

Haringey Employment Land Study

Final Report

February 2015

ATKINS



Plan Design Enable

Table of contents

Chapter	Pages
1. Introduction	5
2. Policy context update	6
Introduction	6
National Policy Context	6
Regional policy context	7
Local policy context	9
Key messages	11
3. Analysis of local property market	13
Introduction	13
Property market indicators	13
Investment deals	14
Leasing activity	14
B-Class commercial property market	15
Office	16
Industrial	16
Conclusion	17
4. Stakeholder consultation	18
Introduction	18
Existing situation	18
Type of B-use class demand	18
Policy issues	19
Opportunities and constraints for future growth	19
Conclusions and implications	19
5. Supply of employment land	20
Introduction	20
Total stock	20
Existing employment areas	21
Evaluation of Defined Employment Areas	22
Sources of employment floorspace supply	33
Key messages	38
6. Future employment land requirements	40
Introduction	40
Methodology	40
Scenario 1: Experian-based scenario	41
Scenario 2: London Plan aligned scenario	42
Scenario 3: Trend based scenario	43
Conclusion	45
7. Future employment site supply requirements	46
Introduction	46
Refining a future portfolio of employment sites	46
Supply update	46
Supply-demand balance	47
Conclusions	47
8. Conclusions and policy implications	49
Projected demand	49
Supply / demand balance	49
Policy implications	50

The role of live/work units	51
Implementation	52
Appendix A	53
Map of Defined Employment Areas (DEAs)	53



1. Introduction

- 1.1. Atkins Ltd was commissioned by the London Borough of Haringey in March 2014 to update key elements of the Haringey Employment Study undertaken by Atkins in February 2012. This update provides up to date analysis of the Borough's overall employment land supply as well as an assessment of the likely demand for employment land and premises up to 2031. It also sets out recent changes to the strategic policy context for economic development and their implications for the supply and demand for employment land in Haringey.
- 1.2. As part of the land supply update, specific consideration has been given to the appropriateness of the Council's proposed changes to eleven employment land designations.
- 1.3. The structure of the report is as follows:
 - Chapter 2 sets out key changes to the relevant local, regional and national policy context;
 - Chapter 3 provides a brief review of trends in the borough's commercial property market;
 - Chapter 4 provides a summary of the stakeholder consultation;
 - Chapter 5 sets out an up-to-date assessment of borough's supply of employment floorspace;
 - Chapter 6 examines the likely future demand for employment land in Haringey;
 - Chapter 7 presents a supply-demand balance assessment; and
 - Chapter 8 summarises the report's conclusions and recommendations.
- 1.4. Given that this report is a focused update of the employment land demand and supply position in Haringey, it should be read in conjunction with the full Employment Land Study produced in 2004 and the subsequent updates undertaken in 2008 and 2012.
- 1.5. It is noted that the purpose of this report is to provide an evidence based assessment of the supply and demand for employment land and premises in the Borough and make evidence-based recommendations. The London Borough of Haringey is responsible for developing the appropriate employment strategies and policies for the Borough, taking into consideration a range of other factors including housing and regeneration objectives.

2. Policy context update

Introduction

- 2.1. This section provides an updated policy context for the study and sets out conclusions on the implications of the policy review for LB Haringey. The review has included an assessment of the relevant local, regional and national policy context including the NPPF and emerging guidance. The Council's existing policy approach has also been reviewed.

National Policy Context

National Planning Policy Framework (NPPF)

- 2.2. The National Planning Policy Framework (NPPF), paragraph 158, outlines the requirement for local planning authorities to ensure that their Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of their area. Local planning authorities are asked to ensure that their assessment of strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals.
- 2.3. The NPPF states that local planning authorities should have a clear understanding of business needs. They should prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market and to work closely with the business community to understand their changing needs and identify and address barriers to investment, including a lack of housing infrastructure or viability.
- 2.4. Paragraph 161 of the NPPF asks local planning authorities to use this evidence base to assess:
- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development; and
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments and should include a reappraisal of the suitability of previously allocated land.

Planning Practice Guidance

- 2.5. The Department for Communities and Local Government's Planning Practice Guidance (PPG) is a web-based resource that brings together planning practice guidance for England in an accessible and usable way. The PPG guidance regarding housing and economic land availability assessments and housing and economic land availability assessments is of particular relevance to employment land studies.
- 2.6. PPG states that the assessment of economic development needs should take into consideration:
- Recent patterns of employment land supply and loss to other uses (based on extant planning permissions and planning applications);
 - Market intelligence (from local data and discussions with developers, property agents and local businesses) and market signals, such as levels and changes in rental values, and differentials between land values in different uses;
 - Potential infrastructure constraints;
 - The existing stock of employment land including recent statistics on take-up of sites;
 - Likely future business needs and future market requirements, including locational and premises requirements of particular types of business; and
 - Identification of oversupply and evidence of market failure.

- 2.7. In terms of forecasting future trends, PGG states that Plan makers should consider forecasts of both quantitative and qualitative need and future needs should be broken down by economic sectors. Plan makers should use a range of techniques to assess future employment land requirements including:
- Sectoral and employment forecasts and projections (labour demand);
 - Demographically derived assessments of future employment needs (labour supply techniques);
 - Analyses based on the past take-up of employment land and property and/or future property market requirements;
 - Consultation with key stakeholders, studies of business trends, and monitoring of business, economic and employment statistics.
- 2.8. Projected demand should then be compared to the available stock of land so that any gaps in local employment land provision can be identified. Sites or broad locations should be assessed in terms of their suitability for development, availability and realistic likelihood of coming forward for development.
- 2.9. PPG also advises that local planning authorities should assess their development needs working with other local authorities in the relevant housing market area or functional economic market area in line with the duty cooperate. This is because such needs are rarely constrained precisely by local authority administrative boundaries. The duty to cooperate does not mean local authorities need to necessarily agree with their neighbouring local authorities but they should make every effort to secure the necessary cooperation on strategic cross boundary matters before they submit their Local Plans for examination.

Regional policy context

- 2.10. It is important to consider the wider London context within which Haringey is situated. There are a number of issues and opportunities at regional level which the study will need to consider:

London Plan (2011)

- 2.11. The London Plan published in July 2011 sets out the Mayor's strategic spatial strategy for the Capital up to 2031. It forms part of the development plan for Greater London. London Boroughs' local plans need to be in general conformity with the London Plan, and its policies guide decisions on planning applications by councils and the Mayor.
- 2.12. The London Plan's employment projections for Haringey suggest a 15.5% increase in employment between 2007 and 2031 – an increase of 13,000 jobs. Therefore the rate of employment growth in Haringey is expected to be lower than the London average (16.6%) but higher than its neighbouring North London boroughs of Barnet (12.1%), Enfield (10.1%) and Waltham Forest (6.3%).
- 2.13. The London Plan designates two Haringey locations as Strategic Industrial Locations (SIL), the Central Leaside Business Area (part of which is in Haringey) and part of Tottenham Hale. Strategic Industrial Locations should be promoted, managed and, where appropriate, protected as London's main reservoirs of industrial and related capacity, including general and light industrial uses, logistics, waste management and environmental industries, utilities, wholesale markets and some transport functions.
- 2.14. Policy 2.2 identifies the importance of cross-border working within the London boundary between Local Authorities and the GLA to ensure a broadly aligned approach to planning policy.
- 2.15. Policy 2.3 provides detail on the growth areas and co-ordination corridors within London with a particular focus on accommodating new homes and new jobs.
- 2.16. Chapter 4 of the London Plan relates to London's Economy, it seeks to ensure that London is a 'city that meets the challenges of economic and population growth' and maintains its edge as an internationally competitive and successful city. The London Plan identifies that over the period 2007-2031, Haringey will experience 15.5% growth in employment.

- 2.17. Policy 4.1 recognises the importance of ensuring the ‘availability of sufficient and suitable workspaces in terms of type, size and cost, supporting infrastructure and suitable environments for larger employers and small and medium sized enterprises’.
- 2.18. Policy 4.4 states that LDFs should demonstrate how the Borough’s stock of industrial land and premises, local industrial sites and other industrial sites will be planned and managed in local circumstances. These should take account of a range of criteria set out in this policy, including the need to identify and protect locally significant industrial sites where justified by evidence of demand.
- 2.19. Policy 4.10 seeks to ensure that there is a sufficient supply of suitable land available to meet the needs of new and emerging economic sectors.

Draft Further Alterations to London Plan (2014)

- 2.20. The Mayor of London published the Draft Further Alterations to the London Plan in January 2014 and the document will be subject to public examination during September 2014.
- 2.21. The employment projections for Haringey suggest a 29.5% increase in employment between 2011 and 2036 – an increase of 22,000 jobs. Therefore the rate of employment growth in Haringey is expected to be higher than the London average (17.6%) and its neighbouring North London boroughs of Barnet (13.7%), Enfield (12.7%) and Waltham Forest (17.3%). There are no proposed changes in terms of industrial land release in Haringey, which remains at limited transfer.
- 2.22. In addition, the alterations include a requirement to support London’s science, technology and telecommunications sectors and ensure availability of a range of workspaces including start-up space, co-working space and ‘grow on’ space. A requirement is also included to monitor the impact of Permitted Development rights for change of use from office to residential.

Land for Industry and Transport Supplementary Planning Guidance (SPG)

- 2.23. The Land for Industry and Transport SPG published in September 2012 sets out guidance to supplement the policies in the 2011 London Plan (LP) relating to land for industrial type activities and transport.
- 2.24. This SPG sets out proposed guidance to supplement the policies in the 2011 London Plan (LP) relating to land for industrial type activities and transport. The SPG provides advice on how to implement these policies, in particular LP Policy 2.17 on Strategic Industrial Locations, Policy 4.4 on Managing Industrial Land and Premises, and Policy 6.2 on Providing Public Transport Capacity and Safeguarding Land for Transport.
- 2.25. The north sub-region has an expected release of 67 hectares, which is notably lower than the 338 hectares that are expected to be released in the East London sub-region. Haringey is included within the North sub-region categories, where industrial sites face pressure from other higher value land uses, such as residential.
- 2.26. Haringey is classified as limited transfer of industrial sites. This means that in developing site specific allocations and policies for the retention and release of land Haringey should take account of this classification. Boroughs in this category are seen as being intermediate between managed and restricted categories. Taking account of local variations of demand boroughs are encouraged to manage and where possible, reconfigure their portfolios of industrial land, safeguarding the best quality sites and phasing the release of industrial land in their DPDs in particular for waste management and logistics uses.

Table 2-1 Criteria for assessing the need for retention or release of industrial sites

Economic Criteria	(i) meets demonstrable local short term demand for industrial development, and / or strategic long term demand;
	(ii) offers potential for the in-situ expansion of existing industrial businesses;
	(iii) supports local or strategically important clusters of industrial activity;
	(iv) is viable for industrial development having regard to other criteria in paragraphs 4.14-4.16 and the value of the land in its existing (industrial) use

	<ul style="list-style-type: none"> (v) meets demand and addresses the particular needs of waste management, recycling, utilities (energy and water management) and land for transport (see Sections 6, 7 and Part B of this SPG); (vi) meets demand for new or emerging industries including green industries and those which support innovation and research (London Plan Policy 4.10) (vii) is well located to take advantage of existing or proposed infrastructure or economic development / regeneration funding (viii) offers potential for the provision of industrial units for Small and Medium Sized Enterprises (SMEs) serving local residential and commercial areas, particularly where there is little alternative provision in the local area; (ix) is needed to accommodate provision for transport in terms of London Plan policy and Mayoral guidance on provision for transport and safeguarding river related uses, for example, bus garages, rail depots, interchanges and terminals, wharves, boat yards and inter-modal sites; (x) provides lower cost industrial accommodation suitable for small, start-up, or lower-value industrial uses or other industrial related businesses important to the local economy.
Land Use Criteria	<ul style="list-style-type: none"> (i) is well located in relation to the strategic highway network or local highway network, in particular causing minimal traffic impact in residential areas; (ii) is well located in relation to the rail, river or canal network including inter-modal rail heads and safeguarded wharves, offering potential for transport of goods by rail and/or water transport; (iii) is well located in relation to the Central Activities Zone, town centres and/or public transport facilities, recognising that many industrial activities have relatively low trip generation and that other land uses (such as offices, leisure and retail) may be more appropriate in locations with high public transport accessibility; (iv) is part of a larger cluster of existing industrial activity, or area designated for industrial protection including SILs and LSIS, where re-designation of the industrial site would alter the industrial character of the area or inhibit the operations of nearby industrial uses; (v) offers potential for 24-hour working, or provides facilities for 'bad neighbour uses (by virtue of issues including, for example, noise, access, traffic generation, hours of operation, lighting and air quality) without detriment to residential amenity, being well screened from neighbouring uses, particularly residential areas; (vi) offers potential for waste management or recycling uses; (vii) offers potential for space intensive activities which do not fall within the ambit of this SPG and would not, in this location, compromise wider planning objectives; (viii) provides sufficient space for adequate operational parking and turning space for goods vehicles (see London Plan Policy 6.13 and Part B of this SPG)
Demand Criteria	<ul style="list-style-type: none"> (i) has been adequately marketed through a commercial agent at a price that reflects market value for industrial use for a reasonable period (normally at least two years) and offered with potential for redevelopment of derelict or obsolete industrial premises where this is required to meet the needs of modern industrial users; (ii) has been vacant for a considerable period (normally at least two years, and up to five years in areas of generally strong demand), without realistic prospect of industrial re-use.

