space within the facility. To inform this, the feasibility study would also review successful hub type facilities that operate elsewhere across the UK (including those identified by the review set out in section 5.0) to identify critical success factors and learning points for Manor Royal that can be taken on board.

Investments in infrastructure

8.30 Evidence documents and consultations with stakeholders indicate that traffic congestion is a real issue at peak times in Manor Royal and that public transport (or at least perceptions of it) could be improved. The BID's Transport Strategy includes an action plan with costed options to help mitigate traffic congestion in the business district. The BID does not have the available resources to fully fund some of the more costly interventions. However, it can potentially act as catalysing agent in bringing forward funding from pots (e.g. Local Growth Fund) to enable the more expensive interventions.

8.31 The BID should consider continuing to provide its current maintenance and business support services. Existing business parks with similar characteristics to Manor Royal (e.g. Brackmills, Brooklands and Maylands) either provide similar services or do not, which represents a competitive advantage to the offer of Manor Royal for existing and potential occupiers.

8.32 Given the scope and range of issues associated with infrastructure to, from and within Manor Royal, a range of technical studies have been carried out over recent years on behalf of the BID including the Manor Royal green and grey infrastructure audits and transport study amongst others. These studies have investigated current challenges and potential interventions to improve the functioning of Manor Royal's infrastructure over the years to come. These interventions range from relatively straightforward improvement works to longer term, challenging projects and cover aspects such as roads, pavements, green space and public realm, all of which have a role to play in maintaining and enhancing the appeal and experience of Manor Royal as a leading business location. In the context of a finite pool of resources for funding and delivering such improvements, the BID will need to play an important role going forward by working with other public and private sector partners to ensure funding opportunities can be accessed for the most pressing and significant works.

Action Plan

- 8.33 Table 8.2 overleaf sets out a summary action plan, drawing on the overall recommendations set out above. Each action is defined in terms of:
- Rationale – purpose of the proposed action;
 - Agencies – broad ownership or responsibilities for taking actions forward;
 - Timeframe – ranked in terms of short/medium/long;
 - Resourcing implications – relating to the recommended action (as opposed to the end result), ranking in terms of high/medium/low; and
 - Scale of impact – the potential scale of economic impact that could be supported by the proposed action, ranked in terms of high/medium/low.
- 8.34 Some of these actions were highlighted as part of the 2010 Manor Royal Masterplan but are still considered to be relevant to the BID's overall programme of activity in light of more recent analysis and intelligence gathered through this EIS. They broadly correlate with the BID's existing operational plan and over-arching objectives emerging from the new Business Plan.

Table 8.2 Action Plan

Theme	Action/Rationale	Agencies	Timeframe	Resource Implications	Scale of Impact
Quality of place	Recent occupier surveys indicate that BID levy payers are seeking further action from the BID to improve the quality of the street scene and this is substantiated by technical evidence studies such as the green infrastructure audit. The BID should use this range of evidence to develop an implementation strategy which prioritises specific recommended interventions and investments to enhance Manor Royal’s quality of place and report back to levy payers on progress that has been made in this regard. This is also linked to the ‘infrastructure and facilities’ theme below.	Manor Royal BID, CBC and WSCC	S-M	L-M	M
Business support and engagement	<i>Business engagement and support forms an important part of the BID’s day-to-day role and remit, and the BID will need to monitor this strand of work and respond to specific opportunities, needs or gaps as and when they arise. Specific actions are summarised below.</i>				
	Carry out further engagement with Manor Royal’s business community to develop a more comprehensive and collective sense of ownership of Manor Royal. Using its networks and influence, the BID should more effectively connect occupiers to find shared solutions to commonly cited problems and issues, for example relating to provision of underutilised meeting space and car parking. This could involve setting up an online portal or information sharing website where business occupiers can sign up and post opportunities to share resources as and when opportunities arise.	Manor Royal BID	S-M	L-M	L-M
	Related to the above, the BID could play a more pro-active role in linking up companies trading at Manor Royal, providing opportunities to collaborate and trade with one another, building on the critical mass that exists to develop and foster supply chain linkages. This could be facilitated through development of an online portal, local procurement network and/or supplier development programme. Consultation could be undertaken with levy payers to investigate the most effective and/or popular delivery mechanism. This action could also be supported through development of a Business Hub at Manor Royal and the meeting space that this could provide (see specific action below).	Manor Royal BID	S-M	M	L-M
	Develop sector-specific strategies to support and enable Manor Royal’s key sectors to achieve their growth potential over the coming years. This could focus on protecting, nurturing and growing existing sectoral strengths within Manor Royal - supporting existing occupiers to grow, diversify and innovate - and retaining/attracting firms that can provide high quality, high skilled jobs within the Borough. Ideally any strategy should be developed in conjunction with CBC to ensure alignment as far as possible with existing activity carried out by its Economic Development team. The first step could involve consulting with a selection of key employers to ascertain their specific	Manor Royal BID, CBC and key public/private sector partners	M-L	M	M-H

Theme	Action/Rationale	Agencies	Timeframe	Resource Implications	Scale of Impact
	skills and workforce needs, and how these needs could be met. It could also focus on how they see these needs changing over the coming years.				
Brand positioning and promotion	<i>A key role of the BID is to promote Manor Royal Business District as a premier business destination to encourage investment and retain businesses, promote local businesses and trade and work positively with local stakeholders and partners to represent the interests of the business district at a strategic level. From a practical perspective, this should be divided into internal and external activity, considered below.</i>				
	INTERNAL Manor Royal business occupiers already understand the benefits of operating at the Business District, but there is scope to more effectively integrate Manor Royal with the rest of Crawley and publicise the availability of nearby facilities and amenities more positively to occupiers. This could include more effective wayfinding to link Manor Royal with Crawley town centre and raising awareness of its proximity to the town centre and Gatwick Airport through the good provision of public transport facilities that exist, but might not be widely known. These initiatives are relatively straightforward to implement but represent valuable and important ways of maintaining the Manor Royal brand and integrating the Manor Royal offer to maintain and enhance occupier appeal.	Manor Royal Crawley Growth Programme Partners and TCP	S	L-M	L
	INTERNAL As set out above, the BID should more effectively use its networks and influence to connect occupiers to find shared solutions to commonly cited problems and issues, for example relating to provision of underutilised meeting space and car parking. This will help to re-inforce and establish the Manor Royal brand internally by fostering a collective sense of ownership of the Business District. This could involve setting up an online portal or information sharing website where business occupiers can sign up and post opportunities to share resources as and when opportunities arise, co-ordinated and facilitated by the BID.	Manor Royal BID	S-M	M	L-M
EXTERNAL Significant scope remains to enhance the profile of Manor Royal as the South East's leading mixed use commercial centre and promote this message to an external audience outside of the Gatwick Diamond sub-region. This will become particularly important in the face of growing competition from established and emerging employment centres and business parks, to ensure that Manor Royal can continue to prosper over the coming years. The BID should consider developing a targeted and focused marketing strategy for promoting the Manor Royal brand and profile externally and using this to co-ordinate activity and interventions by the BID and its partners. This should set out who the target audience should be, what key messages should be communicated, and how the BID can work most effectively with its partners to implement the strategy over its next term. In particular, this could be used to help attract and retain high value businesses to Manor Royal, in turn helping to grow and	Manor Royal BID with key public/private partners	S-M	M-H	M-H	

Theme	Action/Rationale	Agencies	Timeframe	Resource Implications	Scale of Impact
	<p>diversify the business district’s knowledge based occupiers.</p> <p>EXTERNAL Related to the above strategy, there is scope to link this promotional activity and awareness raising with an enhanced Manor Royal web presence and it is recommended that the existing website is re-visited and examined to consider ways in which it could better showcase Manor Royal’s strengths and offer to external parties and potential business occupiers. This could include a ‘one stop shop’ for information relating to the business park including information on latest property availability and development opportunities, liaising closely with local property market agents and developers to keep this information up-to-date. An enhanced web presence could also provide a practical way for the BID and its partners to promote intensification and (re)development opportunities at Manor Royal, to help ensure that the scale of intensification identified by this study can be realised as far as possible over the coming years.</p>	Manor Royal BID in conjunction with local property agents and developers	S-M	M	M
Planning tools and mechanisms	<i>The EIS has identified scope to make more pro-active use of planning mechanisms to overcome existing barriers or hurdles to development and streamline the planning process to the benefit and appeal of business occupiers. Specific actions and potential next steps are set out below.</i>				
	The BID should work with the Borough Council to prepare a Local Development Order (LDO) relating to various minor operational works and alterations within Manor Royal. This would reduce the time and costs for businesses and occupiers by removing the need to apply for full planning permission for minor works and alterations where they comply with the parameters of the LDO. Initial work should focus on investigating the appropriate scope and parameters of the LDO, although some suggestions are included earlier in this Chapter.	Manor Royal BID and CBC	M	H	M
	Consideration should be given to how greater precision can be incorporated into planning policies for Manor Royal to support the delivery of intensification and redevelopment on a more site-specific basis. This could be a matter for the forthcoming review of the Crawley Local Plan and could include the introduction of a business-led neighbourhood plan for Manor Royal which would define future changes for Manor Royal in a formal planning framework.	Manor Royal BID and CBC	M-L	M-H	M
Business amenities	To respond to the identified need for improved business facilities and staff amenities at Manor Royal, existing proposals for a new Business Hub should be progressed to the next stage by undertaking a detailed consideration of potential delivery options, ideally through a feasibility study. This should consider scope for a joint venture between the BID/Council and a private sector developer, perhaps as part of a wider scheme, as well as through a public sector-led initiative whereby the Council would acquire land and fund the capital cost of the facility, and partner with third party organisations for delivery of services. It would also identify potential providers/occupiers of the Business	Manor Royal BID in conjunction with CBC, Coast to Capital LEP, and potential private sector	M-L	H	M-H

Theme	Action/Rationale	Agencies	Timeframe	Resource Implications	Scale of Impact
	Hub and consider potential locations (including scope for a dedicated new-build hub facility or re-use of an existing space).	developers			
Infrastructure and facilities	<i>Provision of appropriate infrastructure is a key issue for the continued economic prosperity of Manor Royal; whilst connectivity and accessibility to, from and within Manor Royal is generally good, the Business District suffers from congestion at key access points at peak times. Given the scope and range of issues associated with Manor Royal's infrastructure, a range of technical studies have been commissioned to identify potential interventions to improve the functioning of Manor Royal's infrastructure over the years to come. Some of the key actions considered most important within the scope of the EIS are summarised below.</i>				
	Take forward the various actions set out in the recent Manor Royal Transport Study and Action Plan, implementing those recommendations which focus on enhancements to Manor Royal's transport network. Some of these actions are being implemented through the Crawley Growth Programme after the £14.6m Local Growth Fund investment package was secured from the LEP for Crawley and Manor Royal. In light of funding and resource availability, a degree of prioritisation will be required to identify those interventions that can make the greatest difference and have the greatest benefit. This is already underway through development of a new Projects Pack which recommends a focus on completion of the Gateway projects identified in the previous Prospectus Package; and enhancing the walking and cycling infrastructure across Manor Royal through better integration between transport and public realm enhancements such as interpretation / way finding and public art projects.	WSSC, Manor Royal BID, CBC, Coast to Capital LEP	S-M	M-H	M-H
	Continue to promote the provision and enhancement of public open space across Manor Royal, identifying and directing investment to those projects and initiatives most likely to help further improve the health and wellbeing of the business community. Again, technical evidence has recently been prepared through the green infrastructure audit and the emerging Projects Pack prioritises a series of new public parks across the Business District.	Manor Royal BID with CBC, WSSC and landowners	S-M	M	L-M
	The recent grey infrastructure audit identifies areas across Manor Royal's existing network that will require upgrades to meet an appropriate level of standard. A series of initiatives have been identified through the new Projects Pack to enhance the condition of roads and footpaths across Manor Royal, and the BID will need to work closely with its partners (most notably West Sussex County Council) to direct funding and investment to those areas of Manor Royal's existing grey infrastructure most in need of improvement.	Manor Royal BID, CBC, WSSC	S-M	M-H	M

Source: Lichfields

- 8.35 The action plan outlined above is not intended to provide an exhaustive list of next steps and actions for the BID and its partners, but identifies those actions that are considered to represent priorities, based on the various evidence collected and reviewed as part of this study.
- 8.36 The actions should form a key focus for joint working between the BID and partners such as Crawley Borough Council, West Sussex County Council and Business Partner Organisations in order to ensure that Manor Royal is best-placed to continue to grow and remain competitive in future. Collective action and partnership working – using the suggested action points and strategy for change - are needed to build on Manor Royal’s existing brand, and strengthen its economic role within the wider Gatwick Diamond area and beyond. Key to all work is building on existing strong partnership and foundations.
- 8.37 It is also important to note the varying timescales associated with the action points outlined in the table above, some of which represent longer term initiatives that may take a number of years to achieve. Shorter term actions can emerge while work on longer-term actions (such as changes to planning policy) is progressed and it is recommended that the action plan is reviewed and updated at regular intervals.

Appendix 1: Study Consultees

Individual Consultees

Suzanne Holloway, Vail Williams
Michael Deacon-Jackson, FTD Johns
Tim Hardwicke, Stiles Harold Williams
Stephen Oliver, Vail Williams
Kirsten Trussell, Coast 2 Capital Local Enterprise Partnership
Clem Smith, Crawley Borough Council
Daryl Gayler, Natwest / Coast to Capital LEP

Workshop Consultees

Eddie Finch, Auditel
Zoe Wright, B & CE Benefit Schemes
Keith Pordum, Bon Appetit
Anthony Maynard, CGG
Julie Kapsalis, Chichester College Group
Anthony Masson, Crawley Borough Council
Lise Sorensen, Crawley Borough Council
Peter Smith, Crawley Borough Council
Nicola Blake, Creative Funding Solutions
Ann Swain, FSB
Alison Addy, Gatwick Airport Limited
Sally Brown, Gatwick Diamond Business
Rosemary French, Gatwick Diamond Initiative
Ken Boyle, KBA
Paul Roe, Kreston Reeves / Crawley and Gatwick Chamber of Commerce
Chris Maidment, LEAG
Lucie Bailey, Lichfields
Ciaran Gunne-Jones, Lichfields
James Tindale, Lichfields
Steve Sawyer, Manor Royal BID
Sam Murray, Manor Royal BID
Mark Curtis, Split Image Limited
Laura Miles, Stiles Harold Williams
Steve Pullen, Varian Medical Systems
Duncan Barratt, West Sussex County Council
Marie Ovenden, West Sussex County Council
Kathleen Wolton, West Sussex County Council

Appendix 2: Stakeholder Feedback Summary

A summary of feedback obtained through a series of consultations with Manor Royal stakeholders is provided below, broadly grouped under key discussion questions and topics. A full list of consultees is included at Appendix 1 above.

What makes Manor Royal attractive to businesses and staff?

- Location = key advantage. Proximity to the motorway network, Gatwick airport, accessibility by road and rail
- Public transport links are good and a real plus for the local workforce.
- MR ‘shiny and glossy’ with some big name occupiers/anchor tenants which gives a good impression for the businesses based alongside or behind then within the business district
- Part of the attraction is the mix and opportunity for large and small businesses to be based alongside each other
- It’s better looking than it was and there are more businesses here, plus there are many positive signs of confidence shown by the amount of investment, development and new buildings.
- Availability of highly paid, skilled work - staff here can expect better rates of pay than in some other areas
- Diversity of the property offer and quality of stock compared to nearby surrounding areas
- The Manor Royal BID itself is a huge strength and has been a very positive force. It has given businesses a collective voice, better-enabling funding sources to be tapped into, and has helped bring about improvements to the district. Key projects that received praise include:
 - i Manor Royal branding has helped create an identity
 - ii Wayfinding project has made it easier to find the destination you want to get to.
 - iii Number plate recognition has shown positive results in dealing with crime.
 - iv New Manor Royal Rangers to help address issues and ensure the smooth running of the business district.
- The presence of Gatwick Airport seen as a real plus. Whilst there has in the past been some negative perceptions that Manor Royal is overly reliant on the airport, there is now greater recognition that it is a natural by-product of the airport that airport-related industries locate in Manor Royal, and this is a positive that should be embraced.