Source: Land for Industry and Transport Supplementary Planning Guidance (SPG)

Local policy context

- 2.27. Haringey's local development plan is made up of the Local Plan: Strategic Policies 2013 and the Saved UDP Policies.
- 2.28. The Site Allocations Development Plan Documents (DPDs) has recently subject to public consultation from 17 January-7 March 2014. The Development Management Policies document was consulted in May 2013 and the next consultation will be carried out later in 2014.

Haringey Local Plan: Strategic Policies (2013)

- 2.29. In March 2013 Haringey's Local Plan: Strategic Policies was formally adopted by Haringey Borough Council. The Local Plan sets out the strategic plan for the future development of the Borough up to 2026.
- 2.30. Policy SP8 (Employment) sets out a hierarchy of employment areas that are differentiated by the types of uses that can be accommodated on the sites along with the degree of flexibility permitted in accommodating an element of non B use employment as well as some non-employment uses. The Strategic Industrial Locations and Locally Significant Industrial Sites (LSIS) designations provide strong protection to ensure that sites are protected for B class uses, while Local Employment Area (Employment Land) (LEA EL) and Regeneration Area (RA) designations provide greater flexibility in accommodating employment generating uses beyond traditional B class uses as summarised in **Table 2-2**.

Table 2-2 Summary of Local Plan Employment Land Designations

Employment Designation	Policy Description
Strategic Industrial Locations (SIL)	The Council will safeguard the following sites as Strategic Industrial Locations (SIL) as identified in the London Plan. Tottenham Hale; and Part of Central Leaside
Locally Significant Industrial Sites (LSIS)	The Council will safeguard the following sites as Locally Significant Industrial Sites (LSIS) for a range of industrial uses (B1 (b), (c), B2 and B8) where they continue to meet demand and the needs of modern industry and business. Crusader Industrial Estate, N15; Cranford Way, N8; High Road West, N17; Lindens/Rosebery Works, N17; Queen Street, N17; South Tottenham, N17; Vale Road/Tewksbury Road, N15; and White Hart Lane, N17.
Local Employment Area (LEA) – Employment Land (EL)	Employment Land (EL) is land that is deemed acceptable for other employment generating uses that complement the traditional 'B' use classes, such as a small scale "walk-to-retail", cafes and creche/nursery.
Local Employment Area (LEA) - Regeneration Area (RA)	A Regeneration Area (RA) is the most flexible of the categories as it can include uses appropriate in a mixed use development, such as small scale "walk-to" retail, community and residential uses. However, the approach to mixed uses in Regeneration Areas must have regard to London Plan town centre and retail policies, so not to encourage retail development outside of town centres.

Source: Haringey Local Plan (2013)

- 2.31. Policy SP9 (Improving skills and training to support access to jobs and community cohesion and inclusion) seeks to promote the diversification of the borough's economy and support new and expanding employment sectors such as green industries, small and medium sized enterprises. The Core Strategy indicates that the provision of high quality small and medium units for SMEs will be supported in the Haringey Heartlands area in order to expand the Cultural Quarter and to further develop the existing physical links with this area and Wood Green Metropolitan Town Centre.

Saved Unitary Development Plan policies (2009)

- 2.32. Haringey's Unitary Development Plan (UDP) has been saved post the Local Plan Adoption in 2013. The 22 Defined Employment Areas are identified by their planning designation in **Table 2-3**.

Table 2-3 Defined Employment Areas within LB Haringey

DEA No.	Site	Designation
DEA1	Crusader Industrial Estate, N15. Ashfield Road	LSIS
DEA2	Bound Green Industrial Estate, N11	EL
DEA3	Brantwood Road, N17	SIL
DEA4	Campsbourne, N8	RA
DEA5	Cranford Way, N8	LSIS
DEA6	Friern Barnet Sewage Works, N10	EL
DEA7	Hale Wharf, N17	RA
DEA8	N17 Studios 784-788 High Road	EL
DEA9	High Road West, N17	LSIS
DEA10	Lindens / Roseberry Works, N17	LSIS
DEA11	Millmead / Ashley Road, N17	SIL (Millmead) / RA (Ashley Road)
DEA12	North East Tottenham, N17	SIL
DEA13	Queen Street, N17	LSIS
DEA14	South Tottenham, N15	LSIS
DEA15	Tottenham Hale, N17	SIL / RA
DEA16	Vale Road / Tewkesbury Road, N15	LSIS
DEA17	White Hart Lane, N17	LSIS
DEA18	Willoughby Lane, N17	RA
DEA19	Wood Green, N22	RA
DEA20	High Road East, N17	EL
DEA21	Marsh Lane, N17	SIL
DEA22	Rangemoor Road, Herbert Road, N15	RA

Source: Haringey Council, Saved Policies UDP Post Local Plan Adoption (2013)

Key messages

- 2.33. The following are considered to be the key messages, relevant to this study due to the policy and evidence base review. The main change to the strategic policy context since the previous ELR has been the introduction of the National Planning Policy Guidance (NPPG) and approval of Haringey's Local Plan: Strategic Policies.

National policy context

- 2.34. The NPPF (2012) consolidated all policy statement, circulars and guidance documents into a single, simple framework. The NPPF clarifies that local planning authorities should have a clear understanding of business needs within the economic markets operating across their local area while local authorities are encouraged to work together with county and neighbouring authorities and with Local Enterprise Partnerships (LEPs), known as the duty to co-operate.
- 2.35. Emerging planning practice guidance prepared by DCLG (2013) has been developed following the recommendations of the External Review of Planning Practice Guidance (the Taylor Review). Emerging guidance related to the assessment of housing and economic development needs is aimed at supporting local planning authorities in objectively assessing and evidencing development needs for economic development. The primary objective of assessing need is recognised as being to identify the future quantity of land or floorspace required for economic development uses including both the quantitative and qualitative needs for new development.
- 2.36. Emerging planning practice guidance also considers functional economic market areas (FEMA). Emerging guidance outlines that the geography of commercial property markets should be

thought of in terms of the requirements of the market in terms of the location of premises and the spatial factors used in analysing demand and supply for the FEMA. The emerging guidance recognises that there is no standard approach to defining a FEMA.

Regional and local policy context

- 2.37. The London Plan projects employment in Haringey to grow by 13,000 jobs over the period 2007-2031, a rate of growth significantly higher than the other North London boroughs.
- 2.38. The Mayor's SPG on Industrial Capacity provides guidance to ensure that there is an adequate stock of industrial capacity in London and to plan, monitor and manage the release of surplus industrial land. This includes the identification of key criteria for boroughs to assess the need for retention or release of industrial sites.
- 2.39. The Local Plan sets out a hierarchy of employment areas that are differentiated by the types of uses that can be accommodated on the sites and the Council has proposed a series of changes to DEA designations that reflect the individual characteristics of each site and the wider economic and regeneration needs of each location.

3. Analysis of local property market

Introduction

- 3.1. This section provides an examination of Haringey's market for B-class uses drawing upon the EGI (Estates Gazette) commercial property database to identify 'market signals', such as vacancy rates, stock and rental levels by location and property type. The following provides a summary of our property market research; it provides detail on recent market activity across the Borough according to the main property market indicators, including rents, investment deals and leasing activity and discussions with local commercial agents.

Property market indicators

- 3.2. The property market indicators that were analysed for Haringey include rents, investment deals and leasing activity using the EGI market data and discussions with local commercial agents. Comparisons were made against other key centres in East London, including Barking / Dagenham and Stratford.

Office rents

- 3.3. Typical monthly rents for office premises currently marketed, range from £120 - £170 per sqm with an average of £140 per sqm. Higher quality offices such as new build, business park office space and second hand grade A are attracting an average asking rent of £150 - £170 per sqm, according to the EGI market data. Second hand B grade and new refurbished office space typically had an average rent of £120 - £170 per sqm. Local commercial agents identified that office accommodation in the Borough typically achieved rental values of £108 - £150 per sqm, with only higher quality office accommodation (within good public transport links, sufficient car parking and within a town centre location) achieving over £200 per sqm.
- 3.4. Local agents considered that the office market in Haringey is weak and struggles as it does not form part of the attractive Central London office market. Other competing neighbouring centres in North London and Hertfordshire are achieving similar rents, with Haringey achieving between £110 - £180 sqm, Enfield achieving between £115 - £150 per sqm and Harlow achieving slightly lower rents of between £85 – £120 sqm.

Industrial rents

- 3.5. EGI market data identified that typical monthly rents for industrial (B1c/B2 and B8) typically ranged from £50 - £100 with an average of £90 per sqm. Local commercial agents identified that good quality industrial premises typically achieved realistic rental values of £82 - £102 per sqm and lower grade industrial space achieving less than £70 per sqm.
- 3.6. Other competing neighbouring centres in North London and Hertfordshire are achieving similar rents, with Haringey achieving between £70 - £85 sqm, Enfield achieving between £75 - £95 per sqm and Harlow achieving slightly lower rents of between £65 – £75 sqm.
- 3.7. There is perceived to be a lack of supply of build developments catering for industrial and warehousing uses, local commercial agents noted that there was high occupancy in the existing protected industrial estates. The stakeholder consultees identified that the Borough was suffering from limited industrial stock and pressure from development for other uses e.g. residential.

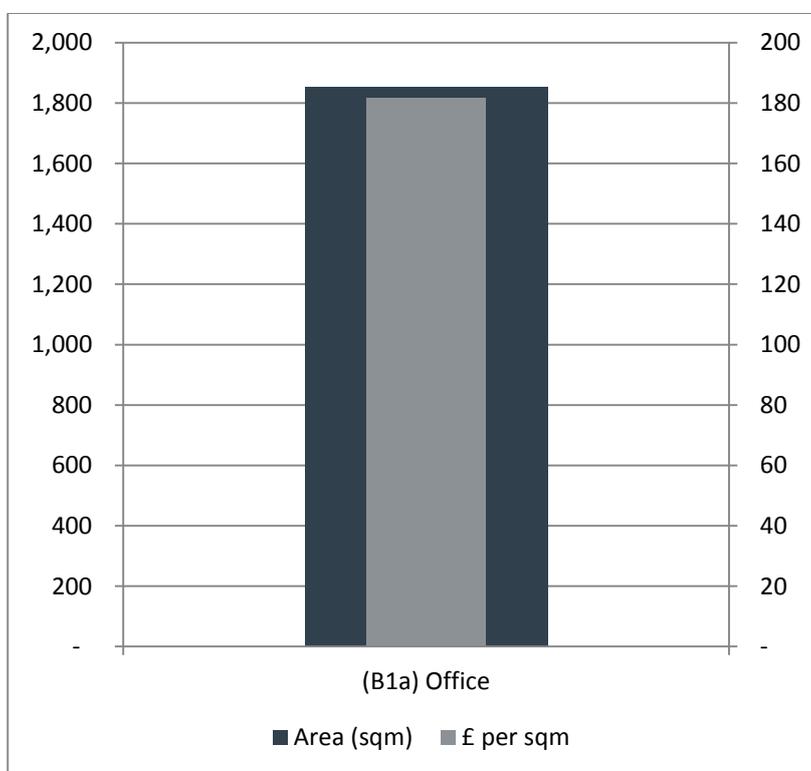
Investment deals

- 3.8. The volume of transactions across Haringey has been limited in recent years as occupiers retrench in the recessionary conditions. There have been quite a few sale and investment transactions in both office and industrial sectors in Haringey in 2012 – 2014, with seven sales for industrial units and only one sale recorded for office. In general industrial (B1/B2/B8)¹ most sales transactions were for units of between 455 sqm and 1,055 sqm with price varying between £450,000 and £1,315,000. In (B1a) office sales the only transaction was for 136 sqm for £290,000.

Leasing activity

- 3.9. In comparison to investment deals, there has been a consistent stream of leasing activity in Haringey, particularly for industrial space.
- 3.10. New office leases in the Borough totalled 1,854 sqm between March 2012 and March 2014 (EGI). On average the amount of floorspace leased was 309 sqm.

Figure 3-1 Total office floorspace leased by type (March 2012 - March 2014) and average rental value



Source: Atkins based on EGI data, 2013/2014

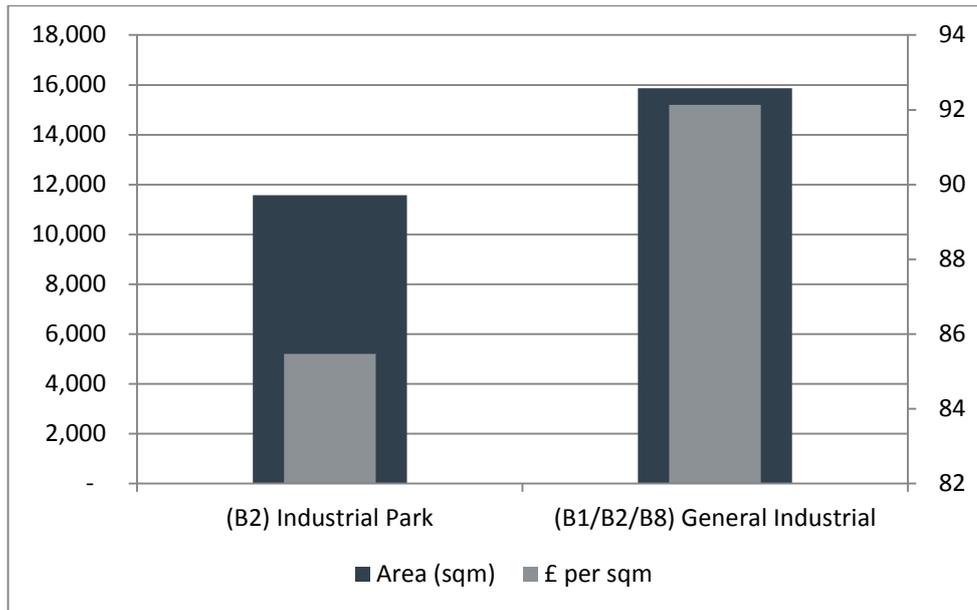
- 3.11. **Figure 3-1** shows the total office floorspace leased by type and the average annual rental for the period March 2012 to March 2014. Typically 100% of all office space leasing was for office development (B1a) leased at an average rental of £182 per sqm (depending on size and location) there were no research / business parks (B1b use class) leased over the same period.
- 3.12. New industrial leases in Haringey have totalled 27,436 sqm of floorspace between March 2012 and March 2014, with an average premises floorspace of 90 sqm. **Figure 3-2** shows the total industrial floorspace leased by type and the average annual rental for the period March 2012 to March 2014. Typically 40% of all leasing was in dedicated Industrial parks (B2 use classes) with an average rental rate of £85 per sqm and around 54% in general industrial space (B1/B2/B8 use classes)² with an average rental rate of £92 per sqm. The floorspace per transaction for industrial

¹ General Industrial as per EGI classification included B1 use classes, which was assumed to be small support office space within the industrial development

² EGI classification for general industrial includes B1 uses classes which is assumed to small office to support industrial uses

parks was similar with industrial parks (B2 use classes) achieving an average of 92 sqm and industrial space (B1/B2/B8 use classes) achieving an average of 85 sqm.

Figure 3-2 Total industrial floorspace leased by type (March 2012 - March 2014) and average rental



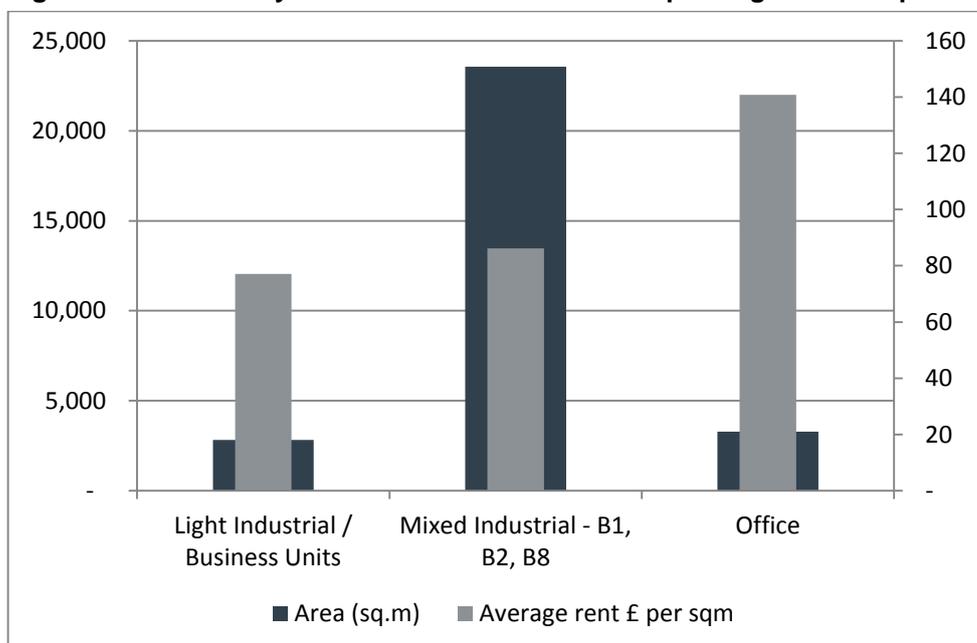
Source: Atkins based on EGI data, 2012/2014

B-Class commercial property market

3.13.

Figure 3-3 shows the distribution of available B-class commercial floorspace by type against the most recent asking price. The EGI data identifies that Haringey has over 29,669 sqm of actively marketed B-class use employment vacant floorspace.

Figure 3-3 Availability of industrial and office floorspace against last quoted rental value



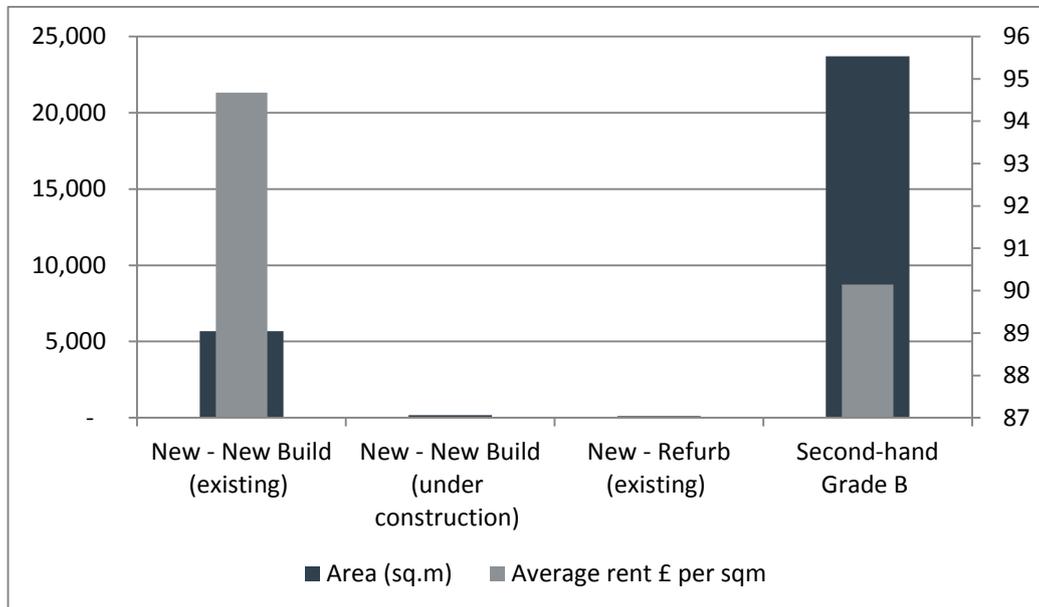
Source: Atkins based on EGI data, 2012/2014

3.14.

The majority of available B-class commercial floorspace is concentrated in mixed industrial (B1/B2/B8) floor space (79%) which constituted 23,570 sqm, office floorspace (B1a) accounted for 11% of available floorspace, this equated to 3,282 sqm of floorspace. Whilst light industrial / business units (B1c use class) constituted 9% of the market with around 2,818 sqm of floorspace.

Figure 3-4 shows EGI data on current actively marketed office and industrial space by quality against the most recent asking price. The quality of office and industrial space shows that 80% of all actively marketed space is second-hand grade B. The second hand Grade B stock was concentrated in mixed industrial (25 units) and light industrial (66 units). There were only two new build properties. This may lead to limit the choice of industrial and office space quality and development flexibility options offered to future tenants looking to invest in the Borough

Figure 3-4 Marketed industrial and office floorspace by quality and average rental (£ per sqm)



Source: Atkins based on EGI data, 2012/2014

Office

- 3.15. Haringey has a relatively weak office market, in contrast to destinations that are closer to Central London. The low level of demand is generally for smaller offices located within serviced accommodation. Haringey's office market is considered to serve locally based companies.
- 3.16. Local commercial agents in the area identified that leasing inquiries for office space tended to be for smaller sized units up to 185 sqm serving the needs of small local businesses. Car parking facilities and / or good access to the railway station were considered to be important factors in determining the desirability of office locations.
- 3.17. The quality of office space was not raised as a key concern with most local commercial agents agreeing that landlords were quite flexible on the requirements and rental rates offered to businesses.

Industrial

- 3.18. Local commercial agents consider that there is medium demand for B1c/B2 industrial units from local businesses operating in the Borough. There is considered to be a lack of supply of suitable B1c/B2 stock across the Borough. There is an insufficient supply of employment locations with enough capacity to accommodate additional B1c/B2 industrial uses across the Borough. Local commercial agents consider that additional sites need to be brought forward for B1c/B2 class development, in order to accommodate SME's.
- 3.19. Local commercial agents identified that leasing inquiries for B1c/B2 industrial space tended to be for units up to 190 sqm primarily and over 1,000 sqm for B8 warehousing from local businesses. Typically demand was in large warehousing and small light industrial space which was confirmed by the EGI market data reflecting a lack of available properties in this category. Local commercial agents identified that locally businesses are looking beyond the Borough at Harlow, Stevenage and further north to Letchworth.

Conclusion

- 3.20. The volume of commercial investment transactions for employment premises (B use class) has been fairly limited in the context of recession with 8 transactions between 2012 and 2014. For the same period there has been a relatively low stream of leasing activity with 31 recorded transactions within the Borough.
- 3.21. By comparing rent levels between Haringey and competing centres it has been possible to position the Borough within the wider office and industrial market. In terms of office and industrial rents in Haringey, it is most similar to Enfield.
- 3.22. Haringey's industrial market is considered to be constrained by a lack of flexible industrial premises that can accommodate SME's. The number of leasing transactions was higher for industrial space (26 transactions) when compared to office (5 transactions). Local commercial agents confirmed that there was minimal demand for larger office space, while most of the remaining demand was from smaller local businesses around Haringey.
- 3.23. The majority of actively marketed B-class commercial floorspace is concentrated in the industrial market (B1, B2 & B8 use classes), which has a 79% share of the total stock, followed by the office market with an 11% share. Local commercial agents noted there was demand for light industrial business units (B1c/B2 use classes) which was confirmed by EGI data that showed a lack of availability of marketed space in this category (9%).
- 3.24. Analysis of EGI market data showed that 80% of the marketed B-class stock was second hand grade-B, which may limit the options and flexibility offered to potential businesses looking to invest in the Borough. Local commercial agents agreed that the flexibility of premises to accommodate a mix of uses (light industrial with supporting office uses) was a major decision criteria. In addition, local commercial agents acknowledged that local businesses looking to expand were looking beyond the Borough towards Hertfordshire, which is considered to be offering better quality, availability and location for light industrial B class premises.

4. Stakeholder consultation

Introduction

- 4.1. This section summarises the key findings of the stakeholder consultation undertaken as part of this study. A consultation event was held in Haringey in May 2014 to discuss local employment land issues and to inform the findings of this study.
- 4.2. The consultation event was attended by stakeholders representing Haringey Borough Council, and local businesses and property agents active in the area. The purpose of the consultation event was to capture local perspectives on Haringey's economic growth prospects, challenges and opportunities and their implications for the supply and demand for employment land and premises.
- 4.3. It should be noted that the consultation feedback discussed in this section reflects the views of the stakeholders that expressed it and does not necessarily coincide with the views of Haringey Borough Council or the Consultants undertaking the Employment Land Review.