Does it need to improve to stand out from the competition (existing and future competitors)?

- Not immediately, but there will be future competition from new development sites in e.g. Horley and Horsham
- Opportunity for more and wider engagement, so that MR does not become an island - MR in danger of isolation from rest of town
- Scope/Opportunity to promote MR wider in region, nationally and internationally - could be better at more pro-active comms/marketing strategy for media, profile and PR etc

- Manor Royal is “undersold” – at least outside of the Gatwick Diamond to a wider audience – links to inward investment and external promotion
- MR is actually not a formalised place e.g not an address, not consistently used by business and lack of wider awareness
- Mixed feeling about competition from new and emerging places. A feeling from some that there was no concern or feeling of threat or competition as Manor Royal would be offering something different from the other places
- Manor Royal should not be complacent. Attention needed to be given to public realm improvements, providing better facilities, aspects of improvement that encourage and support staff well-being etc or else we might find it increasingly difficult to retain businesses
- Connectivity was mentioned in terms of a western relief road to improve accessibility from the west
- Strategic Gap itself was mentioned as a constraint affecting development. If land in this area could be released this would help.
- Speed at which local public partners respond to opportunities to invest. If CBC/WSCC could gain some land/property control (like Surrey and other Councils have) this would provide more opportunity for the public sector to be a proper partner in bringing forward things like the hub (see below).
- Facilities/business hub: A feeling that staff demand more from the places they work in terms of facilities, a sense of community and opportunities to socialise. MR is weak in this area and a central hub would help but the sense of community and supporting staff well-being goes further than that.
- County Oak satisfies this ‘hub’ role to an extent, and there has been joint working between businesses, e.g. shared use of conference facilities, that has helped to address some of the issues arising from the lack of a business hub. It was noted that perhaps more could be made of this through a ‘meeting room sharing’ page on the BID website.
- Hub facilities have not come forward, need to establish who and how it can be delivered, explore partnership/joint venture opportunities – ‘if you want it join in’
- Linked to the above there was only so many businesses themselves could do to help with this and some businesses were either too small or could not afford to provide the facilities staff need onsite – so was a barrier to attracting staff/staff satisfaction.
- Requirements including childcare/nursery provision, gyms, better food offer, a “funkier” food offer e.g. street food
- Paths and pavements needed improvement. The poor state of them in parts of Manor Royal discouraged healthy lifestyles, sustainable travel e.g. walking and generally let the place down. As well as making the place unattractive it undermined wider efforts to encourage people to walk and cycle.
- Skills is a key issue, not just within Crawley, but across the Gatwick Diamond. There is a need for businesses to be clearer about the skills that are needed; rather than asking what is in the college prospectus, they need to be engaging with the colleges and universities to ensure that the courses they need are available to students.
- Childcare is a key issue, particularly for staff retention through enabling parents to return to work. There is a need for childcare facilities within the business district, and the BID and partners have a role to play in helping to bring this forward. This could be located as part of a central business hub, but the key is to ensure there is available provision in the business district.

- Improving the feel and appearance of Manor Royal remains a focus going forward.
- Traffic congestion and parking remain a key issue. There are still clear ‘pinch points’ at key times. Key areas of discussion were:
 - v It was noted that the public transport is excellent, and there needs to be clearer incentives for staff to use public transport as a means of accessing the business district. This included a suggestion to provide fewer parking spaces when a new premises is built – ‘if you cannot get a space, you are less likely to drive to work’.
 - vi Flexible working hours can make a big difference. Some companies give flexibility to work outside of the standard ‘9 to 5’ working hours, meaning that they are able to arrive at work outside of peak times. Agile working/working from home may also have a role to play.
 - vii Suggested that a traffic study should be commissioned to identify steps to address congestion and lack of parking.
 - viii Car sharing can play a role in helping to alleviate traffic. Need to add a ‘car share’ page to the Manor Royal BID website, enabling people to utilise a forum to arrange shared travel to work.
- Noted that whilst the Manor Royal BID is a real strength, it is largely representative of business leaders, and there is a need for the wider workforce to be able to say what they need and to provide feedback to the BID. Suggested that more networking and social events may help. It was also noted that many BID eligible companies do not actively engage with the BID, meaning that these companies are not making clear the changes that they want to see happen.

What sort of place should Manor Royal aspire to be over the next five years, and beyond?

- What type of jobs and job density do we want in Manor Royal, do you simply respond to demand or should it be a more managed approach?
- What is the right balance/trade-off between full occupancy and what type or the right type of occupancy?
- Do you need to be more precious about the space that you have and how many and what type of jobs are created
- Can use planning tools, but how long are you willing to hold off / allow space to be fallow in order to get the right development
- What incentives are needed, if any?
- Challenges of introducing different/new employment uses such as leisure, schools, health and retail, what is approved and acceptable in planning terms
- What should be acceptable in planning terms, is it going for the high-value business uses?
- Key constraint is the land and boundaries, so should it be more restricted as to what is acceptable, should it be more coordinated and formalised or do you leave it full and flexible over non-flexible with fallow periods
- Mixed view on the balance of warehousing v office: one view suggested there should be a re-balancing towards industrial to provide more industrial space in response to market signals. The alternate view as the balance between office and industrial was about right as it is to accommodate different demands as they change and provide a decent mix.
- Retaining diversity of mix in terms of type and quality was felt to be important.

- Caution over “gentrification” of Manor Royal: primarily this concerned an appetite to see older less attractive buildings re-developed to provide better quality more expensive buildings. The lower quality buildings are actually in good use and a more costly high-quality building may have the effect of out-pricing smaller businesses.
- An environment that supports staff well-being: ideas around trim-trails, walking and running trails, animating the available space, more places for staff, street food offer and an overall better/stronger sense of community.
- B8 storage & distribution/warehousing is increasingly in demand and is proving very attractive to the market. This sector could be a real strength for Manor Royal moving forward, particularly given the decline in the office market, and there may be a case for a greater focus on delivering/promoting Manor Royal as a B8 destination.
- But - The counterpoint was raised that there is a need for a mixed offer and a good range of premises. Whilst the market may be down on offices at the moment, this could change over time. Manor Royal must be flexible to be able to adapt to future trends, and a mix of premises will be important moving forward.
- We want people to recognise Manor Royal as an aspirational place – The BID has been a catalyst to achieving improvements so far, and will continue to be moving forward.
- Discussion about whether more should be made of the ‘Gatwick’ location in branding. Many businesses refer to Manor Royal as the ‘Gatwick Office’. But recognised that Manor Royal is a part of Crawley.
- Noted that there is a need to get the brand right: ‘Don’t promote the brand until we’ve got it right – get the brand right and then promote it’!
- Discussion on encouraging businesses to work together on a supplier/client basis, e.g. one company may be able to provide another with cheaper power, whilst it is able to offer discounted products by way of return. Essentially, seeking to encourage Manor Royal businesses to trade and work with other Manor Royal businesses to achieve mutual benefits.

How could this vision be realised by the BID and other partners?

- External businesses interested in joining in with MR community, but need to (re)consider what the BID is all about and its role
- Improve flow of logistics and operation rather than information sharing
- Complementary businesses could be ‘invited in’, but what would the offer be?
- Marketing, open up don’t be a closed community show what is there wider
- More confidence and appetite to showcase MR more widely, with partners
- Does BID need new strategy for PR and evaluate purpose and partnerships, but at same time need to focus
- What if the BID wasn’t there, what would happen, what would we be left with and who’s role would it be to look over MR
- MR shouldn’t be an island, who knows about it outside of MR?
- Highlight the close transport hub connectivity points (map the spider) to bring them visually closer
- Raise awareness and change behaviour, making the key transport hubs seem closer

- Could CBC play a more positive in terms of planning – for example by identifying a site or sites for the hub with prior consent for that kind of development.
- CBC and partners to be more proactive on investing in sites and be prepared to be motivated by wider objectives other than purely financial to help provide gap/pump priming funding for the hub where the return will be slow or require subsidy
- To persuade/enter into more positive discussions with Principal Park to look at ways to provide the hub on residual land on that site to include the opening up and public access to adjoining Magpie Wood.
- Consideration of JVs / Joint Ventures to secure funding to allow infrastructure and facility improvements to come forward.
- Crowdfunding and sponsorship opportunities.
- The BID is the driver to forming partnerships. It has brought together Manor Royal businesses to give them a collective voice. This has helped to unlock funding and has helped deliver key projects and improved working with other organisations.
- The consensus that there are already well-established and positive working relationships between the BID and other partner organisations such as Chichester College Group, Crawley Borough Council, Mid Sussex District Council, Coast to Capital LEP, Gatwick Diamond Initiative and West Sussex County Council.
- We are doing well, but there is more to be done and stronger links are needed.
- There is a need to make more of Manor Royal's links with Gatwick Airport.
- Still more work to be done to work with partners and deliver improvements to infrastructure and the aesthetic environment.
- Need to future-proof strategies for skills, what is the need, what are businesses looking for - can more be done to match employer needs
- Highlight what rest of town has to offer to MR and vice versa
- The workforce is very local and skills remains an issue and higher paid roles tend to be filled by in-commuting.

Appendix 3: GVA and Tax Data Tables

Table A3-1 Manor Royal Economic Output by Sector (2016)

Sector	Direct GVA	Indirect GVA	Total GVA
Accommodation and Food	£18,600,000	£10,400,000	£29,100,000
Admin and Support Services	£111,000,000	£48,800,000	£159,800,000
Agriculture, Forestry and Fishing	-	-	-
Construction	£24,500,000	£10,800,000	£35,300,000
Education	£20,000,000	£8,800,000	£28,900,000
Extraction and Mining	-	-	-
Finance and Insurance	£37,800,000	£16,600,000	£54,400,000
Health and Social Care	£2,900,000	£1,300,000	£4,100,000
Information and Communication	£112,200,000	£49,400,000	£161,600,000
Manufacturing	£336,500,000	£148,100,000	£484,600,000
Other Private Services	£2,400,000	£1,100,000	£3,500,000
Professional Services	£128,600,000	£56,600,000	£185,200,000
Public Admin and Defence	£3,200,000	£1,400,000	£4,600,000
Recreation	£3,000,000	£1,700,000	£4,600,000
Retail	£45,300,000	£17,200,000	£62,500,000
Utilities	£23,800,000	£10,500,000	£34,200,000
Wholesale and Transport	£360,800,000	£158,800,000	£519,600,000
Total	£1,230,700,000	£541,400,000	£1,772,100,000

Source: Experian (2017) / Lichfields

Note figures may not sum due to rounding

Table A3-2 Manor Royal Economic Output by Zone (2016)

Manor Royal Zone	Direct GVA	Indirect GVA	Total GVA
One	£172,500,000	£75,900,000	£248,400,000
Two	£542,300,000	£238,600,000	£780,900,000
Three	£190,100,000	£83,700,000	£273,800,000
Four	£116,700,000	£51,200,000	£167,900,000
Five	£209,100,000	£92,200,000	£301,300,000
Total	£1,230,700,000	£541,600,000	£1,772,300,000

Source: Experian (2017) / Lichfields

Note figures may not sum due to rounding

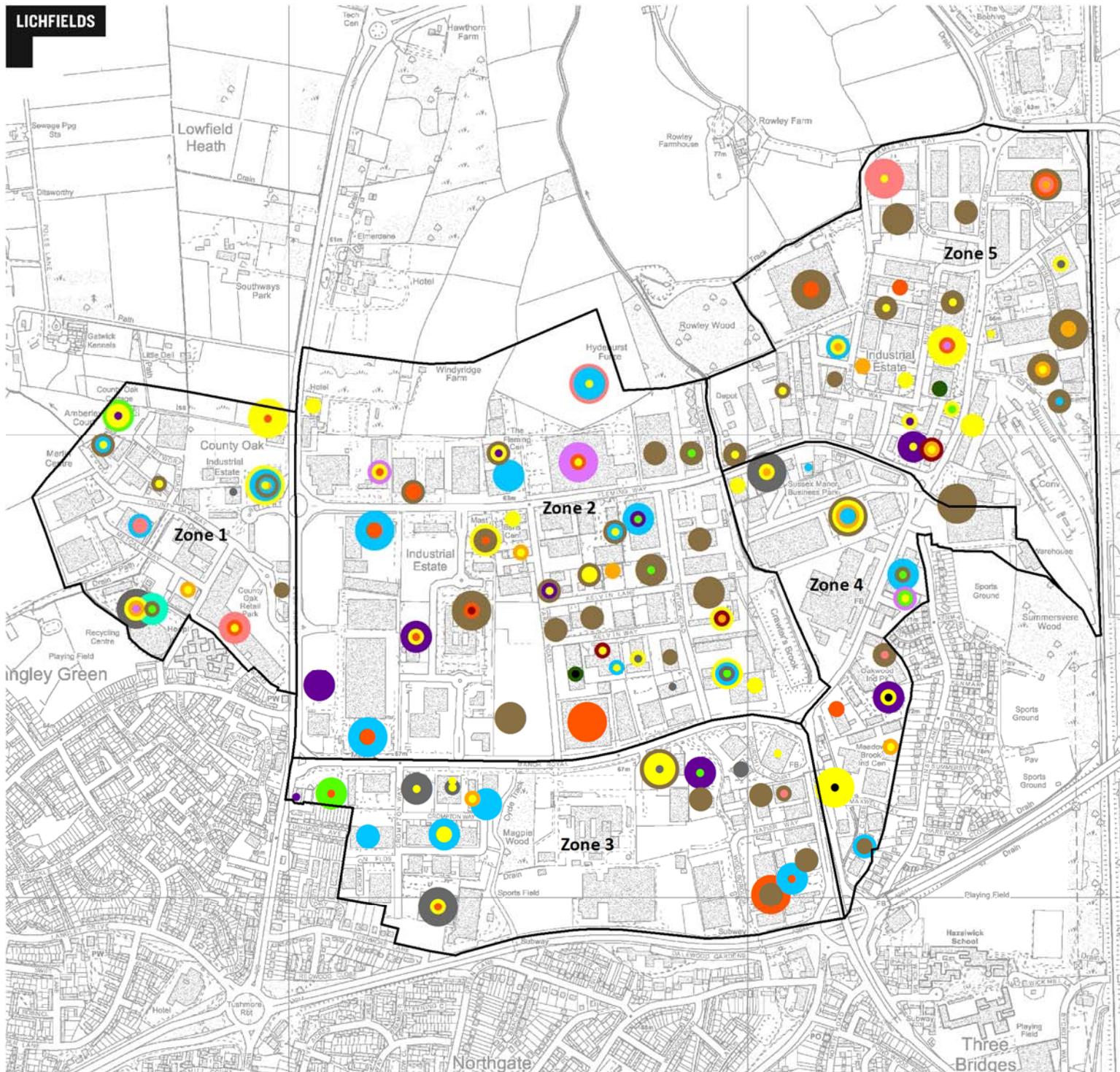
Table A3-3 Manor Royal Taxes by Sector

Sector	Income Tax	Worker National Insurance	Employer National Insurance	Total Tax
Accommodation and Food	£210,000	£490,000	£570,000	£1,270,000
Admin and Support Services	£4,740,000	£4,180,000	£4,810,000	£13,730,000
Agriculture, Forestry and Fishing	£0	£0	£0	£0
Construction	£1,830,000	£1,300,000	£1,490,000	£4,620,000
Education	£1,440,000	£1,130,000	£1,290,000	£3,860,000
Extraction and Mining	£0	£0	£0	£0
Finance and Insurance	£1,260,000	£910,000	£1,040,000	£3,210,000
Health and Social Care	£190,000	£160,000	£180,000	£530,000
Information and Communication	£7,900,000	£5,290,000	£6,090,000	£19,280,000
Manufacturing	£19,540,000	£13,660,000	£15,710,000	£48,910,000
Other Private Services	£90,000	£70,000	£80,000	£240,000
Professional Services	£4,140,000	£3,020,000	£3,470,000	£10,630,000
Public Admin and Defence	£210,000	£150,000	£170,000	£530,000
Recreation	£70,000	£90,000	£100,000	£260,000
Retail	£780,000	£1,000,000	£1,150,000	£2,930,000
Utilities	£940,000	£650,000	£740,000	£2,330,000
Wholesale and Transport	£23,630,000	£17,020,000	£19,570,000	£60,220,000
Total	£66,990,000	£49,110,000	£56,480,000	£172,580,000