Existing situation

- 4.4. Stakeholders expressed their view that Haringey is experiencing low levels of demand for office floorspace. Stakeholders considered that as an outer London Borough Haringey is not able to compete with the attraction of the Central London office market, with demand for large office accommodation focusing on the West End / City and increasingly the Stratford / Thames Valley area.
- 4.5. Haringey, therefore experiences a low level of churn in small office requirements, mainly for serviced accommodation (e.g. with broadband provision) from local businesses. The recent changes to Permitted Development Rights (PDR) are encouraging an increase in office to residential conversions that command higher returns to developers.
- 4.6. In the industrial market there is higher demand but there is limited churn, due to the limited choice of vacant premises in conjunction with high costs associated with moving locations. Many local industrial businesses are staying put in their current premises but may be displaced in the future as premises are released for other non B class uses.
- 4.7. Stakeholders noted that some industrial estates (particularly in the East) are at risk of being converted to alternative uses. This is evidenced with Crusader Industrial Premises not providing leases of more than 5 years, which indicates that the landowner may have other intentions for the site's future use.
- 4.8. Industrial market demand is mainly for warehousing premises (B8), between 1,000 – 1,500 sqm. There is also some demand for smaller B1c / B2 premises for SME's under 185 sqm.
- 4.9. Competition in the B1c / B2 market is mainly from Harlow, Stevenage and further north to Letchworth that provide a greater variety and affordability of premises. Affordability of premises is crucial for local businesses in Haringey. Typically industrial businesses are seeking rents below £70 / £80 per sqm.

Type of B-use class demand

- 4.10. Stakeholders identified a clear lack of new B class development coming forward in recent years and limited supply within the existing protected employment areas. They suggested there is demand for new site allocations for B class uses that could be accommodated in the north east of the Borough, which benefits from good strategic transport connections.
- 4.11. Stakeholders expressed the view that current and future demand for premises is generated mainly by B8 floorspace for warehousing (over 1,000 sqm) and B1c/B2 (140 – 185 sqm) for small and medium sized enterprises (SME's). Increasing internet shopping trends are affecting the type of demand for warehousing employment premises and this trend is likely to increase in the future.

- 4.12. Good access for industrial and warehousing is key. Industrial businesses (B1c / B2) require this as they may receive deliveries from articulated vehicles once or twice week.

Policy issues

- 4.13. It was suggested that new high density industrial development (e.g. stacked workspace), although stakeholders considered that this approach could be a bit experimental for the Borough as the concept has been successfully in global city locations e.g. Hong Kong
- 4.14. Stakeholders expressed that planning policy could be developed that applies a mix of uses with no net loss of B class uses. Although there was concern that new industrial development often functions better in clusters and there could be operational issues (e.g. 24 hour working) that could impact on residential development.
- 4.15. Viability is a key issue in the delivery of new industrial premises. It was suggested that S106 / CIL contributions could be directed towards the creation of affordable industrial units.

Opportunities and constraints for future growth

- 4.16. The north east of the Borough provides a good strategic location for accommodating new development due to good transport connections (proximity to the North Circular, Watermead Way and Lee Valley area) and clustering of existing industrial uses. There is potential to accommodate the large warehousing premises that are in demand.
- 4.17. Future growth in Haringey is also likely to come from small and medium sized businesses. In terms of future opportunities, Haringey has the opportunity to develop creative clusters / quarters (similar successes seen with Hackney's creative clusters). There is demand from SMEs for affordable workspace, particularly in the south of Borough.
- 4.18. Any new employment sites need to have flexibility in order to be able to respond to future business requirements. Employment sites also need to be affordable to the local businesses operating in the Borough, otherwise these businesses may relocate to other competing centres in Hertfordshire and beyond.

Conclusions and implications

- 4.19. The views expressed in the stakeholder consultation suggest there is strong demand for industrial and warehousing floorspace which is constrained by the limited available supply. Much of the demand for employment floorspace originates from SME's requiring small, affordable industrial units and local businesses requiring larger warehousing premises. The implication of the above is that Haringey needs to safeguard its existing employment sites and identify suitable new employment land in order to meet future needs.
- 4.20. The above offer a valuable local perspective but do not necessarily reflect the employment forecasts produced by Experian (growth in B1a/b and B8 employment, decline in B1c/B2) or the extrapolation of historic employment trends in Haringey (growth in B1a/b employment, decline in B1c/B2 and B8). These forecasts are discussed in detail in Chapter 6.

5. Supply of employment land

Introduction

- 5.1. This chapter provides an overview of the total stock of existing B-class employment land and provides the headline results of the comprehensive review of employment areas and premises within the London Borough of Haringey. The results of this analysis provide the basis upon which to consider how future employment land requirements (detailed in chapter 8) can be met.

Total stock

- 5.2. Valuation Office Agency (VOA) data provides the most recently available details of business units in Haringey Borough that are subject to business rates. The VOA assesses the 1.8 million non-domestic properties in England and Wales that are liable for business rates and collects information on these properties, including the type of property, the location, the floorspace and rateable value. Commercial data sourced from Estates Gazette (EGI) provides details of currently marketed B-class floorspace within the Borough. The two sources of data together allow for the identification of the total stock of B-class employment land within the Borough.
- 5.3. B-class Floorspace located within existing employment areas and other employment areas has been considered. Floorspace within existing employment areas consists of all floorspace located within employment areas outlined in **Table 5-1**. Other employment floorspace is located outside these employment areas.
- 5.4. The VOA data (see **Table 5-1**) identifies that Haringey Borough has 465,544 sqm of B-class use employment floorspace. The majority of this floorspace consists of warehousing & distribution (B8) with a 49% share of total B-class employment floorspace. The next largest share of B-class employment floorspace accommodates light and general industrial (B1c / B2) with a combined 36% share of total B-class employment floorspace. Office development constitutes the smallest share of B-class employment floorspace with a 15% share.

Table 5-1 Total stock of B-class employment land

Location	B1a/b (sqm)	B1c (sqm)	B2 (sqm)	B8 (sqm)	Total (sqm)
Designated Employment Areas	24,401	55,371	52,147	184,834	320,841
Other Employment Areas	43,781	39,508	20,268	40,990	144,547
Total (sqm)	68,182	94,879	72,571	229,912	465,544
Total (%)	15%	20%	16%	49%	100%

Source: Atkins based on VOA and EGI data ³

- 5.5. **Table 5-2** provides an indication of the average size of different B-class premises within Haringey Borough. Average general industrial premises (B2) and warehousing premises (B8) are the largest at 338 sqm and 333 sqm, respectively. The overall average for all premises is 176 sqm. There is little variation in average premises size between existing employment areas and other employment areas.

Table 5-2 Average size of premises (sqm)

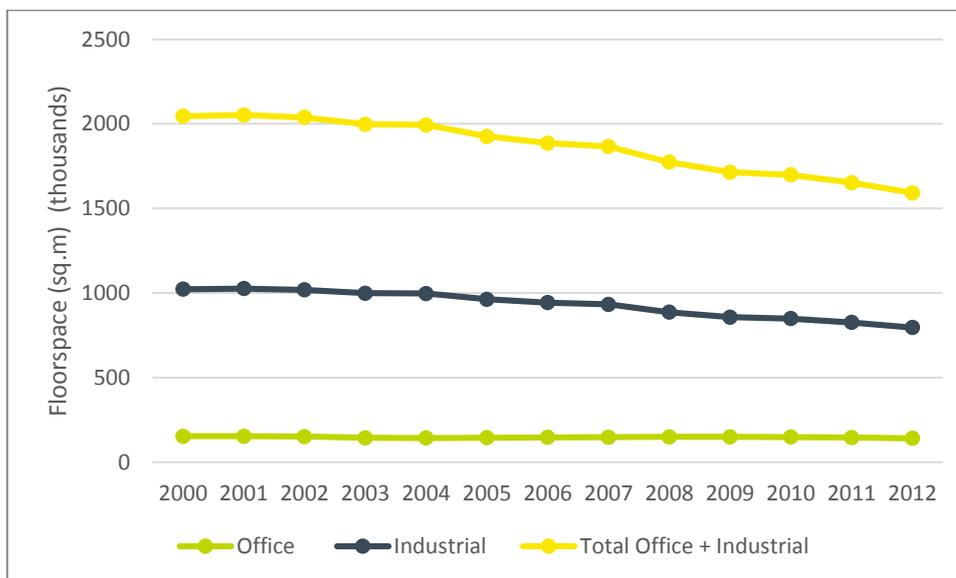
Borough	B1a/b (sqm)	B1c (sqm)	B2 (sqm)	B8 (sqm)	Total (sqm)
Existing Employment Areas	82	103	414	411	228
Other Employment Areas	76	120	230	171	117
Average (sqm)	78	110	338	333	176

Source: Atkins based on VOA data, 2010

³ Floorspace estimates have been made for Site 1 – Woolmer Green North

5.6. **Figure 5-1** presents estimates of total B-class use floorspace in Haringey Borough for the period 2000 to 2012 using Valuation Office Agency (VOA data) latest available data. Office floorspace has been steady for the 12 year period. Industrial floorspace has been declining since 2004. It should be noted that the variation in total floorspace between **Figure 5-1** and **Table 5-1** is as a result of differences in how the VOA experimental data in **Figure 5-1** has been analysed compared to the data in **Table 5-1**. The key differences are: the classification of properties (VOA do not classify by use classes); timing and content of data extracts (Figure 5 relates to VOA data as at 1st April each year); geography (VOA use post code level data); rounding (the experimental data is rounded to the nearest 1,000 sqm).

Figure 5-1 B-class Floorspace in Haringey Borough 2000 to 2012



Source: VOA – Commercial and Industrial Floorspace and Rateable Value Statistics (2000– 2012) Experimental Data.

Existing employment areas

5.7. A total of 22 employment areas were identified by Haringey Council Planning Officers for site assessment. The Defined Employment Areas (DEAs) are identified on the Borough overview map (**Appendix A**).

5.8. **Table 5-3** identifies the distribution of B class employment floorspace across the 22 DEAs. The largest concentrations of floorspace is located at DEA12 and DEA 3 with 42,871 sqm and 45,168 sqm of B class employment floorspace, respectively. In addition to the 320,841 sqm of B-class floorspace located within the existing employment areas assessed by this study there is a further 144,547 sqm of B-class floorspace located in other employment areas. This B-class floorspace amounts to 31% of all B-class floorspace located within Haringey Borough.

Table 5-3 Total Occupied B-class floorspace in existing employment areas

DEA No.	Site Name	Land Area (ha)	Total B-class Floorspace in existing employment areas (sqm)	Percentage Share of Total B-class Floorspace in existing employment areas (%)
DEA1	Crusader Industrial Estate, N15. Ashfield Road	1.6	7,643	2%
DEA2	Bound Green Industrial Estate	5.5	19,248	6%
DEA3	Brantwood Road	16.9	45,168	14%
DEA4	Campsbourne	0.6	2,202	1%
DEA5	Cranford Way	7.9	14,707	5%

DEA No.	Site Name	Land Area (ha)	Total B-class Floorspace in existing employment areas (sqm)	Percentage Share of Total B-class Floorspace in existing employment areas (%)
DEA6	Friern Barnet Sewage Works	6.2	0	0%
DEA7	Hale Wharf	1.7	5,124	2%
DEA8	N17 Studios 784-788 High Road	2.1	278	0%
DEA9	High Road West	2.6	2,748	1%
DEA10	Lindens / Roseberry Works	1.3	4,935	2%
DEA11	Millmead and Ashley Road Extension	11.5	37,000	12%
DEA12	North East Tottenham	15.5	42,871	13%
DEA13	Queen Street	1.6	5,594	2%
DEA14	South Tottenham	9.1	36,225	11%
DEA15	Tottenham Hale	13.2	6,610	2%
DEA16	Vale Road / Tewkesbury Road	6.7	17,771	6%
DEA17	White Hart Lane	8.1	21,558	7%
DEA18	Willoughby Lane	1.1	8,161	3%
DEA19	Wood Green	12.1	38,640	12%
DEA20	High Road East	1.0	0	0%
DEA21	Marsh Lane	2.1	86	0%
DEA22	Rangemoor Road, Herbert Road	3.0	4,273	1%
Total		131.4	320,841	100%

Source: Atkins based on VOA and EGI data

Evaluation of Defined Employment Areas

- 5.9. The assessment of the 22 Defined Employment Areas (DEAs) has been undertaken in accordance with the key criteria set out in the Mayor's Industrial Capacity SPG and the NPPG, as summarised in Chapter 2.
- 5.10. The assessments were based on visual surveys of the sites and are of a qualitative nature. The site assessments considered the following factors and characteristics:
- Location & existing planning designations;
 - Property appraisal - Size, type, age and condition of premises;
 - Access and parking; and
 - Vacancy and scope for change.
- 5.11. Vacancy levels were assessed using a combination of EGI data analysis and the observations made during the visual site surveys.
- 5.12. A map of the DEAs and the recommended designations is presented in Appendix A.

DEA 1 Crusader Industrial Estate

Location and existing planning designations

- 5.13. DEA 1 Crusader Industrial Estate is a Locally Significant Industrial Site (LSIS) providing for a range of industrial uses (B1c/B2 and B8). The site is bounded to the north by the Arena Design Centre and a railway line and to the south by Omega Works, to the west by SINC-designated woodland and to the east by Ashfield Road.

Site appraisal

- 5.14. Access is off Hermitage Road through a security guarded entrance and onsite parking is provided. The site is in close proximity to the strategic road corridor of Green Lanes (A105). The site has good public transport link and is within 5 minutes of a bus stop and within a reasonable walking distance to Haringey Green Lanes and Haringey railway stations.
- 5.15. The site provides a cluster of B class uses and the site is a self-contained industrial estate. DEA 1 provides a mix of buildings that support B8 uses along with small B1 and B2 businesses (e.g. specialist food, clothing). DEA1 has a total of 7,643 sqm of B class commercial floorspace. There are actively marketed premises in DEA1 according to the EGI database with a vacancy rate of 17%. This vacancy rate relates to one large B class unit (1,330 sqm).

The Council is investing in skills provision within the fashion and textiles industry on unit 13 of this site to underpin Haringey's prominent fashion manufacturing cluster. The curriculum provided at the Fashion Academy will provide NVQ level 1 and 2 qualifications in the whole manufacturing cycle, which is a unique service in the UK.

Opportunities for change

- 5.16. DEA1 provides for a variety of employment uses with relatively well functioning B2/B8 space in the centre of the live/work areas. The site also has good public transport links and parking provision.
- 5.17. A Regeneration Area (RA) designation would reflect the mix of uses that already exist on the site and the Council's aspiration to continue change in this area.

DEA 2 Bounds Green Industrial Estate

Location and existing planning designations

- 5.18. DEA 2 Bounds Green Industrial Estate is designated as Employment Land (EL) providing for a range of industrial uses (B1, B1c/B2 and B8). The site is bounded to the north by the North Circular (A406), to the east by Bounds Green Road and to the south and west by a railway line. The estate is self-contained as is accessed via Ring Way.

Site appraisal

- 5.19. DEA 2 provides mainly for B2 uses (e.g. textiles, printing services, stainless steel manufacturing) and B8 uses (e.g. textiles & flooring storage and distribution). The site mainly consists of older, average quality buildings along with some newer B8 class stock. DEA2 has a total of 19,248 sqm of B class commercial floorspace. There are actively marketed premises in DEA2 according to the EGI database and there is a relatively low vacancy rate of 15%.
- 5.20. The site provides adequate on-site parking. The site has good accessibility to public transport as it is located within 5 minutes of a bus stop on Station Road/Bounds Green Road (A109). The Bounds Green and Arnos Grove tube stations and New Southgate Railway Station are with a reasonable walking distance from the site.

Opportunities for change

- 5.21. DEA 2 provides for a variety of B1, B2 and B8 uses, is well located in relation to the highway network, it has good public transport links and parking provision. The site has good occupancy and appears to meet the needs of local businesses. The current EL designation on the site safeguards it as an employment location with a flexibility to accommodate other complementary employment generating sectors beyond traditional B use classes.

DEA 3 Brantwood Road

Location and existing planning designations

- 5.22. DEA 3 Brantwood Road is a Strategic Industrial Location (SIL) providing for a range of industrial uses (B1c/B2 and B8). The site is bounded to the north by Middleham Road and to the south by residential housing, to the west by Grange Road and to the east by a sports ground.

Site appraisal

- 5.23. The site provides a cluster of B class uses and is a self-contained industrial estate. DEA 3 provides a mix of buildings that support mainly B8 uses along with some B1(c)/B2 uses. Access is off Tariff Road and onsite parking is provided. The site is within 5 minutes of a bus stop.
- 5.24. Many of the properties are of average condition and a number are in poorer condition. Investment in the properties to improve the fabric and condition of the buildings is relatively limited. A number of the larger older properties have been sub-divided to enhance the prospects for occupational demand.
- 5.25. The predominant sectors within the Brantwood and Garman Road Estates are cash and carry wholesalers, specialist food stores, food distribution, automotive, building construction, clothing and textiles. Despite the age and condition of many of the properties there appear to be relatively good levels of occupation, reflecting current economic and property market conditions.
- 5.26. DEA12 has a total of 45,168 sqm of B class commercial floorspace. There are actively marketed premises in DEA11 according to the EGI database and there is a very low vacancy rate of 3%.

Opportunities for change

- 5.27. DEA3 provides for a variety of B1c/B2 and B8 uses, has good bus links and parking provision. The existing employment density is relatively high but there is some scope for achieving higher densities, building upon Tottenham's growth sectors and enhancing the light industrial mix, with less warehousing. This would also compliment the Council's training and education agenda.
- 5.28. It is recommended that the site is safeguarded as a Strategic Industrial Location and retains its "industrial" character.

DEA 4 Campsbourne

Location and existing planning designations

- 5.29. DEA 4 Campsbourne is designated as a Regeneration Area (RA). The site is bound to the west by Cross Lane, to the east by Chadwell Lane, to the north by New River Avenue and to the south by High Street. The site DEA 4 has good public transport links as it is within 5 minutes of a bus stop on High Street (A504) and is close to Hornsey Railway Station.

Site appraisal

- 5.30. DEA 4 provides for mainly B2 (e.g. workshops), B8 uses (e.g. storage) and Sui Generis (e.g. garage / car repair services). The overall quality of the site and premises is rather poor but the site appears to be fully occupied. DEA4 has a total of 2,202 sqm of B class commercial floorspace and there are no actively marketed premises according to the EGI database.
- 5.31. DEA 4 has good accessibility to public transport as it is located within 5 minutes of a bus stop on High Street (A504) and close to Hornsey Railway Station. However, vehicular access via Cross Lane could be improved, as this route is narrow and lacks appropriate signage. Parking provision is limited.

Opportunities for change

- 5.32. Planning consent has been granted for mixed use development (new homes and a super market) at the Hornsey Depot site. The site's Regeneration Area designation is considered appropriate and in line with Haringey Council's long-term ambitions for the regeneration of the area.

DEA 5 Cranford Way

Location and existing planning designations

- 5.33. Site DEA 5 Cranford Way is a Locally Significant Industrial Site (LSIS) providing for a range of industrial uses (mainly B8). The site is bounded to the north by Tottenham Lane (A103), to the south by Chettle Court, to the west by Uplands Road and to the east by a railway line.

- 5.34. DEA5 is within a 5 minute walk of Hornsey overground railway station and provides services to Kings Cross/Moorgate via Finsbury Park.

Site appraisal

- 5.35. The site provides a cluster of B class uses and the site is self-contained industrial estate. DEA 5 provides a mix of buildings that support mainly B8 uses along with some /B2 uses, which are generally of a good quality. The site accommodates a variety of business (e.g. marble, Fedex). Internal circulation at the site is good and parking is provided onsite.

- 5.36. Most of the buildings are only suitable for storage uses and attract low to medium value investors. DEA5 has a total of 14,707 sqm of B class commercial floorspace. There are actively marketed premises in DEA5 according to the EGI database and the vacancy rate is 21%.

Opportunities for change

- 5.37. The site currently supports low to medium value uses across the site across a range of B class uses. The site has higher than average vacancy levels which suggest the need for improvements that will make it more attractive to businesses. The current LSIS designation on the site safeguards the existing B class uses and is considered appropriate.

DEA 6 Friern Barnet Sewage Works

Location and existing planning designations

- 5.38. Site DEA 6 Friern Barnet Sewage Works is designated as Employment Land (EL) and is currently vacant / derelict. The site is bounded to the north and east by the A406 and a railway line respectively. There is a park / playground to the west of the site and a golf course to the south.

Site appraisal

- 5.39. The site has a dual designation as it is also identified as a Site of Importance for Nature Conservation (SINC). The site is currently derelict / vacant, enclosed by fence and is known to be contaminated in places given its former use as sewage treatment works. There is evidence of overgrown vegetation and flytipping.

The site is located immediately adjacent to the North Circular Road (A406) and is accessed directly from this major arterial route via a junction with the B550 approximately 200 metres to the west.

Opportunities for change

- 5.40. The site has been vacant / derelict for many years reflecting the difficulties in bringing it forward for development. It appears unlikely that this is going to change in the short to medium term as there are various factors affecting the site's prospects of being developed (such as the site's contamination and the corresponding land remediation costs).
- 5.41. Given that both the Experian and trend-based employment projections indicate that future employment growth in Haringey will be primarily in office-based sectors, the site does not appear to be an attractive B1 location. It is not close to any London Underground stations and the nearest railway station (New Southgate) is approximately 15 minutes away on foot. Taking the above into account along with the site's land contamination issues and its long history being vacant / derelict it does not appear to be likely to be developed for employment use in the near future.
- 5.42. A study should be undertaken to determine the feasibility and viability of the site for re-development for employment use. It is possible that employment-led development could be unfeasible because of land remediation costs. This raises the possibility that some form of cross subsidy will be required in order to bring the land forward for development.
- 5.43. Subject to the findings of a detailed feasibility assessment, it is recommended that the site should be retained as employment land, if it is assessed to be viable for employment development once nature conservation issues have been suitably mitigated. If unviable, cross subsidy for development could be considered to deliver employment functions.

DEA 7 Hale Wharf

Location and existing planning designations

- 5.44. DEA 7 Hale Wharf is designated as a Regeneration Area (RA) providing for a range of industrial uses (B1a, B1c/B2 and B8). The site is bounded to the north and west by the River Lea, to the south by Ferry Lane, to the west by housing and to the east by The Paddock Community Park. The site is accessed off Ferry Lane. Internal circulation at DEA7 is good and onsite parking is provided.

Site appraisal

- 5.45. DEA 7 provides a mix of buildings that support mainly B8 uses along with some B1c/B2 uses, which are generally of a good quality and older age. Most of the buildings are only suitable for storage uses and attract low to medium value investors. DEA7 has a total of 5,124 sqm of B class commercial floorspace. There are no actively marketed premises in DEA7 according to the EGI database.

Opportunities for change

- 5.46. The site is close to very good transport links and close to Hale Village, a major residential development. It is located next to Lee Valley Regional Park and abuts the River Lee and will be directly located on the emerging green link which will open up both the park and Walthamstow Wetlands to Tottenham's community. Hale Wharf is located within the Tottenham Hale housing zone priority area and is in close proximity to the emerging Tottenham Hale District Centre.
- 5.47. By taking into consideration all of the above, the existing designation as RA (Regeneration Area) is appropriate as it grants the site flexibility to contribute to the area's regeneration initiatives. However as the Borough cannot afford to lose any of its existing B use class jobs it is vital that the potential for any B use class jobs affected are either re-located to new suitable premises or to existing employment sites that have the potential for further intensification. There is also potential for some small workspace provision as part of comprehensive mixed use development.

DEA 8 N17 Studios 784 – 788 High Road

Location and existing planning designations

- 5.48. DEA 8 N17 Studios 784 – 788 is designated as Employment Land (EL) providing for office uses (B1a). The site is bounded to the north by a Sainsbury's super market (Northumberland Park), to the east by Worcester Avenue, to the west by the High Road and to the south by Paxton Road. The site is accessed from the High Road and there is no on-site parking provided.

Site appraisal

- 5.49. There are some buildings containing office uses fronting onto the High Road. Behind these buildings the land is vacant and construction work is taking place. DEA8 has limited B class floorspace with around 278 sqm. There are no actively marketed premises in DEA 8 according to the EGI database.

Opportunities for change

- 5.50. The estate is part of the Tottenham Hotspur development and has the corresponding planning permission. A supermarket was recently developed upon part of the site and CPO procedures are already in place. Reflecting the above, the site will be de-allocated.