Source: Lichfields

Note figures may not sum due to rounding

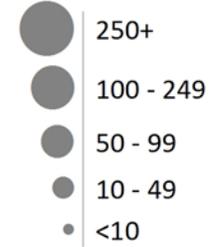
Appendix 4: Employment Mapping



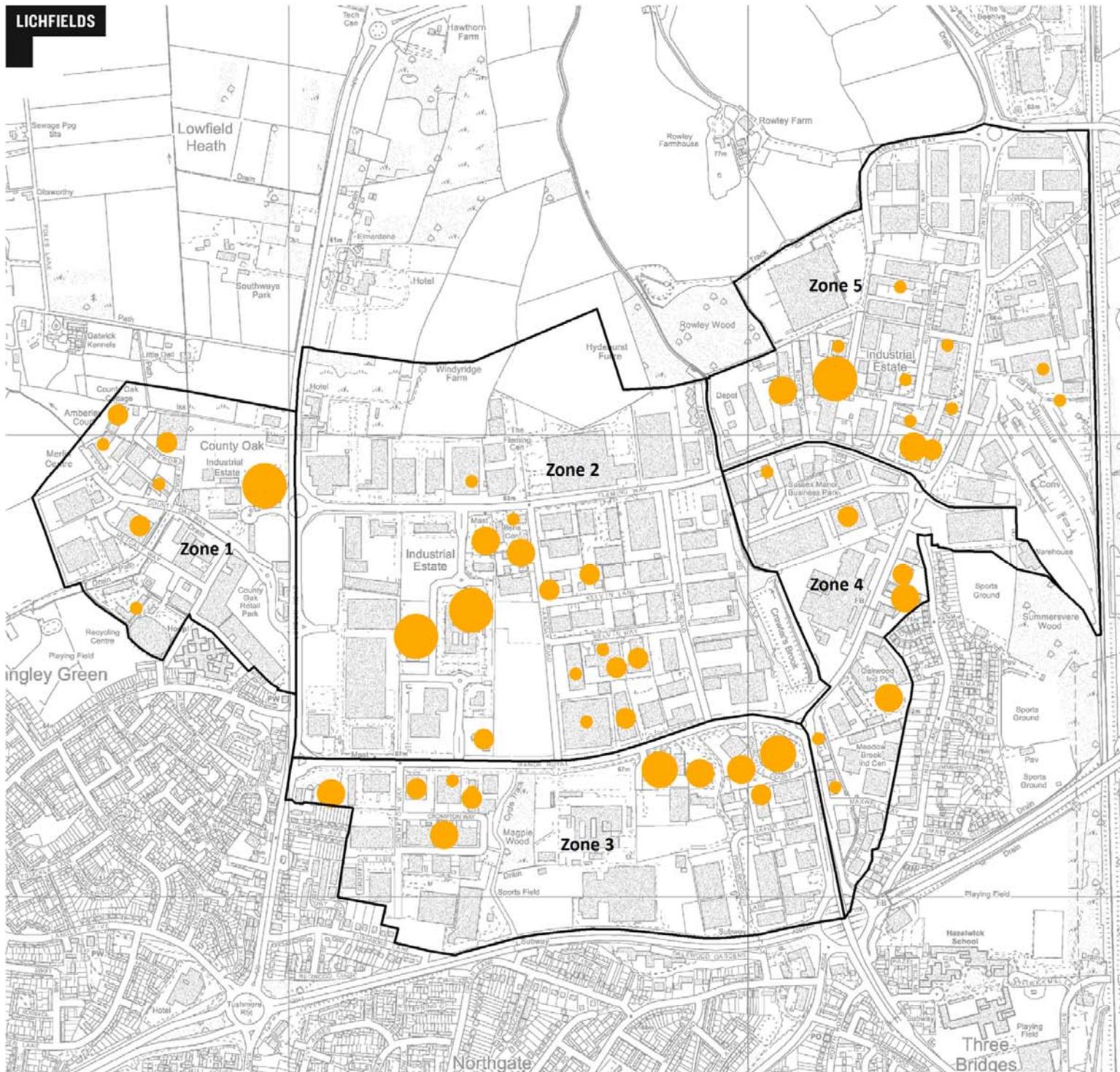
Sector:



Total Employment (by Postcode):



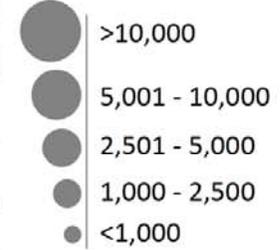
Appendix 5: Floorspace Mapping

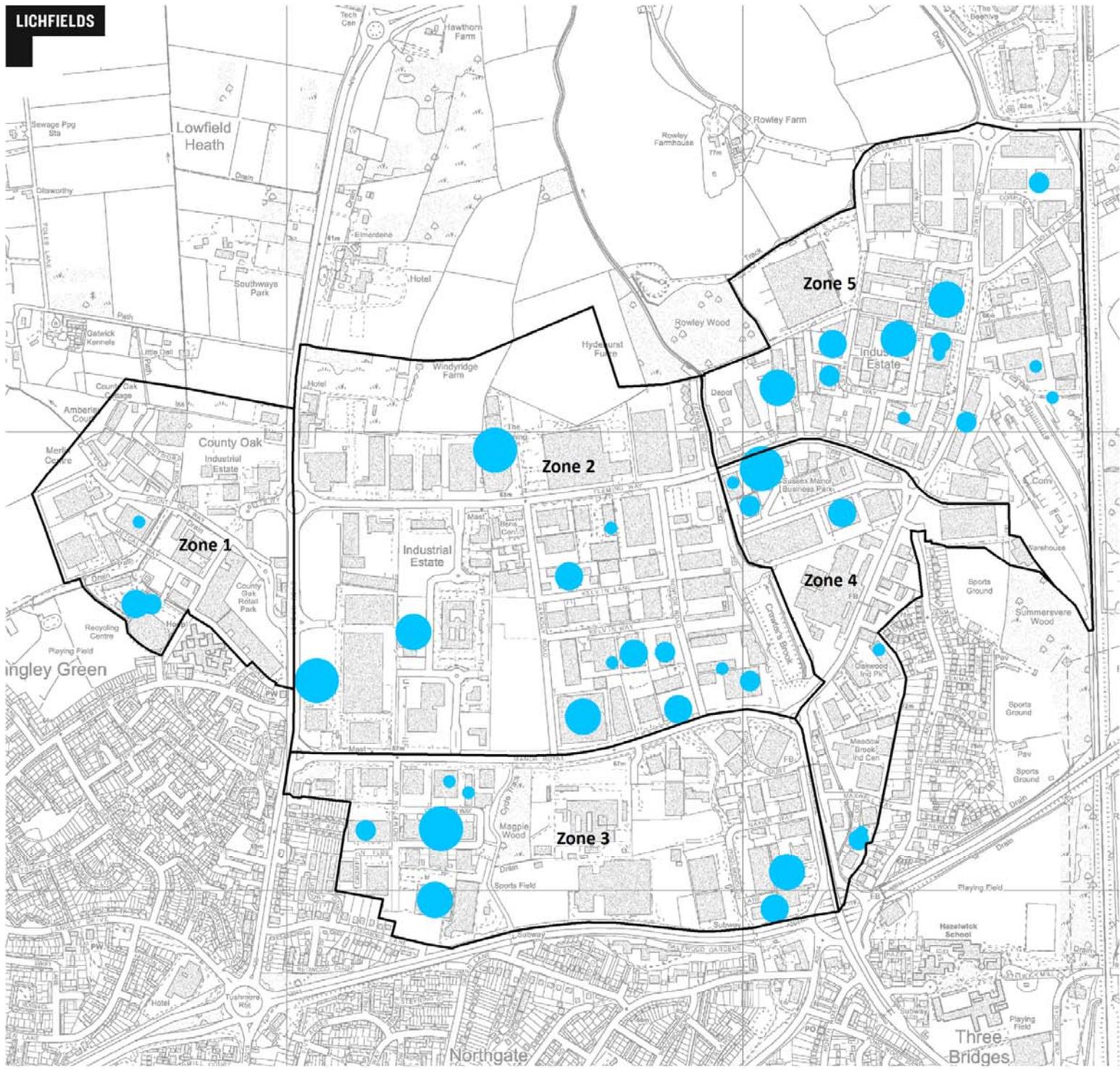


Land Use:

B1a/B1b

Total Floorspace sq.m
(by Postcode):

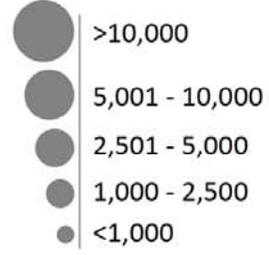


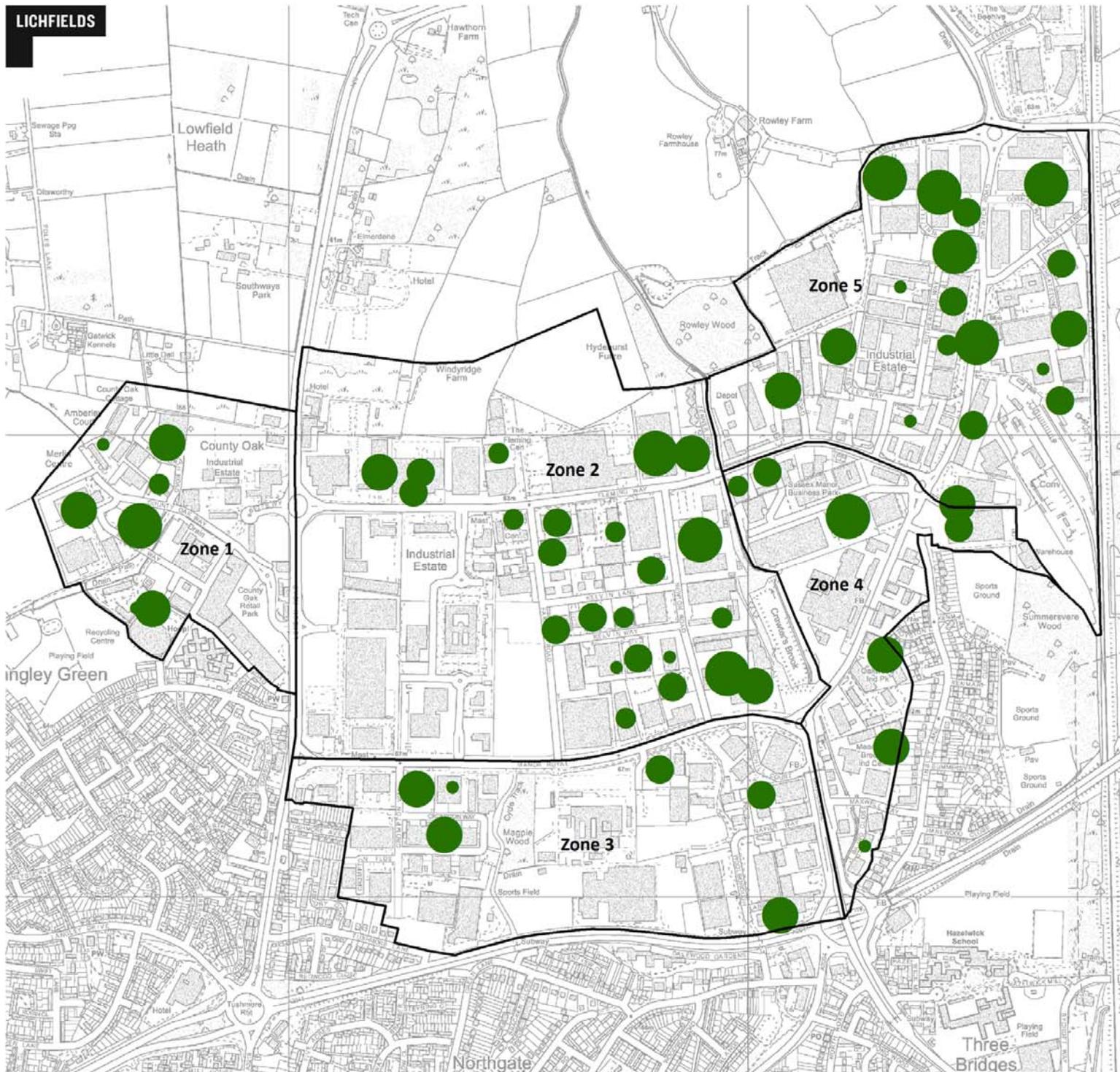


Land Use:

B1c/B2

Total Floorspace sq.m (by Postcode):

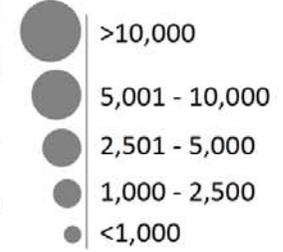




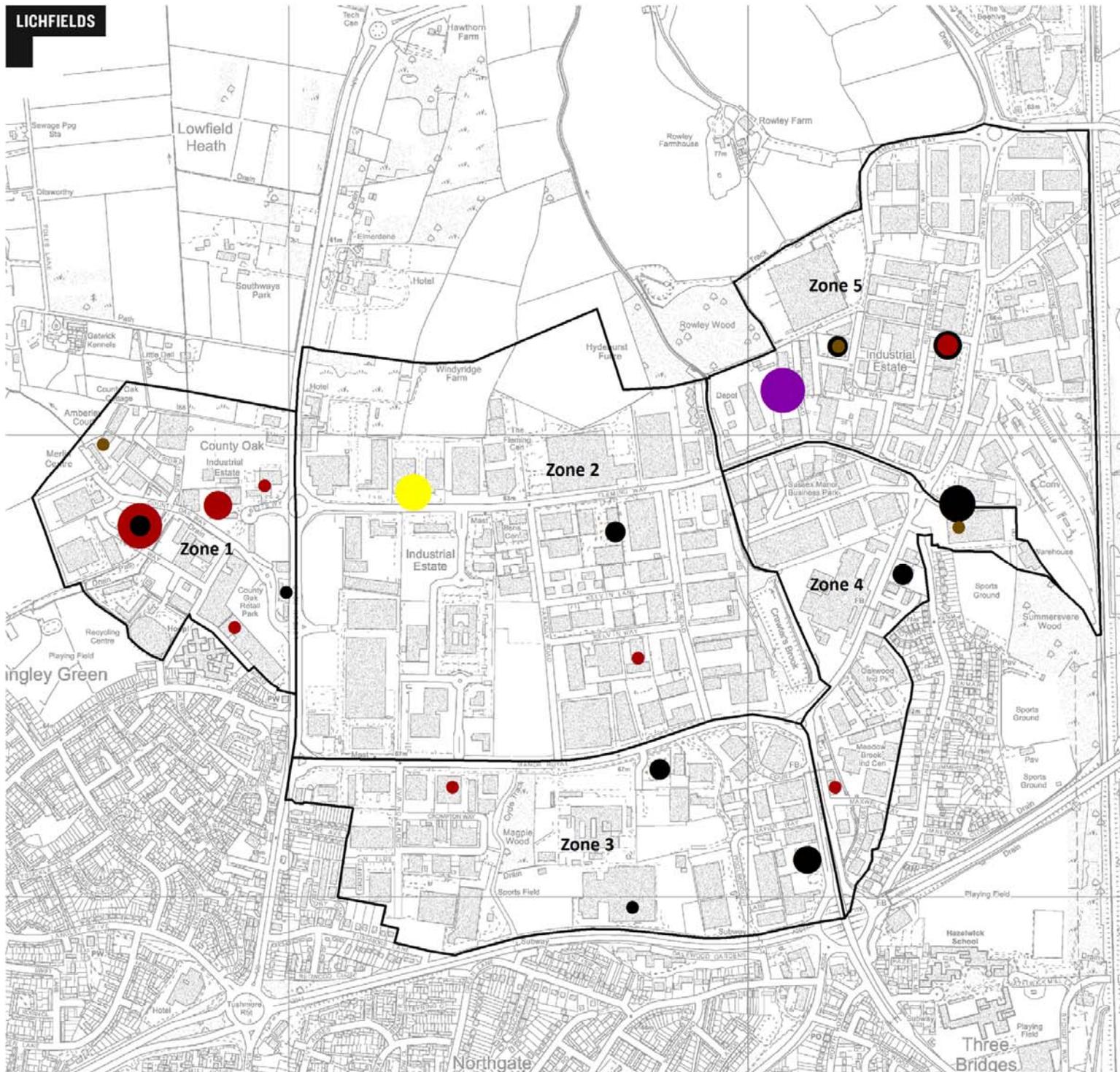
Land Use:

B8

Total Floorspace sq.m
(by Postcode):



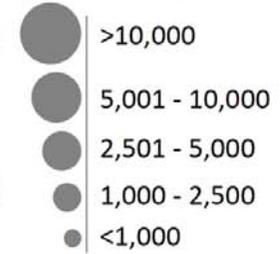
LICHFIELDS



Land Use:



Total Floorspace sq.m (by Postcode):



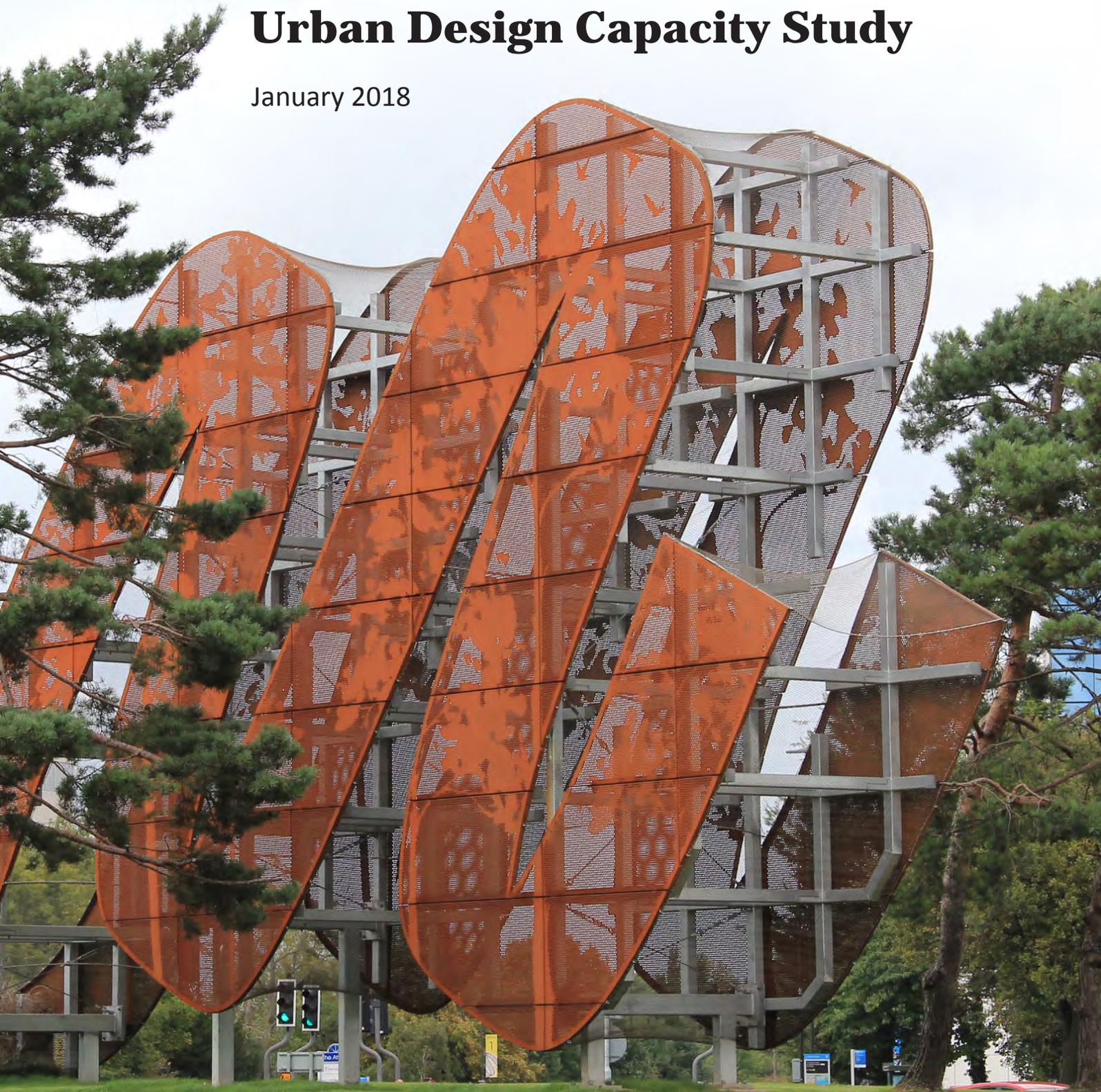
Appendix 6: Intensification and Redevelopment Opportunities

LICHFIELDS

Manor Royal

Urban Design Capacity Study

January 2018



Section 1: Introduction

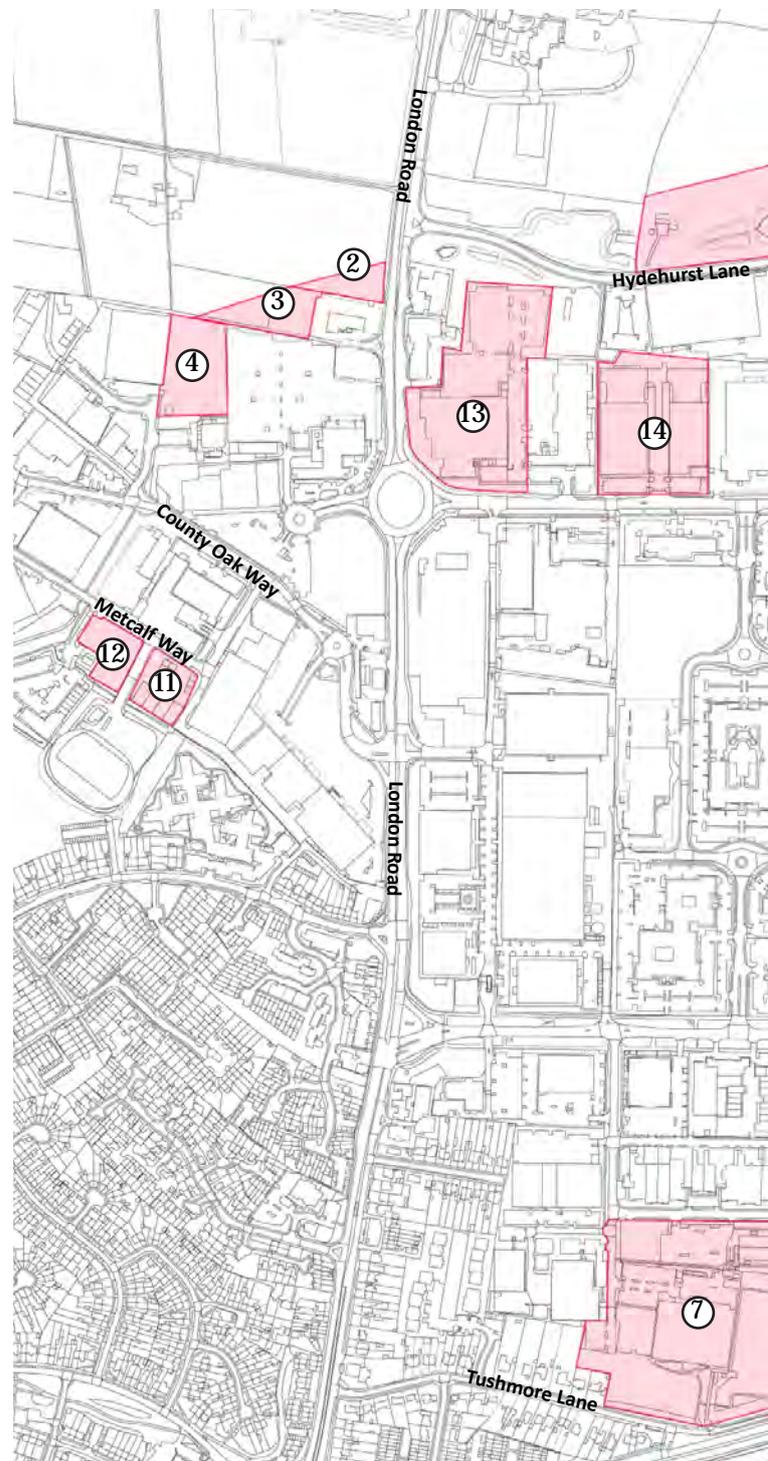
Introduction

This Urban Design Capacity Study provides an assessment of the development potential of a number of Opportunity Sites, within the Manor Royal area, as identified by MRBD Limited and Crawley Borough Council (CBC).

The project brief was to assess the potential of each of the 16 Opportunity Sites (as shown right), for office or industrial development. These sites have been chosen for the purposes of testing the principle for developing them more intensively should the opportunity arise, for which there may not be the necessary land/property owner or occupier appetite. It is not the intention of this study to dictate how these sites should be developed, merely to test the theoretical potential for doing so more intensively. The study assesses the potential intensification capacity of sites with apparent surplus space and potential full redevelopment capacity of all sites. This sample of sites does not reflect the overall development capacity of Manor Royal and other intensification/redevelopment opportunities may become available in the future.

This study contains the following sections:

- Section 2: Methodology - outlines the methodology used to identify the potential development capacity of each of the Opportunity Sites;
- Section 3: Baseline Study - identifies average or typical and highest quantum of development within recent Manor Royal schemes (as provided by CBC);
- Section 4: Potential Capacity for Further Development - identifies the Opportunity Sites with existing surplus areas which may potentially accommodate additional development; and
- Section 5: Potential Redevelopment/Development Capacity - identifies potential redevelopment/development capacity of the Opportunity Sites.



Location of Manor Royal Opportunity Sites



Section 2: Methodology

A three stage process was undertaken in order to identify the potential development capacity of each of the Opportunity Sites:

Stage 1: Baseline Study

A baseline study of recent office and industrial schemes (approved in/post 2014), within Manor Royal, as identified by CBC and MRBD Limited was undertaken.

These were:

Office Developments

1. Leonardo, Crawley Business Quarter
2. Nexus, Gatwick Road
3. Elekta Cornerstone, Manor Royal

Industrial Developments

1. 5 Rutherford Way
2. Land at Jersey Farm
3. Space Gatwick, Faraday Road
4. Principal Park (Phases 1 and 2)

The study identified, from documents submitted as part of the planning applications (available from the CBC's website), the average and highest built site coverage for each office and industrial development.

The baseline study, used to inform the potential development capacity of the Opportunity Sites is at Section 3.

Stage 2: Potential Capacity for Further Development and Potential Redevelopment/Development Capacity

At this stage, the capacity has been informed by a site visit and the examples of development provided. The potential development capacity of/within the Opportunity Sites will need to be verified in detail, considering such matters as for example: planning policy and guidance, highway capacity and access, site conditions, features and services, operational needs/requirements and future expectations of existing and future users.

Potential Capacity for Further Development

A desktop appraisal based upon aerial maps (Source: Google, 2013) and a site visit (September 2017) was undertaken to identify any areas of apparent potential surplus space within the Opportunity Sites. The potential development capacity of each of these surplus areas was then calculated.

Potential Redevelopment/Development of Opportunity Sites

Full redevelopment of each of the Opportunity Sites (assuming full clearance) currently in employment use and development of the vacant Opportunity Sites has been considered as part of this study.

Stage 3: Calculating the Potential Development Capacity of Sites

Potential Nature of Development

The potential nature of development (i.e. office or industrial use) was informed by the existing uses/predominant uses within the site and the surrounding area; and the Character Areas as defined within the Manor Royal Design Guide Supplementary Planning Document (MRDG SPD) (2013).

Potential Building Footprint and GEA Floorspace

The average and highest building footprint to site ratio (%) and GEA floorspace to site ratio (%) for each of the example office and industrial developments was used to calculate a potential building footprint and GEA floorspace for each of the Opportunity Sites. For this exercise there is considered no constraint on achieving a similar height of development.

Building Height

An indication of the potential height of development is informed by the MRDG SPD (2013), the site visit and the example developments. The potential height does not necessarily indicate that such a development would be acceptable. For some of the Opportunity Sites there may be potential for a taller building than the example developments, and for other sites the surrounding context may suggest a lower building will be more appropriate. Further constraints analysis would be required to identify and assess the visual impact of future development proposals on the surrounding area.

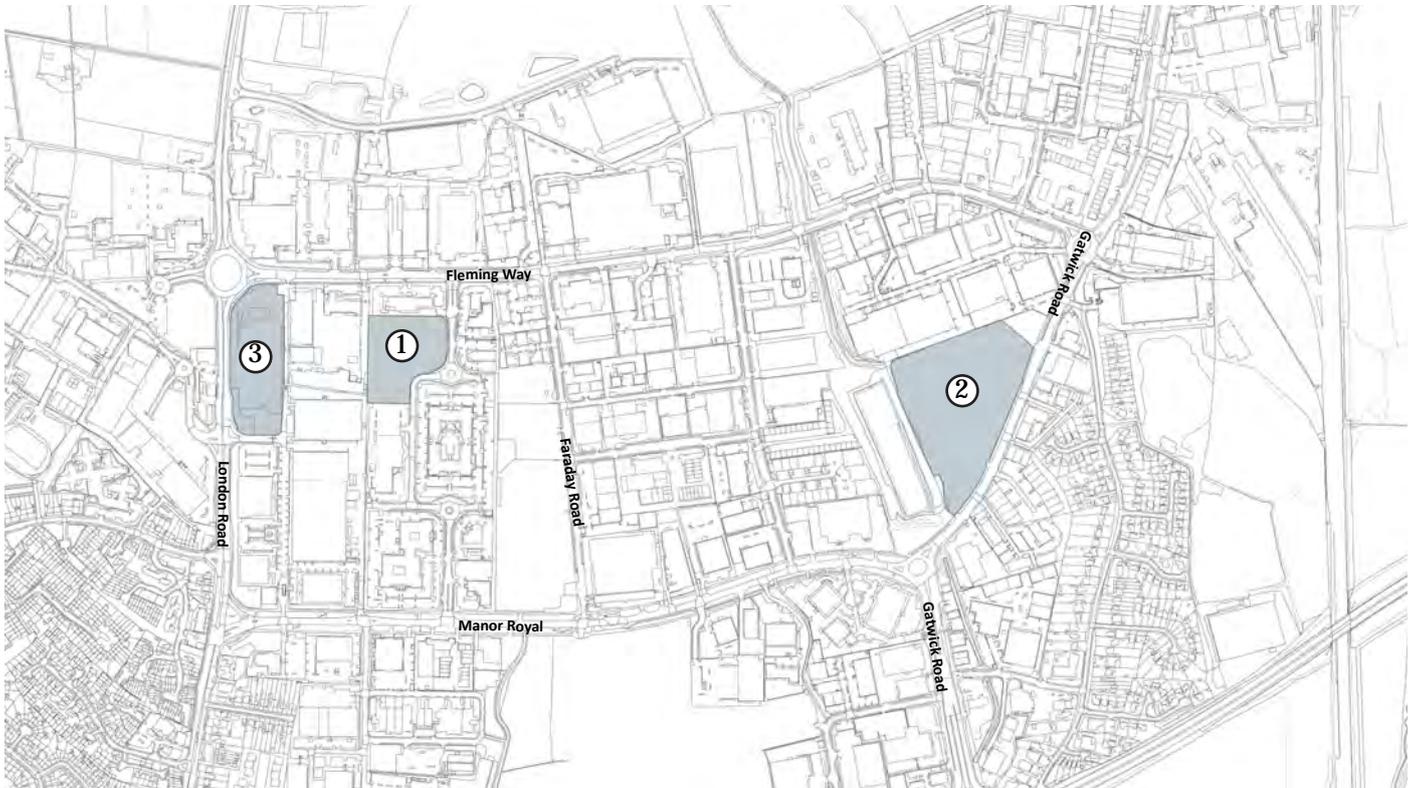
Heights are referenced to office scale floor to ceiling height (assumed at 2.5 - 3m from the site visit) and industrial heights the equivalent thereof (i.e. a single storey industrial unit with mezzanine office space could be equivalent in height to a 3-4 storey office building).