DEA 9 High Road West

Location and existing planning designations

- 5.51. Site DEA 9 High Road West is a Locally Significant Industrial Site (LSIS) providing for a range of industrial uses (B2). The site is bounded to the north by Langhedge Close and to the south by White Hart Lane, to the west by Pretoria Road and to the east by the High Road.

Site appraisal

- 5.52. The northern portion of the site (Brook House) is being developed for housing. This replaces the four industrial buildings that were last occupied by a rubber manufacturing company.
- 5.53. The southern section of DEA 9 consists of the Peacock Industrial Estate providing for mainly B2 (e.g. supplies of car tyres / gearboxes, bathrooms and metal workshops) and Sui Generis uses

(e.g. car maintenance services). The overall quality of buildings and landscape is rather poor but the site is well occupied and has reasonable accessibility and parking provision.

5.54. There is a large supermarket that separates the southern and northern parts of the DEA. In addition there is a concentration of retail activity and key services fronting onto the High Road.

5.55. DEA9 has a total of 2,748 sqm of B class commercial floorspace. There are actively marketed premises on the site according to the EGI data and there is a vacancy rate of 6%. The site has good internal circulation and parking is available onsite.

Opportunities for change

5.56. DEA9 has good public transport links and parking provision. The site is well occupied and is therefore serving the needs of local businesses. In that respect, the current LSIS designation is appropriate for the site as it safeguards B class uses (including Bb/B1c, B2 and B8). However, there are important plans for the redevelopment of the site as part of the wider plan for the regeneration of Tottenham. These are outlined in the “*Upper Lee Valley Opportunity Area Planning Framework*” and Haringey Council’s “*High Road West: Creating a plan for change*”. Improving north Tottenham is a priority for the Council and the site could play an important role in making the area a more attractive place to live, work and recreate.

5.57. By taking into consideration all of the above, it is recommended that the site is designated as Local Employment Site - Regeneration Area to grant it the flexibility to contribute to the area’s important regeneration initiative. However as the Borough cannot afford to lose any of its existing B use class jobs it is vital that any B use class jobs affected are either re-located to new suitable premises or to existing employment sites that have the potential for further intensification.

DEA 10 Lindens / Rosebery Works

Location and existing planning designations

5.58. DEA 10 Lindens / Rosebery Works is a Locally Significant Industrial Site (LSIS) providing for a range of industrial uses (B1c/B2 and B8). The site is bounded to the north by housing and to the south by Park View Road, to the west by Hanbury Road and to the east by a railway line. The site is accessed from Rosebery Avenue.

Site appraisal

5.59. The site provides a cluster of B class uses and the site is self-contained industrial estate. DEA 10 provides a mix of buildings that support mainly B8 uses along with some B1(c)/B2 uses, which are generally of a good quality and old (more than 20 years). Most of the buildings are only suitable for storage uses and attract low to medium value investors. Internal circulation at the site is good and parking is available onsite.

5.60. DEA10 has a total of 4,935 sqm of B class commercial floorspace. There are no actively marketed premises on the site according to the EGI database.

Opportunities for change

The site currently supports low to medium value uses across the site across a range of B class uses. DEA10 and has good public transport links and parking provision. The current LSIS designation is appropriate for the site as it safeguards B class uses (including B1b, B1c/B2 and B8).

DEA 11 Millmead and Ashley Road

Location and existing planning designations

5.61. DEA 11 is composed of two sites. The eastern part of the site (DEA11 Millmead) is designated as a Strategic Industrial Location (SIL). The site to the west of the railway line (DEA11a Ashley Road) is designated as a Regeneration Area (RA).

5.62. The site has a good level of accessibility and is within 5 minutes of a bus stop on Watermead Way (A1055). Tottenham Hale and Seven Sisters stations are within walking distance from the site.

Site appraisal

- 5.63. DEA 11 (both sites) provides around 37,000 sqm of floorspace. The old Technopark building which predominantly housed small B1 use class business (graphic designers, solicitors, IT offices) has recently been converted into a new school. The east side of DEA11a provides land and outbuildings for Network Rail on the strip of land between the railway and Watermead Way, which fall under the Sui Generis use class.

Opportunities for change

- 5.64. At DEA 11 maintaining and enhancing existing industrial employment land on Millmead and Lockwood Estates will maintain the area's flexibility to respond to ongoing changes in employment demand. Achievement of the aspirations for this area is likely to happen incrementally and over a sustained period. Given this context, in the short term the focus should be on organic growth and renewal and in the long term to a more mixed development scenario which encourages larger B2 class business uses. However there could be scope in selected areas for more intensive B1 class uses. There could also be long term potential for new incubator/accelerator as the 'environment' changes given links via Tottenham Hale to King's Cross/Cambridge.
- 5.65. It is recommended that DEA 11 should be maintained as a Strategic Industrial Location (SIL) designation. DEA 11a performs a different function and a Regeneration Area designation is in line with the proposals set out in the Tottenham Hale Masterplan.

DEA 12 North East Tottenham

Location and existing planning designations

- 5.66. DEA 12 North East Tottenham is designated as a Strategic Industrial Location (SIL) providing for a range of industrial uses (B1c/B2 and B8). The site is bounded to the north by a Leaside Road and to the south by Marigold Road, to the west by a railway line and to the east by Watermead Way and Tottenham Marshes.

Site appraisal

- 5.67. DEA 12 provides a mix of buildings that support mainly B8 uses along with some B1(c)/B2 uses, which are generally of a good quality and old (more than 20 years). Most of the buildings are only suitable for storage uses and attract low to medium value investors. The site has good internal circulation and parking is available onsite.
- 5.68. DEA12 has a total of 42,871 sqm of B class commercial floorspace. There are actively marketed premises in DEA12 according to the EGI database and there is a vacancy rate of 6%.

Opportunities for change

- 5.69. The site currently supports low to medium value uses across the site across a range of B class uses but is well occupied. It is recommended that the site is protected as a Strategic Industrial Location (SIL).

DEA 13 Queen Street

Location and existing planning designations

- 5.70. DEA 13 Queen Street is designated as a Locally Significant Industrial Location (LSIS) and is a self-contained industrial estate providing for a range of industrial uses (B1c and B8). The site is bound to the north by a sports ground and to the west by a school and to the east by Queens Street. There are some residential properties to the south of the DEA 13 boundary, however, the existing B class uses do not appear to be to the detriment to the amenity of the area.

Site appraisal

- 5.71. The east side of DEA 13 provides a cluster of small units supporting small B1 and B2 use class businesses (e.g. specialist food, clothing, glass and ceramic business). The west side of the site provides large warehousing for B8 uses and is occupied by a single occupier.
- 5.72. DEA 13 has a good level of accessibility and on-site parking. The west side of the DEA provides spacious premises for B8 uses with good access and parking facilities. The east side of the DEA provides for smaller business with basic units, which appear to be fully occupied. DEA13 has a total of 5,594 sqm of B class commercial floorspace.
- 5.73. There are no actively marketed premises in DEA13 according to the EGI database.

Opportunities for change

- 5.74. The site currently supports low to medium value uses across the site across a range of B class uses. The site is fully occupied which suggests strong levels of demand. The current LSIS designation is considered to be appropriate for the site as it safeguards B class uses.

DEA 14 South Tottenham

Location and existing planning designations

- 5.75. Site DEA 14 South Tottenham is a Locally Significant Industrial Site (LSIS) providing for a range of industrial uses (B1a, B1c/B2 and B8). Tottenham Hale Retail Park is located to the north of DEA 14. There could be potential opportunity to capitalise on the success of the Retail Park by providing more flexibility in land uses. DEA 14 has a good level of accessibility. It is within 5 minutes of a bus stop on Broad Lane and Tottenham Road (A10). The Tottenham Hale tube and railway station and the Seven Sisters tube stations are with a reasonable walking distance from the site.

Site appraisal

- 5.76. DEA 14 provides for a wide variety of B use classes, of varying age and quality. It is a microcosm of Tottenham's diversity, with a rich mix of business types, building stock and demographics contained within a small geographic area. The mix of uses is characterised by a strong presence of food manufacturers, catering & construction companies, waste & recycling operators. Like much of Tottenham, it occupies a clear niche as a servicing and supply function in the London market.
- 5.77. The northern part of the DEA borders the Tottenham Hale Retail Park which is a major site allocation. It provides newer, good quality units for mainly B1 (offices) and B2 (SME workshops) uses is well-occupied. The southern part of the site, which accommodates older units and B2 and B8 activities, appears to have higher vacancy rates.
- 5.78. DEA14 has approximately 36,000 sqm of B class commercial floorspace. There are actively marketed premises in DEA14 according to the EGI database and the vacancy rate is 8%.
- 5.79. The site provides an average level of parking, which is provided mainly on internal roads and within some individual site boundaries. There appear to be no conflicts with surrounding land uses.

Opportunities for change

- 5.80. The majority of the businesses within the area are traditional manufacturing, warehousing and wholesale businesses, and qualify as micro-enterprise (0-4 FTE). There are some high-end businesses including a military uniform maker, high end mannequin maker, stone restorer and organic food trader.
- 5.81. DEA 14 should continue to provide a mixed employment led offer with organic improvement as well as specific interventions to provide upgraded workspaces, some potential for effective Warehouse living and managed hub facilities to support the growth of an emerging creative quarter. Warehouse living could be acceptable on the western edge of this DEA (along Stanford Road) as a way of transitioning the change from residential to employment areas. Any Warehouse living provision should be part of a scheme whose primary function should be to provide workspace and the actual use of live/work units should be monitored and enforced to ensure they are not converted to purely residential units.
- 5.82. Based on the above, it is recommended that the clear majority of the site maintains its LSIS designation to reflect and protect the range of B class and other complimentary uses in the area. However, it is anticipated that this area will come under pressure to change further given the scale of change in Tottenham Hale. Whilst the DEA is performing well the Council is seeing conversions to residential use, with an influx of young, single 'creative' demographic gradually replacing traditional businesses in Fountayne Road and Markfield Road.
- 5.83. It is therefore recommended that the western edge of the DEA, and a part of the site on the east side (as shown in Appendix A), are re-designated as Local Employment Areas – Regeneration Areas.

DEA 15 Tottenham Hale

Location and existing planning designations

- 5.84. DEA 15 Tottenham Hale is designated as a Strategic Industrial Location (SIL) and Regeneration Area (RA). The northern part of the site accommodates older units for a range of B class uses (including B1a, B2 and B8). The southern part of the site (Station Road) accommodates a wide variety of office, retail, Sui Generis uses.
- 5.85. The site is bounded to the north by DEA 11 (LEA 11a), to the east by a railway line and to the south by Tottenham Hale Retail Park and to the west by the Hale.

Site appraisal

- 5.86. DEA15 provides a variety of office (B1a) and industrial uses (B1c/B2) and Tottenham Hale tube station. DEA 15 has a total of 6,610 sqm of B class commercial floorspace. The majority of B class floorspace is concentrated in the north of the site. Office premises are generally of an average and industrial / sui generis uses are of a poorer quality. There are no actively marketed premises in DEA15 according to the EGI data.
- 5.87. There is considerable new non-B class development present in the south of the site in the form of a cluster of retail premises (Pizza Hut, Maplin, KFC) located on Station Road.
- 5.88. In addition, a commercial building, known as Image House located on Station Road is set to be demolished. A new nine-storey Premier Inn hotel is planned to be developed, following approval by the council's planning committee on 7th April 2014. The new mixed use development is attributed to the Council's focus on regenerating the Tottenham area.

Opportunities for change

- 5.89. The site currently supports low to medium value uses across a range of B class uses. It also accommodates a significant amount of non B class uses and it is anticipated that this area will change further given the Council's focus on regenerating Tottenham. Based on the above, it is recommended that the southern part of the site (the "island" between Ferry Lane, the Hale and Hale Road) is de-allocated. A Regeneration Area designation would be appropriate for the rest of the site.

DEA 16 Vale Road / Tewkesbury Road

Location and existing planning designations

- 5.90. DEA 16 Vale Road / Tewkesbury Road is a Locally Significant Industrial Location (LSIS) providing for a range of industrial uses (B1c/B2 and B8). The site is bounded to the north by Hermitage Road and to the south by Eade Road, to the west by housing and to the east by Overbury and Tiverton Road. National Grid is undertaking temporary shaft and tunnelling works on part of the site adjacent to Eade Road.

Site appraisal

- 5.91. There is considerable unplanned, unlicensed occupation of parts of the site (around Overbury/Eade Rds and at Chilli Works). Significant swathes of the site are still in active employment use however and should be protected for ongoing employment use. DEA 16 has a total of 17,771⁴ sqm of B class commercial floorspace. There are no actively marketed premises in DEA16 according to the EGI database.
- 5.92. The site has good public transport access as Manor House, Seven Sisters and Stamford Hill stations are all less than 15 minutes' walk from the site, and the site is also served by regular bus services. Furthermore, internal circulation at the site is good and parking is provided onsite. The above create the potential for enhanced employment outcomes on the site.

Opportunities for change

- 5.93. The site currently supports low to medium value uses across a range of B class uses and is well occupied. It also has a considerable number of unplanned warehouse living units. The redevelopment of Woodberry Down across the new river, is expected to increase land values in

⁴ This calculation accounts for total B class (office/factory/industrial) employment floorspace. This takes the total existing floorspace that is currently occupied by B class businesses (recorded in the VOA data) and adds this to the total vacant B class floorspace (recorded in the EGI data).

the area and therefore the differential between the existing use value and the alternative use value.

- 5.94. The site has potential for new studio/workshop and warehouse living as part of a high quality conversion of the existing Victorian factory building. It is recommended that the central part of the site is protected as a Locally Significant Industrial Location while the eastern and western parts (as shown in Appendix A) are designated as Regeneration Areas to reflect the existing mix of uses on the site and the Council's aspiration to continue change in the area.

DEA 17 White Hart Lane

Location and existing planning designations

- 5.95. Site DEA 17 White Hart Lane is a Locally Significant Industrial Site (LSIS) providing for warehousing premises (B8). The site is bounded to the north and east by housing and to the south by White Hart Lane, to the west by housing and to the west by a Sports and Recreation Centre.

Site appraisal

- 5.96. DEA 17 provides for mainly B8 uses, such as self-storage warehousing. There is a petrol station on site, which fall under the Sui Generis use class. A new industrial development is currently under construction that will provide for units for a mixture of B2 and B8 uses.
- 5.97. The site provides premises that are of a good quality and age and has a good level of accessibility and parking provision. The east side of the site accommodates a builders' yard that faces onto the back of residential gardens (located at Devonshire Gardens). The residential properties may be affected by dust from the builders' yard, which contains a large mound of soils/raw materials.
- 5.98. DEA 17 has a total of 21,558 sqm of B class commercial floorspace. There are actively marketed premises in DEA17 according to the EGI database and a vacancy rate of 17%. This accounts for 3 warehousing premises (combined total of 3,659 sqm). There is a vacant/derelict site advertised for sale on the eastern boundary.

Opportunities for change

- 5.99. DEA 17 provides good quality warehousing premises. There is a vacant / derelict site advertised for sale that has the potential to provide new B class development. The current LSIS designation is appropriate for the site as it safeguards B class uses.

DEA 18 Willoughby Lane

Location and existing planning designations

- 5.100. DEA 18 Willoughby Lane is a Local Employment Area (Regeneration Area -RA) providing for a range of industrial uses (B1a, B1c/B2 and B8). The site is within 5 minutes of a bus stop on Willoughby Lane. The Northumberland Park Railway Station is with a reasonable walking distance from the site.

Site appraisal

- 5.101. DEA 18 provides for a wide variety of B1a, B1c/B2, B8 and sui generis uses, including offices, metal shops, poor quality sheds and MOT / car services. There is a row of three storey buildings (fronting onto Willoughby Lane) that provide ground floor retail uses with residential and office units occupying the remaining levels.
- 5.102. DEA 18 is well occupied and appears to have no vacant units. The office accommodation (Imperial House) is of average quality. The quality of the light industrial workshop units is of a poor age and quality. DEA 18 has a total of 8,161 sqm of B class commercial floorspace. There are no actively marketed premises in DEA18 according to the EGI database.

Opportunities for change

DEA 18 is well occupied and provides a mixture of B class uses. It is recommended that the site is designated as Locally Significant Industrial Site (LSIS) to better protect it for employment use.

DEA 19 Wood Green

Location and existing planning designations

- 5.103. DEA 19 Wood Green is a Local Employment Area / Regeneration Area (RA) to the north by Wood Green Common and to the south by Gas Holder Station, to the west by a railway line and to the east by housing.
- 5.104. The site has a good level of accessibility. It is within 5 minutes of a bus stop on Wood Green High Road (A105). The Wood Green Underground Station and Alexandra Palace Railway Station are within walking distance from the site. It is also located between two identified future Crossrail 2 stations.

Site appraisal

- 5.105. DEA 19 currently accommodates D use class activities, including D1 (e.g. Language School, Theatre Academy) and D2 (e.g. Gym, Martial Arts Training, Children's Play Centre). There are also some B use class activities, including B8 uses (e.g. Furniture Warehouse) and B1 uses (e.g. clothing factory, chocolate factory).
- 5.106. The area is also designated as a cultural quarter in the Local Plan: Strategies Policies (2013). DEA 19 has a total of 38,640 sqm of B class commercial floorspace. There are actively marketed premises in DEA19 according to the EGI database with a vacancy rate of 4%.

Opportunities for change

- 5.107. DEA 19 is well-occupied, provides good transport links and is in close proximity to the local centre of Wood Green. It currently provides for a mix of D and B class uses. There is opportunity for small office/workspace and the expansion of the creative quarter concept through the expansion of managed workspace. Its location in a growth area makes the designation of Regeneration Area (RA) appropriate.

DEA 20 High Road East

Location and existing planning designations

- 5.108. DEA 20 High Road East is designated as Employment Land (EL) providing for a range of industrial uses (B1b/c, B2 and B8). The site is bounded to the north by a railway line and to the south by Hermitage Road, to the west by housing and to the east by Ashfield Road.

Site appraisal

- 5.109. The site provides a cluster of B class uses and the site is self-contained industrial estate. Mixed use (residential / retail) buildings front onto the High Road. To the rear of these buildings is a new Sainsbury's super-market that has been developed as part of the stadium regeneration project.
- 5.110. Premises fronting onto the High Road accommodate residential and retail, there may be an office element, however this was not clearly observed during the site visit. There does not appear to be any B class uses within the site according to the review of VOA and EGI data.⁵ There is no onsite parking.

Opportunities for change

- 5.111. The majority of the site is occupied by retail (Sainsbury's) and the remainder comprises mainly mixed use (residential / retail). The site currently supports a very limited supply of office floorspace. Office floorspace fronting onto the High Road should be protected but given the range of uses on the site, a Regeneration Area designation is considered appropriate.

DEA 21 Marsh Lane

Location and existing planning designations

- 5.112. DEA 21 Marsh Lane is designated as a Strategic Industrial Location (SIL) and currently operates as a bus depot. The site is bounded to the north by allotment gardens and Marigold Road, to the south and west by railway carriage sheds and to the east by Tottenham Marshes. The site is accessed via Marsh Lane and there is parking on site for buses and vehicles.

Site appraisal

- 5.113. The site performs the function of a bus vehicle depot and DEA 21 has a total of 86 sqm of B8 class commercial floorspace.

Opportunities for change

- 5.114. Marsh Lane forms part of the North Tottenham employment area which also includes Brantwood, Garman and Leaside Industrial Estates and Imperial House Business Centre. These sites are located within Central Leaside which is designated as a Strategic Industrial Location (SIL).

- 5.115. In the short to medium term no substantive change is recommended for the North Tottenham employment areas. Generally the estates are operating at a high level of occupancy and provide for a range of sectors that serve primarily B2B functions and which benefit from their proximity to central London.

- 5.116. DEA 21 is in operation as a bus vehicle depot and should remain as designated as a Strategic Industrial Location (SIL).

DEA 22 Rangemoor Road, Herbert Road

Location and existing planning designations

- 5.117. DEA 22 Rangemoor Road, Herbert Road is designated as a Regeneration Area providing for a range of industrial uses (B1c/B2 and B8). The site is bounded to the north by Herbert Road and to the south by a railway line, to the west by Wakefield Road and to the east by Ashby Road.

Site appraisal

- 5.118. DEA 22 is an industrial estate occupied by mainly a mixture of B2 (e.g. plumbing and heating, furniture manufacturing) and B8 uses (e.g. clothing storage and distribution, food wholesalers, removals). The Rangemoor Road area includes some newer industrial properties, with a significant proportion developed in the 1980s and 1990s by the Council. The Rangemoor Road Industrial area is closely integrated with the surrounding residential land uses.

- 5.119. DEA 22 has a total of 4,273 sqm of B class commercial floorspace. There are no actively marketed premises in DEA 22 according to the EGI database.

- 5.120. Based on a visual site survey and analysis of EG data, the site has a medium-high vacancy level, including a vacant large warehouse and vacant workshop premises. The DEA provides a mixture of newer and older units of poor to average quality. There is some evidence of fly tipping on parts of the site and the road surface is in poor condition. Adjacent to the northern DEA boundary along Herbert Road are new housing units. One of the housing units has been converted to support a workshop business

- 5.121. The site has reasonable accessibility and provides an average level of parking, which is provided within the estate on the internal roads. However, the internal roads within the site may need resurfacing due to a number of pot holes.

Opportunities for change

- 5.122. Rangemoor Road/Herbert Road is expected to continue to provide a mixed, employment-led offer with organic improvement as well as specific interventions to provide upgraded workspaces, some potential for new residential infill development adjacent to existing residential areas and community schools.

- 5.123. The site presents a major opportunity for a mix of uses to be introduced with a strong employment lead – likely to attract warehouse living, co-working and small studios.

- 5.124. In the long term, the Council has ambitions to strengthen creative industries in the area. Intensification of B1 and B2 use class uses would be compatible with aspirations for residential-led redevelopment on some sites whilst ensuring good quality employment space provision. It is recommended that the boundaries of the site are amended (as shown in Appendix A) and the smaller site maintains its Regeneration Area status.

Sources of employment floorspace supply

- 5.125. The Borough has a number of potential sources that could bring forward new employment floorspace, as follows:

Vacant floorspace

- 5.126. Vacant floorspace refers to vacant premises which are marketed (vacant land is considered below). The EGI availability data has been analysed to give an indication of the current availability of B-class floorspace. **Table 5-4** identifies the amount of vacant floorspace in the Borough including all vacant floorspace that appears in the EGI database. It should be noted that there may be other floorspace currently available that is not currently being marketed.
- 5.127. Site work undertaken as part of this study also identified vacant B-class floorspace within premises where this was advertised. The largest proportion of vacant B-class floorspace within premises which was identified during employment land appraisals was within Sites DEA14, DEA17 and DEA5.
- 5.128. **Table 5-4** presents EGI data and VOA data. The EGI data identified that Haringey has over 29,669 sqm of B-class floorspace that is being actively marketed; the majority of that is in B2 use class with some 12,147 sqm and followed by B8 (11,422 sqm). Vacancy rates have been identified by calculating vacant floorspace as a percentage of total B-class floorspace.
- 5.129. There is currently a vacancy rate of 6% across all B-class floorspace in the Borough, which is considered to be an acceptable level of vacancy which allows for churn and the efficient operation of the market. The highest vacancy concentration is in B2 use classes with a vacancy rate of 17%.

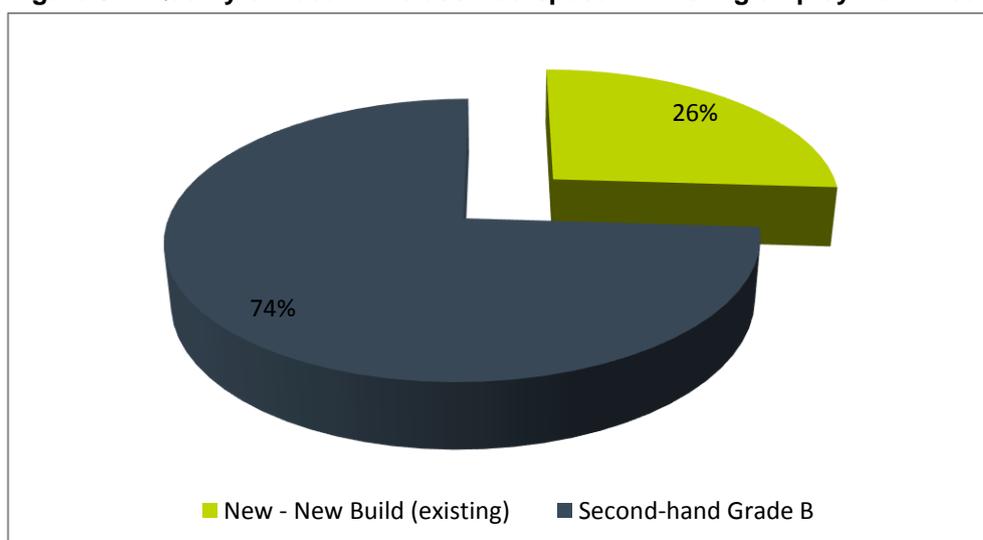
Table 5-4 Vacant floorspace and vacancy rate by use class

Location	B1a/b		B1c		B2		B8		Total	
	sqm	%	sqm	%	sqm	%	sqm	%	sqm	%
Existing Employment Areas	3,282	13%	0	0%	12,147	23%	11,422	6%	26,851	8%
Other Employment Areas	0	0%	2,818	7%	0	0%	0	0%	2,818	2%
Total	3,282	5%	2,818	3%	12,147	17%	11,422	5%	29,669	6%

Source: Atkins based on EGI and VOA data. Figures in the table are rounded

- 5.130. **Figure 5-2** illustrates the quality of vacant premises within existing employment areas. Second hand - Grade B floorspace makes up 74% of vacant premises within existing employment areas, and followed by existing new build (26%). New and refurbished premises are more attractive to new investors and are therefore potentially more likely to be occupied more quickly than second-hand buildings. Chapter 7 identifies in more detail the quantum of vacant B-class units and the general age and quality of the employment areas.