Potential Ancillary Area

For the purposes of this study, the remainder of the site (i.e. the area not occupied by the building footprint) has been assumed to be sufficient to accommodate parking and servicing areas for the development.

Section 3: Baseline Study

Manor Royal Example Office Developments



Location of Manor Royal Example Office Developments



1. Leonardo, Crawley Business Centre



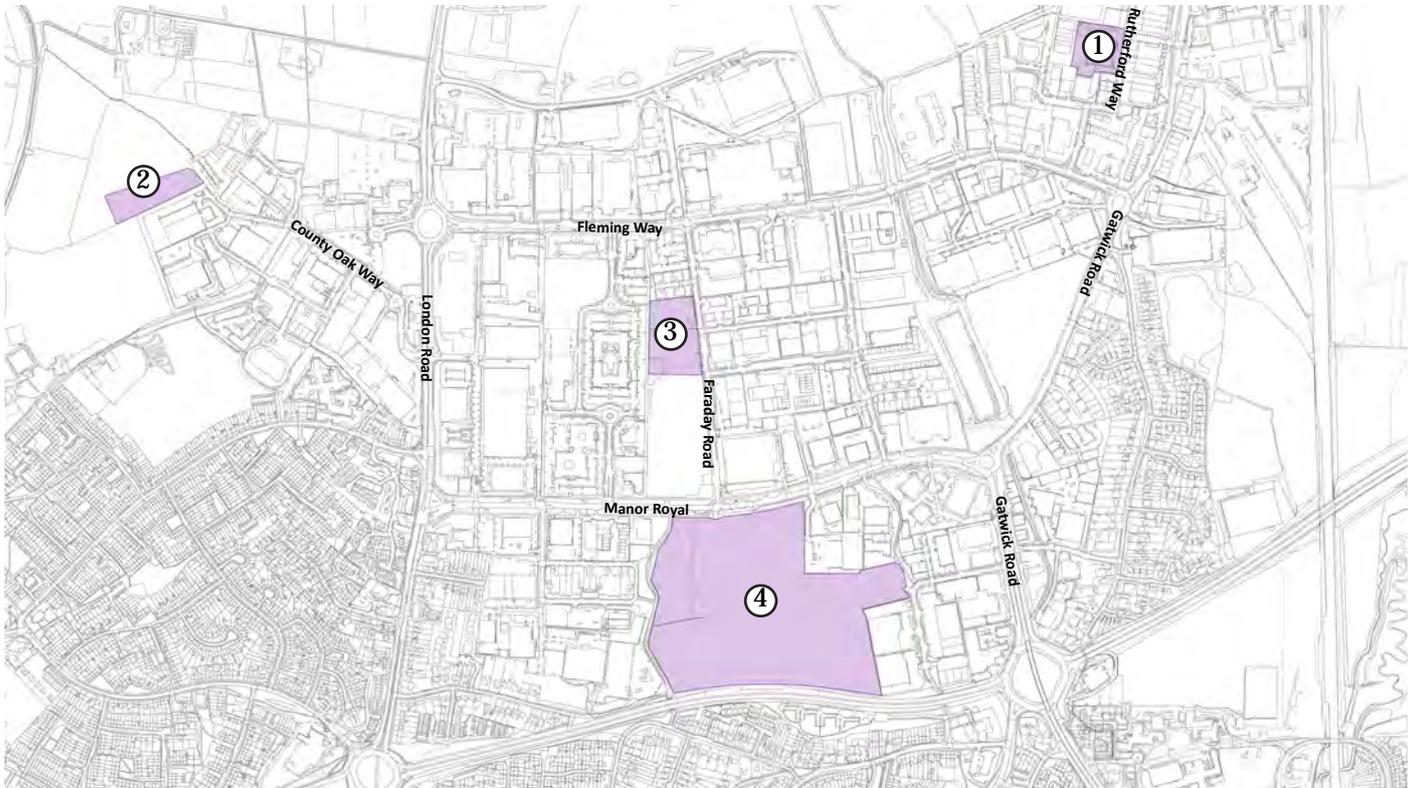
2. Nexus, Gatwick Road



3. Elekta, Cornerstone, Manor Royal

	Example Office Development			Quantum of Development	
	1. Leonardo, Crawley Business Quarter	2. Nexus, Gatwick Road	3. Elekta, Cornerstone, Manor Royal	Average	Highest
Building footprint to site ratio (%)	21	15	18	18	21
GEA floorspace to site ratio (%)	83	59	78	73	83
Height (storeys)	4	4	4-5	4	4-5
Parking Type	Surface	Surface	Surface/Decked	Surface/Decked	

Manor Royal Example Industrial Developments



Location of Manor Royal Example Industrial Developments



1. 5 Rutherford Way



3. Space Gatwick, Faraday Road



4. Principle Park

	Example Industrial Development				Quantum of Development	
	1. 5 Rutherford Way	2. Land at Jersey Farm*	3. Space Gatwick, Faraday Road	4. Principle Park (Phase 1 and 2)	Average	Highest
Use	B1, B2 and B8	B2 and B8	B2 and B8	B8	B class uses (Industry/warehouse)	
Building footprint to site ratio (%)	53	14	58	41	42	58
GEA floorspace to site ratio (%)	59	19	67	54	50	67
Height (storeys equivalent)	3-4	3	3-4	3-4	3	4
Parking Type	Surface	Surface	Surface	Surface	Surface	

*Awaiting determination - construction not yet started

4: Potential Capacity for Further Development

Sterling Park, Gatwick Road

Within the Sterling Park, Gatwick Road Opportunity Site there are two potential locations for additional development, a cleared site and an apparent disused car parking area.

Subject to detailed constraints analysis both the vacant plot and disused car parking area* could potentially accommodate industrial or office use.

The development potential may be informed/constrained by, but not limited to, the following:

- The operation and usage of existing industrial units within Sterling Park;
- Site boundaries that adjoin existing employment uses;
- Surrounding building heights (2-3 storeys); and
- Existing trees, verge and vegetation along Gatwick Road frontage (MRDG SPD).

**Development potential of the apparent unused car parking area would be subject to a full understanding of the current usage and ownership i.e. is it used in associated with any of the existing uses.*



Site Location: Vacant plot with Sterling Park Opportunity Site



1) Vacant plot (as existing, September 2017)



Site Location: Disused car park area within Sterling Park Opportunity Site



2) Unused car park (as existing, September 2017)



Aerial Image - (building on vacant plot has now been cleared, see image 1 left, aerial image date: 2013)

Site Area:0.17ha

Site Area:0.11ha

	1) Cleared Site			
	Average	Highest	Average	Highest
Use	Industrial	Industrial	Office	Office
Potential building footprint (sqm)	715	987	306	357
Potential GEA (sqm)	851	1140	1242	1413
Potential ancillary area (sqm)	987	715	1396	1345
Parking Type	Surface	Surface	Surface	Surface

	2) Disused Car Park			
	Average	Highest	Average	Highest
Use	Industrial	Industrial	Office	Office
Potential building footprint (sqm)	467	645	200	234
Potential GEA (sqm)	556	745	812	923
Potential ancillary area (sqm)	645	467	923	878
Parking Type	Surface	Surface	Surface	Surface

4: Potential Capacity for Further Development

Land at Crompton Way

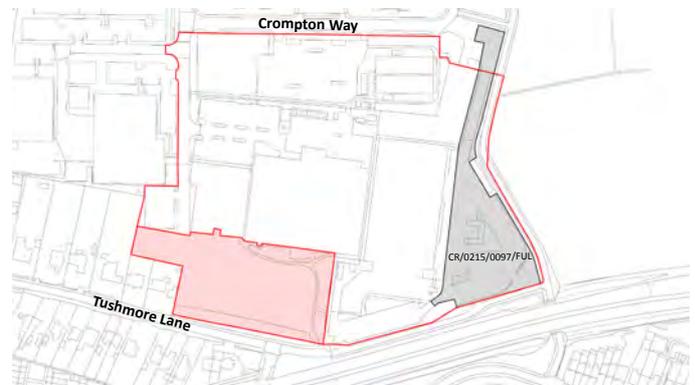
Within the Land at Crompton Way Opportunity Site there are two potential locations with opportunities for additional development; an undeveloped area associated with the CGG building and the cleared site to the south of the Crompton Way frontage*.

Subject to detailed constraints analysis, the locations (1 and 2 as shown on the plans right) within the Crompton Way site could potentially accommodate industrial uses of a similar scale to the existing industrial units located on/around Crompton Way.

The development potential may be informed/constrained by, but not limited to, the following:

- Potential impact on the adjoining residential area (1-2 storey dwellings adjoin the site boundary, Tushmore Lane);
- Surrounding building heights (2-3 storeys);
- Impact upon existing operations;
- Site access; and
- Existing vegetation.

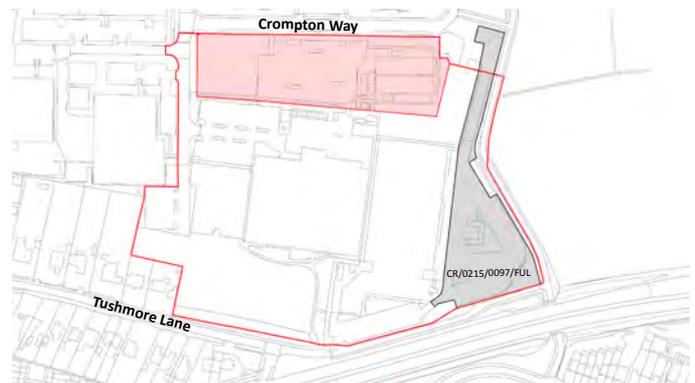
**Planning permission has been granted (ref: CR/0215/0097/FUL) for the site as identified in grey on the plans right; when implemented this area will increase employment capacity within the Land at Crompton Way Opportunity Site.*



Site Location: Private amenity area within Land at Crompton Way Opportunity Site



1. Existing pedestrian access to undeveloped area from Tushmore Lane



Site Location: Cleared site south of Crompton Way frontage



2. Cleared site view east from Crompton Way



Aerial (Google Earth 2013)

Site Area: 0.71ha

Site Area: 0.84ha

	1) Undeveloped Area	
	Average	Highest
Use	Industrial	Industrial
Potential building footprint (sqm)	2982	4117
Potential GEA (sqm)	3550	4756
Potential ancillary area (sqm)	4117	2982
Parking Type	Surface	Surface

	2) Cleared Site	
	Average	Highest
Use	Industrial	Industrial
Potential building footprint (sqm)	3517	4857
Potential GEA (sqm)	4187	5610
Potential ancillary area (sqm)	4857	3517
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

1. Hydehurst and Windyride Farms

The Hydehurst and Windyride Farm Opportunity Site is located to the north of Hydehurst Lane and to the south of the Gatwick Airport Safeguarded Land.

Subject to detailed constraints analysis, this site could potentially accommodate an industrial use of a similar scale to the existing industrial units south of Hydehurst Lane.

The development potential may be informed/constrained by, but not limited to, the following:

- Irregular shape of site (narrowing to eastern corner);
- A central hedgerow;
- Surrounding building heights (2-3 storeys);
- Power lines (taken underground at south east corner of site);
- Drainage ponds;
- Trees within site and to the west;
- A public right of way (PROW); and
- Changes in site levels.



Existing site access from Hydehurst Lane (foreground), existing buildings on site (background)



Central vegetated field boundary (left) and drainage pond (right)



Change in site levels and low voltage power lines



Welland industrial unit located to the south of Hydehurst Lane



Aerial (Google Earth 2013)

Site Area: 2.32ha

1. Hydehurst and Windyride Farms		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	9744	13456
Potential GEA (sqm)	11600	16240
Potential Ancillary Area (sqm)	13456	9744
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

2. Land at Little Dell Farm

The Land at Little Dell Farm Opportunity Site is located to the west of London Road and to the north The Atrium (office building) which currently denotes the boundary of the Manor Royal Business District (MRDG SPD).

Subject to detailed constraints analysis, this site could potentially accommodate a landmark office building that is of a similar scale to the existing buildings on London Road (up to 7 storeys) in order to denote the northern gateway into the Manor Royal Main Employment Area.

The development potential may be informed/constrained by, but not limited to, the following:

- Irregular shape of site (narrowing to western corner); and
- Boundary planting.

Development proposals for this site could be considered in conjunction with the Donkey Field and Wingspan Club Land Opportunity Sites (see 3 and 4).



Site located to the rear of this field - mature planting and The Atrium align the southern boundary of the site



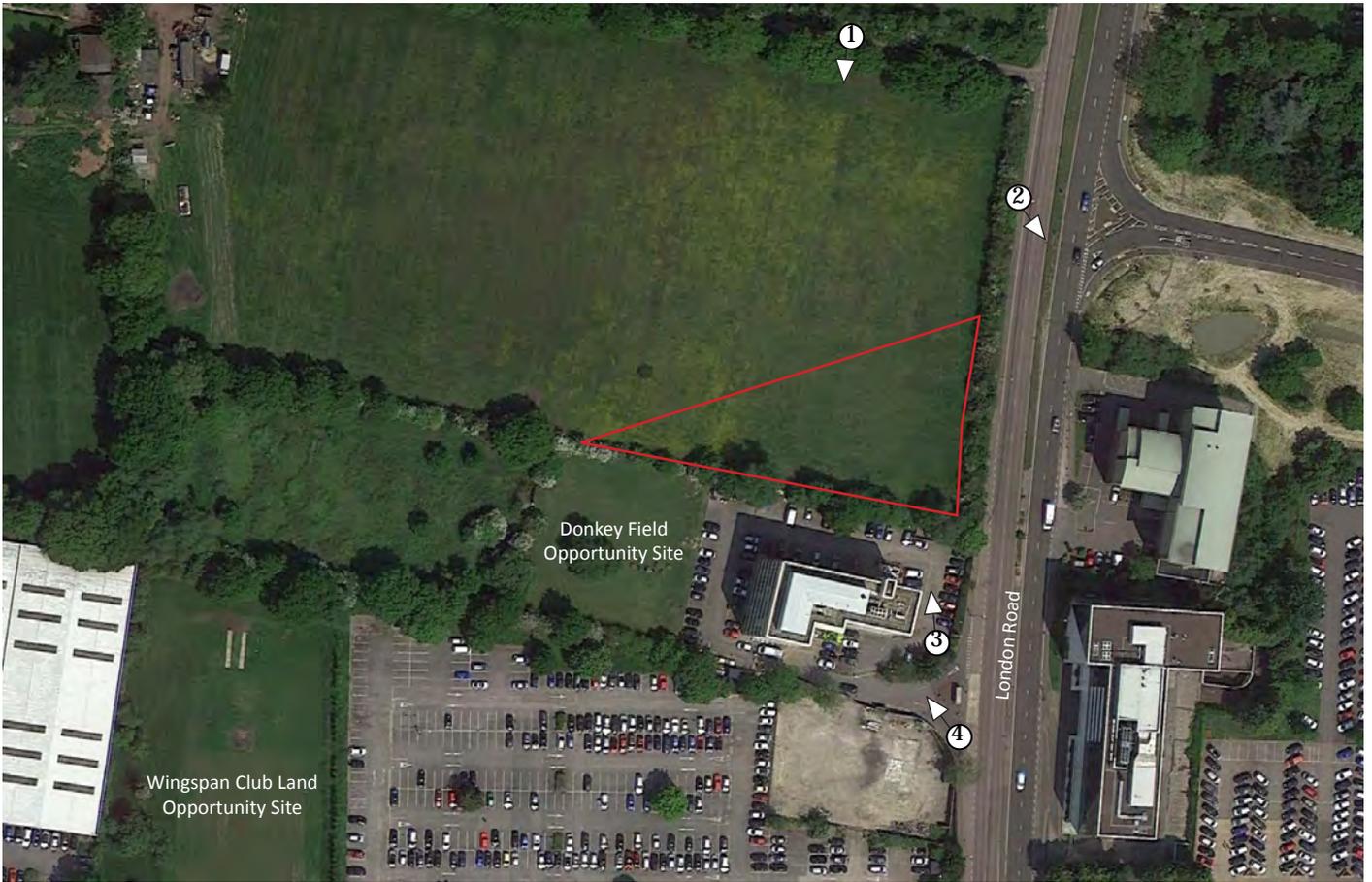
6-7 storey landmark buildings on London Road denote the entrance Manor Royal Business Area - site currently concealed (right) by vegetation



Site located to the rear of tree lined boundary



The Atrium - a six storey keynote building



Aerial (Google Earth 2013)

Site Area: 0.2ha

2. Land at Little Dell Farm		
	Average	Highest
Potential Use	Office	Office
Potential Building footprint (sqm)	360	420
Potential GEA (sqm)	1460	1660
Potential Ancillary Area (sqm)	1640	1580
Parking Type	Surface/Decked	Surface/Decked

5: Potential Redevelopment/Development Capacity

3. Donkey Field

The land at the Donkey Field Opportunity Site is located to the north Manor Royal Business District (MRDG SPD) boundary and to the west of The Atrium building on London Road.

Subject to detailed constraints analysis, this site could potentially accommodate office development of a similar scale to the existing office accommodation to the east and south of the site (up to 8 storeys).

The development potential may be informed/constrained by, but not limited to, the following:

- Irregular shape of site (narrowing to western corner);
- Trees and vegetation within and around site; and
- Site access (no road frontage).

Development proposals for this site could be considered in conjunction with the Little Dell Farm and Wingspan Club Land Opportunity Sites (see 2 and 4).

①



View into Donkey Field from Wingspan Club Land Opportunity Site

②

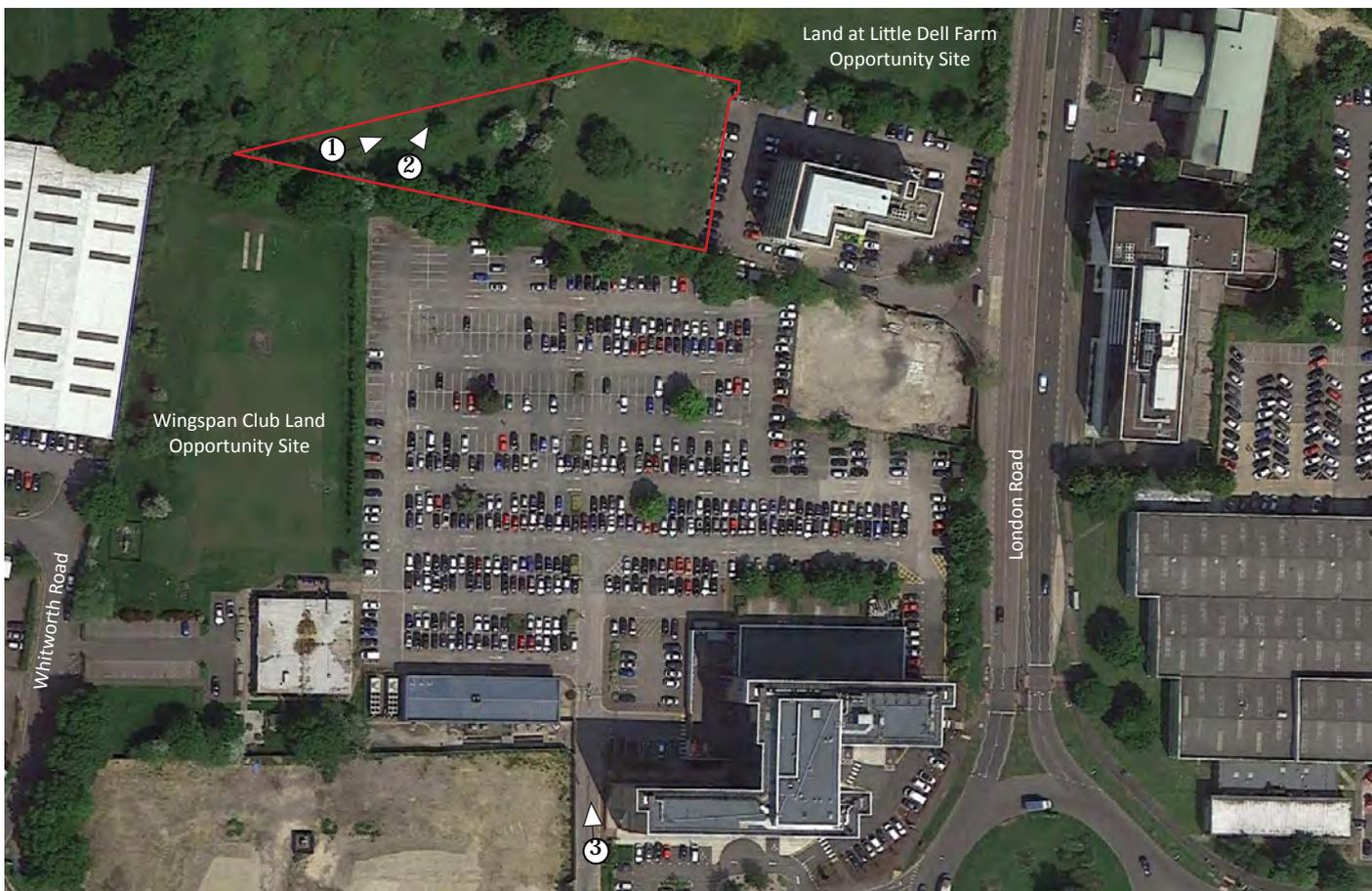


Looking north across site

③



Existing access to Astaral Towers car parking area



Aerial (Google Earth 2013)

Site Area: 0.38ha

3. Donkey Field		
	Average	Highest
Potential Use	Office	Office
Potential Building footprint (sqm)	648	798
Potential GEA (sqm)	2774	3154
Potential Ancillary Area (sqm)	3116	3002
Parking Type	Surface/Decked	Surface/Decked

5: Potential Redevelopment/Development Capacity

4. Wingspan Club Land

The Wingspan Club Land Opportunity Site is located within the Manor Royal Business District (MRDG SPD), to the east of Whitworth Road.

Subject to detailed constraints analysis, this site could potentially accommodate an industrial use of a similar scale to the existing, surrounding development.

The development potential may be informed/constrained by, but not limited to, the following:

- Surrounding building heights (2-3 storeys); and
- The trees and vegetation within and around the site, and at the potential access from Whitworth Road.

Development proposals for this site could be considered in conjunction with the Little Dell Farm and Donkey Fields Opportunity Sites (see 2 and 3).



Northern boundary defined by mature vegetation



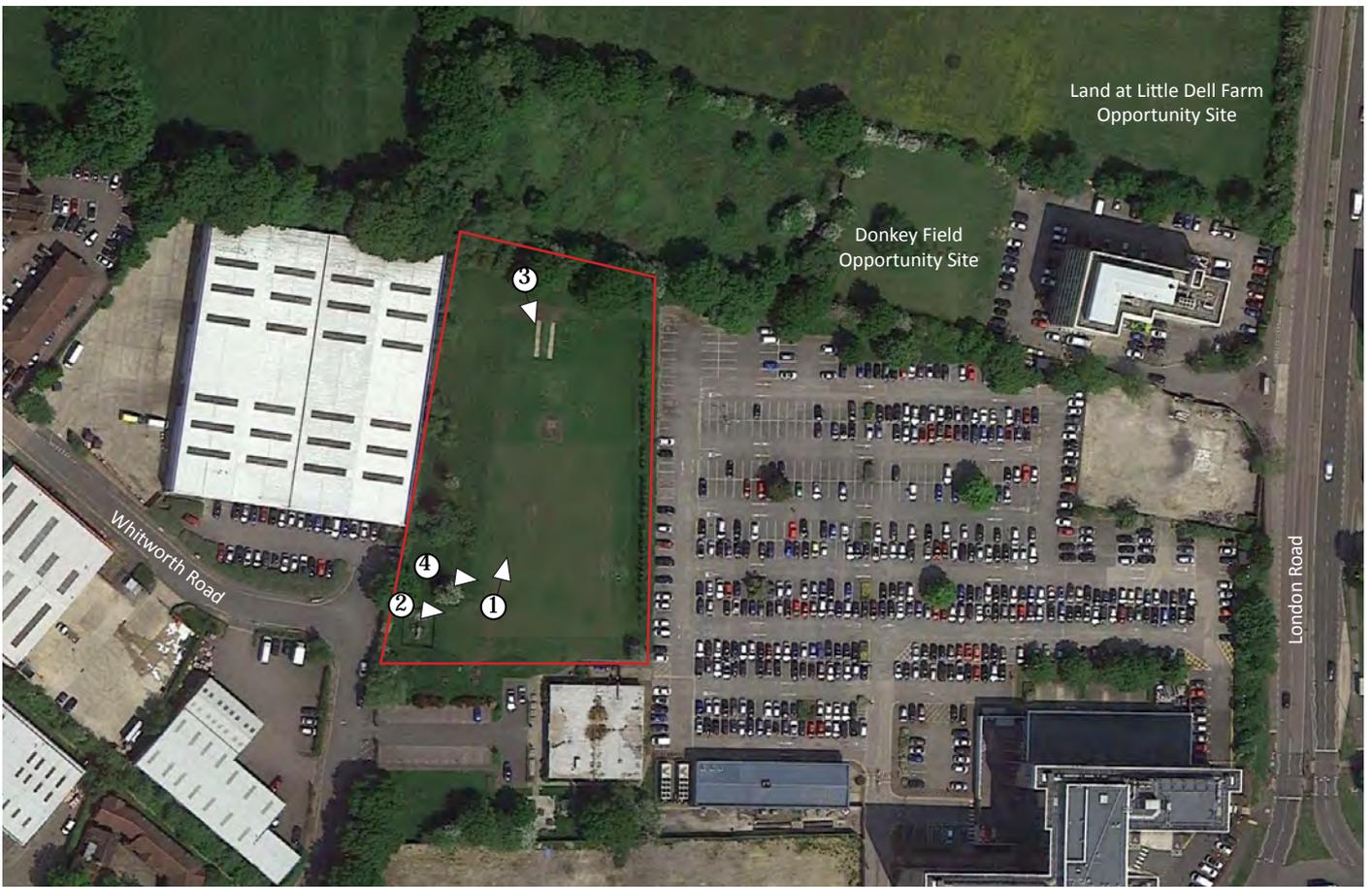
Play area at south-western corner of site



View of site from north western corner



Single storey building close to southern boundary. Taller buildings (left) associated with Manor Royal Primary Gateway 3 (as defined in SPD)



Aerial (Google Earth 2013)

Site Area: 0.64ha

4. Wingspan Club Land		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	2688	3712
Potential GEA (sqm)	3200	4288
Potential Ancillary Area (sqm)	3712	2688
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

5. Sterling Park, Gatwick Road

The Sterling Park Opportunity Site, is located east of Gatwick Road within the Northern Industrial Character Area of Manor Royal (MRDG SPD).

Subject to detailed constraints analysis, this site could potentially accommodate industrial uses.

The existing industrial uses, within the eastern section of this Opportunity Site have a high building footprint to site ratio and appear to maximise the usage of the site. Industrial redevelopment of this site may result in an overall decrease in capacity due to modern development seeking to increase parking and service provision*.

The existing verge and vegetation along the Gatwick Road frontage should be retained (MRDG SPD).

**However the existing capacity could be increased if the vacant plot and apparent unused car parking area, as identified in Section 4, were developed.*



Existing 2 storey equivalent industrial units



Vacant plot north western corner of site



Disused parking area



Centrally located internal access road aligned by parking areas and large rectilinear industrial unit



Aerial (Google Earth 2013)

Site Area: 2.33ha

5. Sterling Park, Gatwick Road		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	9786	13514
Potential GEA (sqm)	11650	15611
Potential Ancillary Area (sqm)	13514	9786
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

6. Napier Way

The Napier Way Opportunity Site is located within Primary Gateway 1 (MRDG SPD), to the west of Gatwick Road.

Subject to detailed constraints analysis, this site could potentially accommodate office or industrial development.

The existing industrial uses currently occupying this Opportunity Site have a high building footprint to site ratio and appear to maximise the usage of the site. Industrial redevelopment of this site may result in an overall decrease in capacity due to modern development seeking to increase parking and service provision.



Existing Gatwick Road frontage



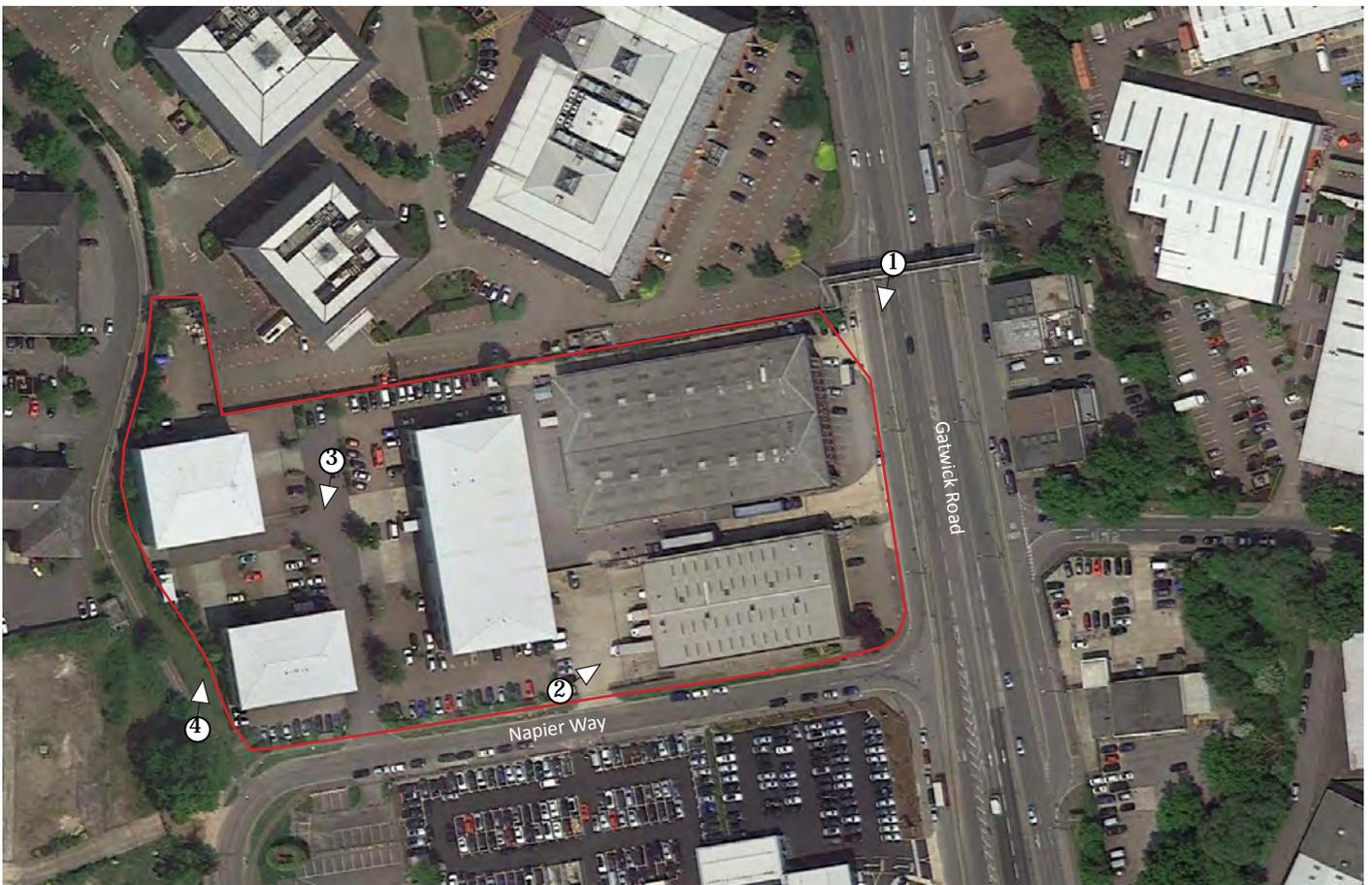
Servicing area and access, Napier Way



Inaccessible parking area



Existing cycle route adjoining western boundary of site



Aerial (Google Earth 2013)

Site Area: 1.71ha

6. Napier Way				
	Typical	Highest	Typical	Highest
Potential Use	Industrial	Industrial	Office	Office
Potential Building footprint (sqm)	7182	9918	3078	3591
Potential GEA (sqm)	8550	11457	12483	14193
Potential Ancillary Area (sqm)	9918	7182	14022	13509
Parking Type	Surface	Surface	Surface/Decked	Surface/Decked

5: Potential Redevelopment/Development Capacity

7. Crompton Way

The Crompton Way Opportunity Site is located south of Crompton Way and north east of Tushmore Lane.

Subject to detailed constraints analysis, this site could potentially accommodate industrial development*.

The development potential may be informed/constrained by, but not limited to, the following:

- Surrounding building heights (2-3 storeys);
- Potential impact on the adjoining residential area (buildings heights could increase in scale towards the eastern edge of the site, furthest from the residential properties located Tushmore Lane);
- Proximity of existing uses to site boundaries; and
- Trees along southern boundary and within site.

**Planning permission has been granted (ref: CR/0215/0097/FUL) for the east/south eastern section of the Crompton Way Opportunity Site as identified on page 9 of this study; however for the purposes of this study the redevelopment capacity assumes full site clearance.*



Private access to private amenity area



Vacant plot Crompton Way



Eastern site boundary and adjoining cycle route



Single storey dwelling Tushmore Lane



Aerial (Google Earth 2013)

Site Area: 4.62ha

7. Crompton Way		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	19404	26796
Potential GEA (sqm)	23100	30954
Potential Ancillary Area (sqm)	26796	19404
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

8. Sussex Manor Business Park

The Sussex Manor Business Park Opportunity Site, partially defined as a Secondary Gateway Location (MRDG SPD), is located to the east of the Gatwick Road and Fleming Way roundabout.

Subject to detailed constraints analysis, this gateway site could accommodate either office or industrial development. However, the existing industrial uses currently occupying this Opportunity Site have a high building footprint to site ratio and appear to maximise the usage of the site. Redevelopment of this site may result in an overall decrease in capacity due to modern development seeking to increase parking and service provision.

The development potential may be informed/constrained by, but not limited to, the following:

- Changes in site levels;
- Surrounding building heights (2-3 storeys);
- Landscaping and mature trees at Gatwick Road; and
- Trees at the western boundary.



Office building located at the north-eastern corner of the site



Large rectilinear industrial units



Existing site access



View into site from Gatwick Road



Aerial (Google Earth 2013)

Site Area: 5.92ha

8. Sussex Manor Business Park

	Average	Highest	Average	Highest
Potential Use	Industrial	Industrial	Office	Office
Potential Building footprint (sqm)	24864	34336	10656	12432
Potential GEA (sqm)	29600	39664	43216	49136
Potential Ancillary Area (sqm)	34336	24864	48544	46768
Parking Type	Surface	Surface	Surface/Decked	Surface/Decked

5: Potential Redevelopment/Development Capacity

9. Manor Place and Durand House

The Manor Place and Durand House Opportunity Site is located to the east of the Faraday Road/Manor Royal junction.

Subject to detailed constraints analysis, this site could potentially accommodate industrial development.

The development potential may be informed/constrained by, but not limited to, the following:

- Changes in site levels; and
- Surrounding building heights (2-3 storeys).

The existing industrial uses currently occupying this Opportunity Site have a high building footprint to site ratio and appear to maximise the usage of the site (including roof level parking). Industrial redevelopment of this site may result in an overall decrease in capacity due to modern development seeking to increase parking (surface) and service provision.



Durand House, existing access, building set back from street frontage via parking area



Servicing area and access to Manor Place's rooftop parking, Faraday Road



Manor Place, Manor Royal Frontage



Principle Park



Aerial (Google Earth 2013)

Site Area: 1.99ha

9. Manor Place and Durand House

	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	8358	11542
Potential GEA (sqm)	9950	13333
Potential Ancillary Area (sqm)	11542	8358
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

10. Manor Gate, Manor Royal

The Manor Gate Opportunity Site is partially located within Primary Gateway 1 (MRDG SPD). The site is located to east of Crawter's Brook, and to the west of Newton Road.

Subject to detailed constraints analysis, this gateway site could accommodate either office or industrial development.

The development potential may be informed/constrained by, but not limited to, the following:

- Surrounding building heights (2-3 storeys); and
- Proximity to Crawter's Brook



Existing access Newton Road



2-3 storey equivalent industrial building with ancillary office space



Existing access from Manor Royal



View of site from Manor Royal/ Gatwick Road roundabout



Aerial (Google Earth 2013)

Site Area: 1.35ha

10. Manor Gate, Manor Royal				
	Average	Highest	Average	Highest
Potential Use	Industrial	Industrial	Office	Office
Potential Building footprint (sqm)	5670	7830	2430	2835
Potential GEA (sqm)	6750	9045	9855	11205
Potential Ancillary Area (sqm)	7830	5670	11070	10665
Parking Type	Surface	Surface	Surface/Decked	Surface/Decked

5: Potential Redevelopment/Development Capacity

11. Enterprise Court

The Enterprise Court Opportunity Site is located on Metcalf Way to the east of the access Crawley Household Waste Recycling Centre access road.

Subject to detailed constraints analysis, this site could accommodate industrial uses.

Development proposals for this site could be considered in conjunction with the Former Amenity Site, Metcalf Way, Opportunity Site (see 12).



Existing industrial units



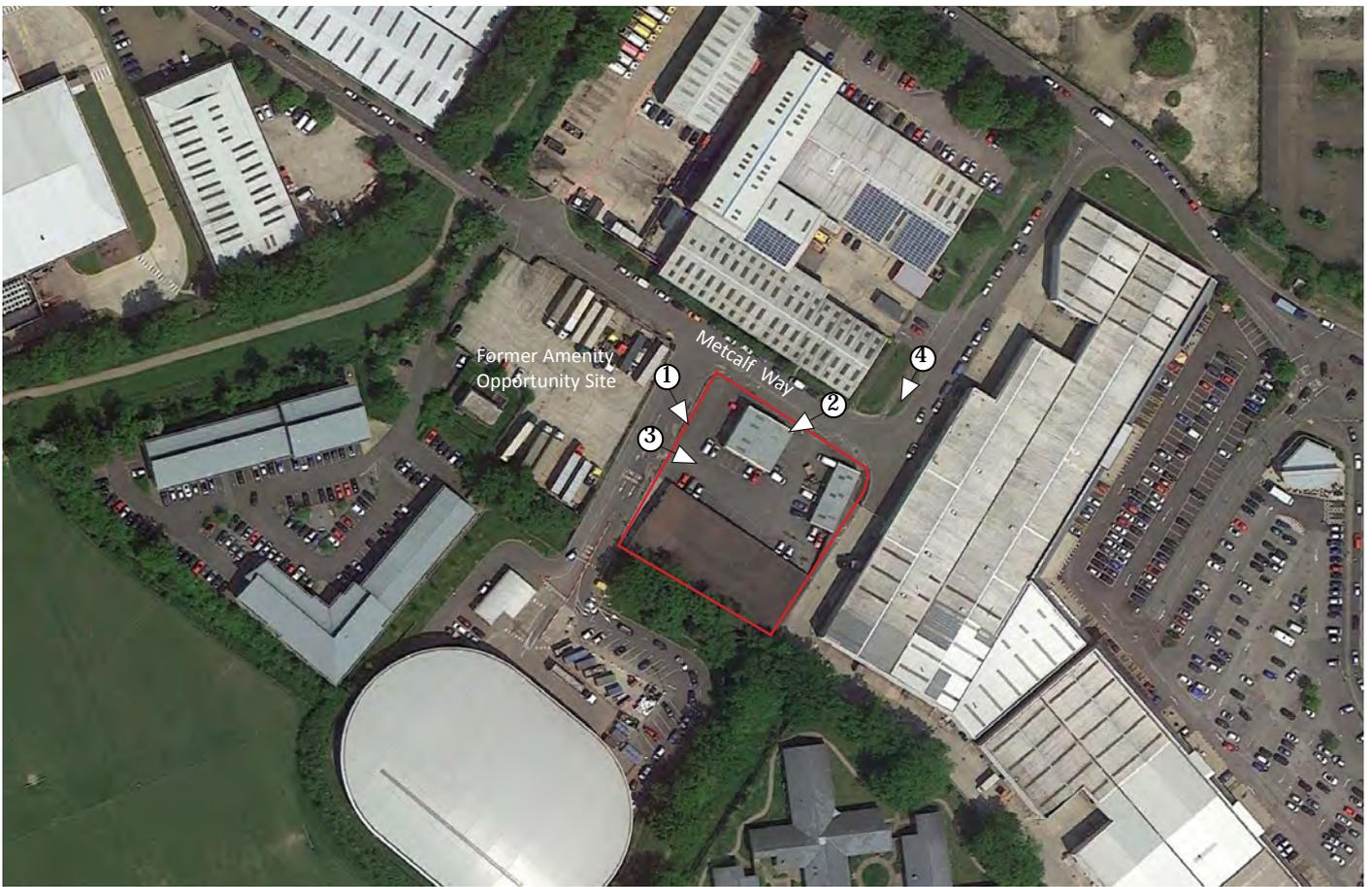
Existing Metcalf Way frontage



Existing servicing and parking area - large scale industrial unit (background) to the eastern boundary



View of site (south) from Metcalf Way



Aerial (Google Earth 2013)

Site Area: 0.33ha

11. Enterprise Court		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	1386	1914
Potential GEA (sqm)	1650	2211
Potential Ancillary Area (sqm)	1914	1386
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

12. Former Amenity Site, Metcalf Way

The Former Amenity Site is situated south of Metcalf Way and to the west of the Enterprise Court Opportunity Site.

Subject to detailed constraints analysis, this site could accommodate industrial uses.

The development potential may be informed/constrained by, but not limited to, the following:

- Surrounding building heights (2-3 storeys); and
- Changes in site levels.

Development proposals for this site could be considered in conjunction with the Enterprise Court Opportunity Site (see 11).



View into site from Metcalf Way



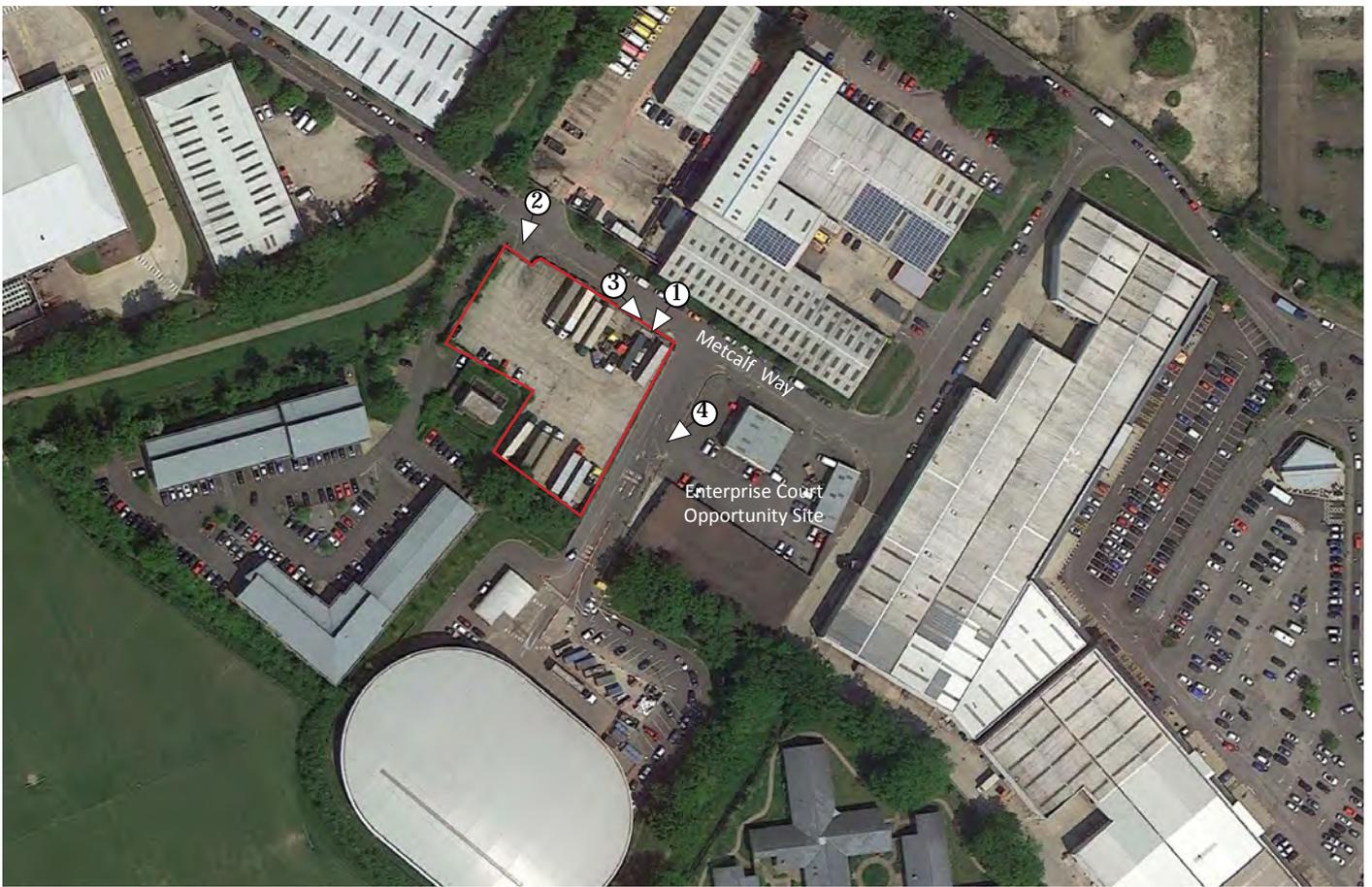
Access (exit only) Metcalf Way



Access (entrance only) Metcalf Way



View of western boundary from Enterprise Court



Aerial (Google Earth 2013)

Site Area: 0.29ha

12. Former Amenity Site, Metcalf Way		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	1218	1682
Potential GEA (sqm)	1450	1943
Potential Ancillary Area (sqm)	1682	1218
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

13. Jefferies Farm Car Supermarket

The Jefferies Farm Car Supermarket Opportunity Site, is located to the north east of the Fleming Way, within Manor Royal's Primary Gateway 3 (MRDG SPD).

Subject to detailed constraints analysis, this site could potentially accommodate a landmark office building of a similar scale to the existing office accommodation to the west of the site (up to 8 storeys).

The development potential may be informed/constrained by, but not limited to, the following:

Proximity of existing uses to site boundaries; and

- The existing verge and landscaping to London Road and Fleming Way (MRDG SPD).



Views of site looking north from London Road



Existing Fleming Road frontage



Elekta (office development) south of Jefferies Farm Car Supermarket Opportunity Site



Astral Towers (office development) - west of Jefferies Farm Car Supermarket Opportunity Site



Aerial (Google Earth 2013)

Site Area: 2.22ha

13. Jefferies Farm Car Supermarket		
	Average	Highest
Potential Use	Office	Office
Potential Building footprint (sqm)	3996	4662
Potential GEA (sqm)	16206	18426
Potential Ancillary Area (sqm)	18204	17538
Parking Type	Surface/Decked	Surface/Decked

5: Potential Redevelopment/Development Capacity

14. DPD and Focal Point

The DPD and Focal Point Opportunity Site is located to the north of Fleming Way.

Subject to detailed constraints analysis, this site could be redeveloped to provide industrial uses of a similar scale to the existing buildings.

Redevelopment of this site may not necessarily increase the floorspace provided as the current, modern, industrial units have a high footprint to site ratio and optimise the use of the site (with servicing areas to the rear and parking to the front).



① DPD, large rectilinear building footprint, building height equivalent to 4 storeys



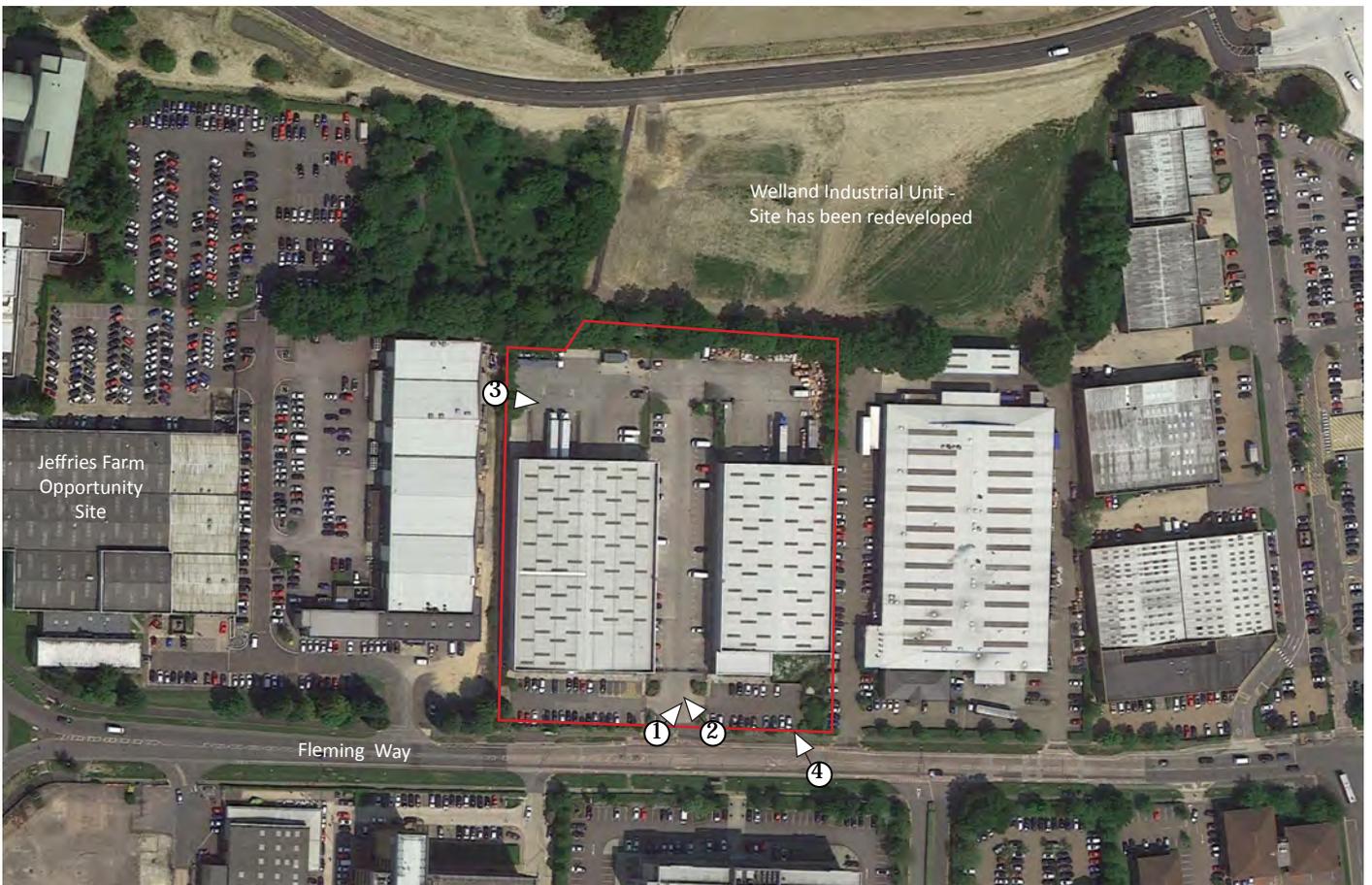
② Focal Point, set back from street via surface parking area



③ Existing service area located to the rear of the site - not visible from Fleming Way



④ Site frontage to Fleming Way



Aerial (Google Earth 2013)

Site Area: 1.65ha

14. DPD and Focal Point		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	6930	9570
Potential GEA (sqm)	8250	11055
Potential Ancillary Area (sqm)	9570	6930
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

15. Diamond Point

The Diamond Point Opportunity Site is situated north of Fleming Way, opposite the Newton Road junction.

Subject to detailed constraints analysis, this site could be redeveloped to provide industrial uses of a similar scale to the existing building. However, redevelopment of this site may not necessarily increase the floorspace provided as the current, modern, industrial unit has a high footprint to site ratio and optimises the use of the site (with servicing areas to the rear and parking to the front/side).



Existing frontage to Fleming Way



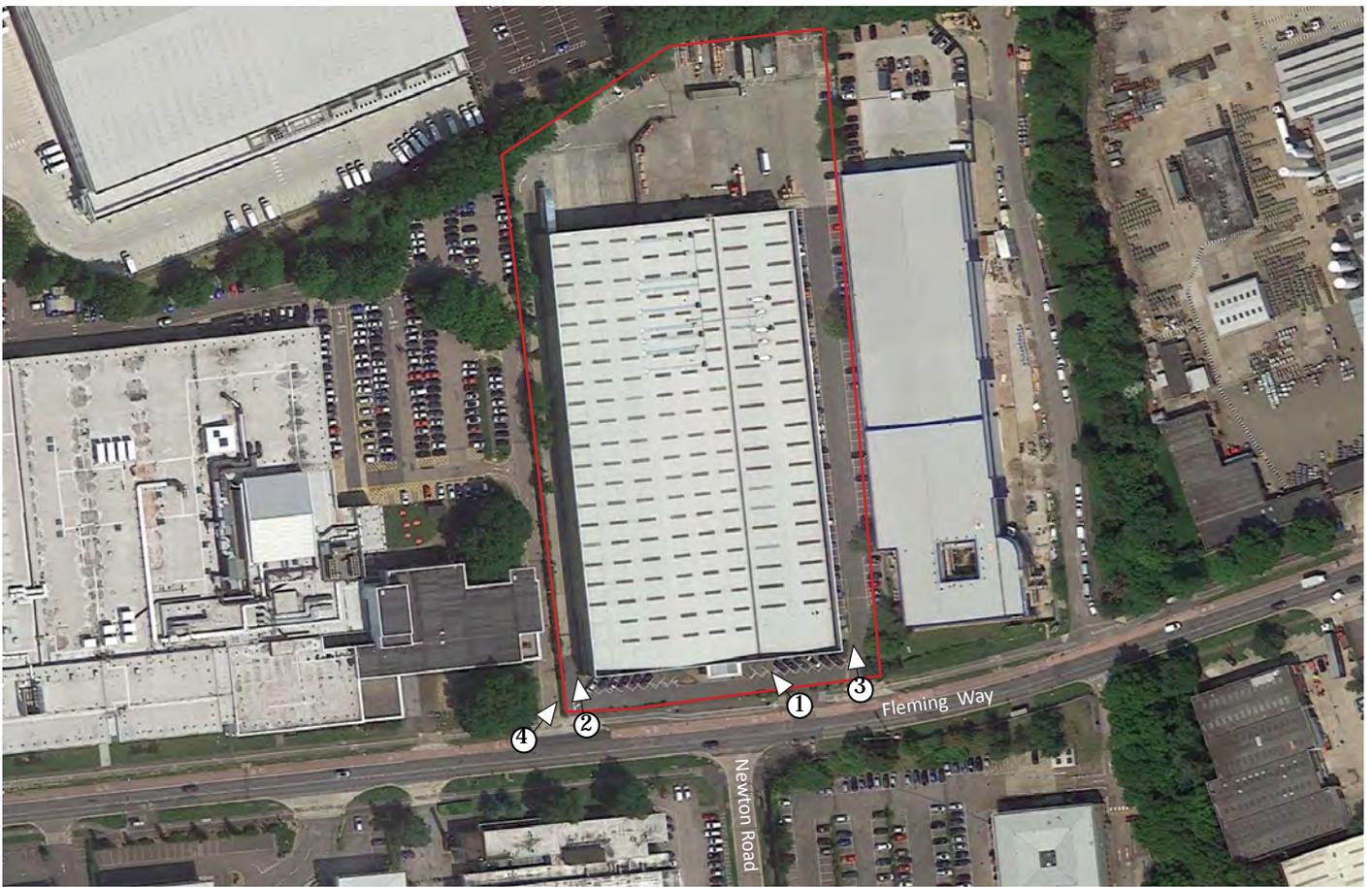
Servicing access from Fleming Way (entrance only)



Parking area set back from Fleming Way frontage to the side of the existing building.



Building frontage set back behind surface parking area



Aerial (Google Earth 2013)

Site Area: 1.88ha

15. Diamond Point		
	Average	Highest
Potential Use	Industrial	Industrial
Potential Building footprint (sqm)	7896	10904
Potential GEA (sqm)	9400	12596
Potential Ancillary Area (sqm)	10904	7896
Parking Type	Surface	Surface

5: Potential Redevelopment/Development Capacity

16. Bank Precinct and Land to the South

The Bank Precinct and Land to the South Opportunity Site is located within Manor Royals Primary Gateway 1 (MRDG SPD), to the east of Gatwick Road.

Subject to detailed constraints analysis, this gateway site could be redeveloped to provide either industrial or office uses.

The development potential may be informed/constrained by, but not limited to, the following:

- Narrow site shape;
- Changes in levels;
- Access considering proximity to Gatwick Road and existing trees
- Existing trees vegetation at the eastern boundary; and
- Crawter's Brook.



Existing single storey retail units



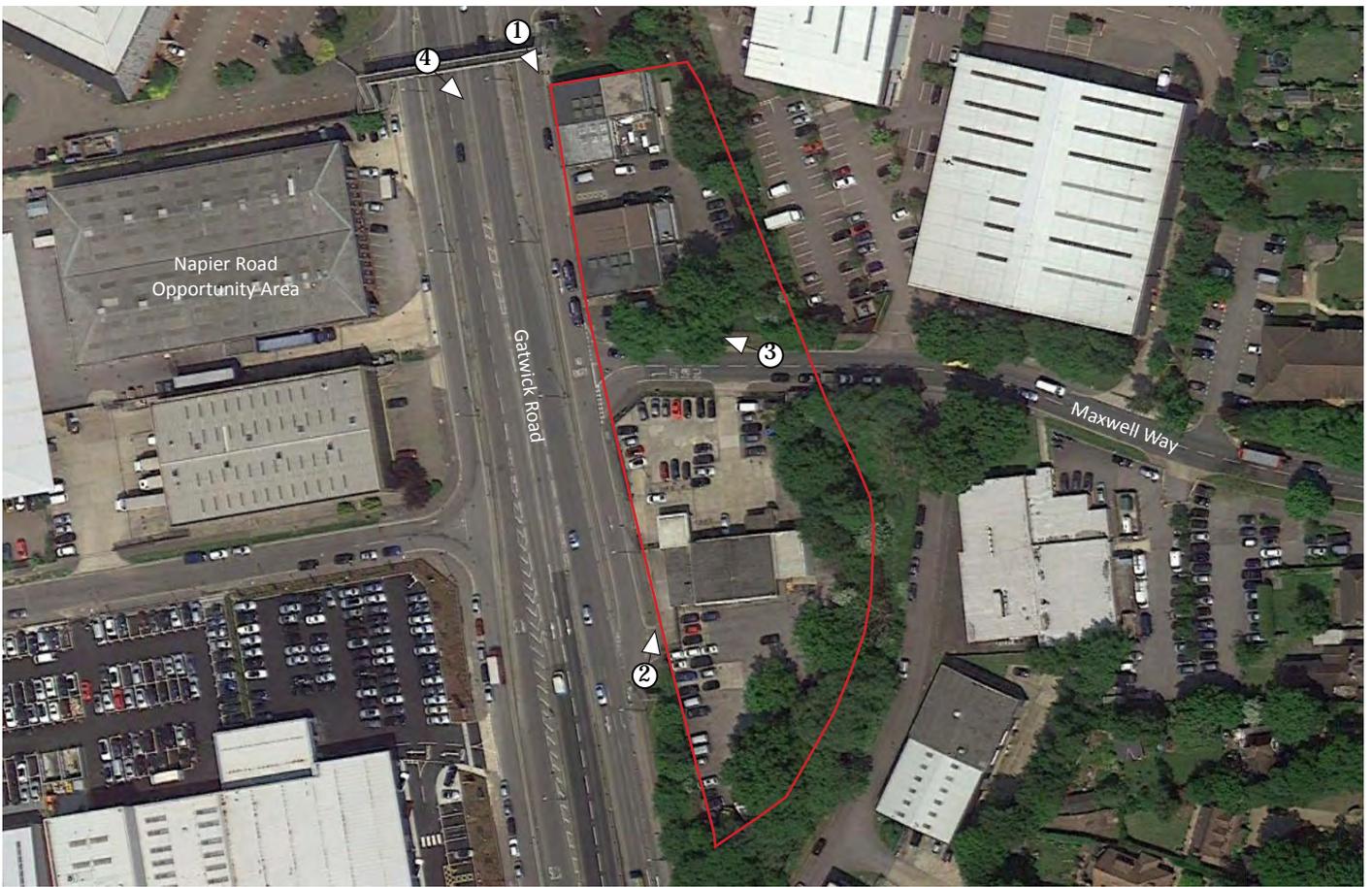
Existing car hire company



Parking area to the rear of retail units - drop in site levels towards Crawter's Brook



Existing cycle route adjoining western boundary of site



Aerial (Google Earth 2013)

Site Area: 0.69ha

16. Bank Precinct and Land to the South				
	Average	Highest	Average	Highest
Potential Use	Industrial	Industrial	Office	Office
Potential Building footprint (sqm)	2898	4002	1242	1449
Potential GEA (sqm)	3450	4623	5037	5727
Potential Ancillary Area (sqm)	4002	2898	5658	5451
Parking Type	Surface	Surface	Surface/Decked	Surface/Decked

Bristol
0117 403 1980
bristol@lichfields.uk

Cardiff
029 2043 5880
cardiff@lichfields.uk

Edinburgh
0131 285 0670
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0113 397 1397
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