Figure 5-2 Quality of vacant B-class floorspace in existing employment areas



Source: Atkins based on EGI data⁶

⁶ Sites classified as 'other' do not have information about their quality in the EGI database.

- 5.131. **Table 5-5** provides an analysis of vacant floorspace by employment area. The main concentration of vacant floorspace (B1a) is located in Site 11 – Millmead Way (511 sqm) and Site 19 - Wood Green (131 sqm).
- 5.132. With reference to light and general industrial activities the main concentration of vacant floorspace (B1c/B2) is located in Site 2 – Bounds Green Industrial Estate (2,818 sqm), Site 12 – North East Tottenham (2,669 sqm) and Site 14 – South Tottenham (2,514 sqm). This is due to the prevalence of under-used buildings within these sites.
- 5.133. With reference to warehouse / storage & distribution (B8) the largest concentration of vacant floorspace is located in Site 17 – White Hart Lane (3,659 sqm) and Site 5 – Cranford Way (3,042 sqm)
- 5.134. It should be noted that the figures shown in **Table 5-5** are based on a post code analysis of EGI 'availability data'. Where reference was made to more than one B-class activity for a given EGI data point the consultants have assumed an even split of the total floorspace area (sqm).

Table 5-5 Vacant floorspace by employment area (sqm)

No.	Site Name	Office B1a (sqm)	Light / General Industrial B1c/B2 (sqm)	Warehouse / Storage & Distribution (B8) (sqm)	Total (sqm)
1	Crusader Industrial Estate, N15. Ashfield Road	0	0	1,330	1,330
2	Bounds Green Industrial Estate	0	2,818	0	2,818
3	Brantwood Road	0	474	1,010	1,484
5	Cranford Way	0	0	3,042	3,042
9	High Road West	0	156	0	156
11	Millmead and Ashley Road Extension	511	1,138	604	2,253
12	North East Tottenham	0	2,669	0	2,669
14	South Tottenham	0	2,514	548	3,062
17	White Hart Lane	0	0	3,659	3,659
19	Wood Green	131	0	1,229	1,360
Total		3,282	14,965	11,422	29,669

Source: Atkins based on EGI data

Commercial development pipeline

- 5.135. The London Development Database (LDD) records selected planning permissions in the Greater London area as part of the monitoring process of monitoring the Mayor's London Plan.
- 5.136. Within Haringey Borough there are valid as yet unimplemented B-class planning permissions which would result in a total net loss of -37,593 sqm of B-class floorspace. A net loss was identified for industrial (B2) and warehousing (B8) while a substantial net gain has been identified for offices (B1), as shown in **Table 5-6**.

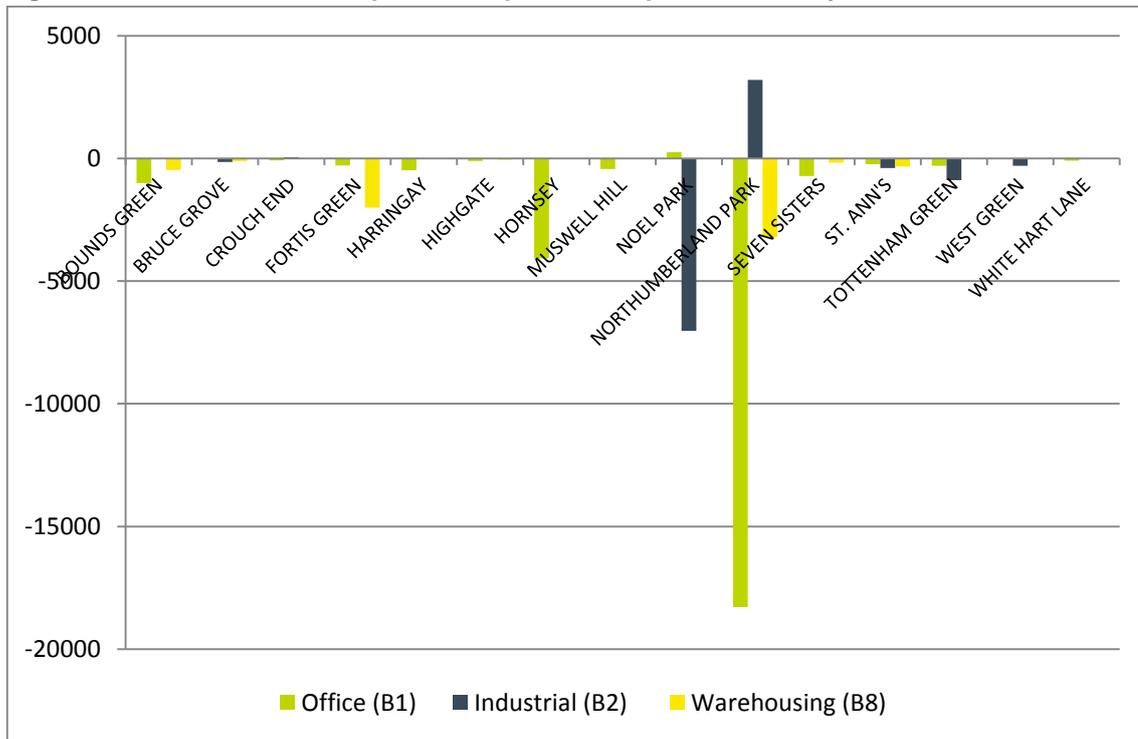
Table 5-6 Summary of B-class floorspace unimplemented permissions

Use Class	Existing B-use class floorspace (sqm)	Proposed loss of B-class floorspace (sqm)	Net loss of B-class floorspace (sqm)
Office (B1)	27,853	2,067	-25,786
Industrial (B2)	11,932	6,454	-5,478
Warehousing (B8)	6,329	0	-6,329
Total	46,114	8,521	-37,593

Source: Haringey monitoring data (2012)

- 5.137. **Figure 5-3** illustrates the unimplemented permissions by ward. In relation to office floorspace (B1) the greatest net loss has occurred within Northumberland Park ward (-18,285 sqm). In relation to warehousing (B8) the greatest loss occurs in Northumberland Park ward (-3,202 sqm). In relation to industrial (B2) the greatest net loss was seen in Noel Park ward (-7,030 sqm).
- 5.138. It should be noted that the above refer to the loss of B use class floorspace and do not necessarily mean the loss of employment-generating floorspace. For example, the Tottenham Hotspur stadium development represents a significant investment in a strategic facility with new jobs provision (such as the development of a new super-market) and not just displacement of employment land to residential.

Figure 5-3 Net B-class floorspace unimplemented permissions by ward



Source: Haringey Borough Council monitoring data

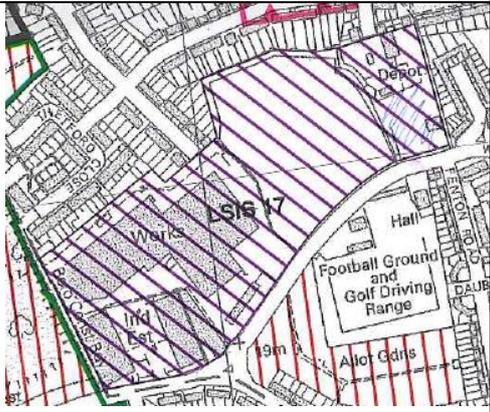
Evaluation of surveyed designated employment development sites

- 5.139. The site assessment of 22 designated employment development sites has been undertaken in accordance with the key criteria set out in the Mayor's Industrial Capacity SPG and the NPPG.
- 5.140. The desk-top analysis and the site appraisals have identified vacant land with potential for development and also land with opportunity for intensification as follows:

Vacant land

- 5.141. Within the existing employment areas there are some key vacant sites which can be developed for employment uses. It is important to identify these opportunities as these areas are a potential supply of employment land. Some 0.38 ha of vacant land in the existing employment areas was identified using satellite photography and was verified on site in early June 2014. This is set out in **Table 5-7**.

Table 5-7 Vacant parcels in surveyed designated employment development sites

Settlement		Vacant Parcel	Vacant Parcel Area (Ha)
DEA 17 White Hart Lane			0.38

Employment site boundary amendments

- 5.142. Amendments to designated employment site boundaries (as verified on site) are set out in **Table 5-9** below and shown in **Appendix A**.

Table 5-8 Proposed employment site boundary amendments

DEA No	Recommended boundary amendments
DEA 8 N17 Studios 784-788 High Road And DEA20 High Road East	The east of LEA 20 is now occupied by a large retail use (Sainsburys). This should be removed from the employment designation. Within LEA 20, there are still some offices fronting onto the High Street that should be protected under this employment designation.
DEA15 Tottenham Hale	The south of DEA 15 is now occupied by a new non-B class development that includes a cluster of retail premises (Pizza Hut, Maplin, KFC) located on Station Road. It is recommended that the “island” between Ferry Lane, the Hale and Hale Road should be removed from the employment designation. The remainder of the site still contains B class uses that should be protected under the employment designation

Employment site designation amendments

- 5.143. Amendments to employment site designations (as verified on site) are set out below in **Table 5-10**.

Table 5-9 Total occupied B-class floorspace in existing employment areas

DEA No.	Site name	Land area (ha)	Total B-class floorspace in existing employment areas (sqm)	Existing designation (saved policies)	Recommended designation
DEA1	Crusader Industrial Estate, N15. Ashfield Road	1.6	7,643	LSIS	RA
DEA2	Bound Green Industrial Estate	5.5	19,248	EL	No change
DEA3	Brantwood Road	16.9	45,168	SIL	No change

DEA No.	Site name	Land area (ha)	Total B-class floorspace in existing employment areas (sqm)	Existing designation (saved policies)	Recommended designation
DEA4	Campsbourne	0.6	2,202	RA	No change
DEA5	Cranford Way	7.9	14,707	LSIS	No change
DEA6	Friern Barnet Sewage Works	6.2	0	EL	No change ⁷
DEA7	Hale Wharf	1.7	5,124	RA	No change
DEA8	N17 Studios 784-788 High Road	2.1	278	EL	De-allocated
DEA9	High Road West	2.6	2,748	LSIS	RA
DEA10	Lindens / Roseberry Works	1.3	4,935	LSIS	No change
DEA11	Millmead and Ashley Road	11.5	37,000	SIL / RA	No change
DEA12	North East Tottenham	15.5	42,871	SIL	No change
DEA13	Queen Street	1.6	5,594	LSIS	No change
DEA14	South Tottenham	9.1	36,225	LSIS	Split site into LSIS and RA
DEA15	Tottenham Hale	13.2	6,610	SIL/RA	RA (southern part to be de-allocated)
DEA16	Vale Road / Tewkesbury Road	6.7	17,771	LSIS	LSIS and RA
DEA17	White Hart Lane	8.1	21,558	LSIS	No change
DEA18	Willoughby Lane	1.1	8,161	RA	LSIS
DEA19	Wood Green	12.1	38,640	RA	No change
DEA20	High Road East	1.0	0	RA	No change
DEA21	Marsh Lane	2.1	86	SIL	No change
DEA22	Rangemoor Road, Herbert Road	3.0	4,273	RA	No change

Source: Atkins based on VOA and EGI data

Key messages

- 5.144. Haringey Borough has 465,544 sqm of B-class employment floorspace, of which the majority (69%) is located within employment areas. In terms of share of total stock the majority is B8 with a 49% share and B1c/B2 with a 36% share of total stock.
- 5.145. The level of vacancy within the Borough at the time of writing of this report was approximately 6%, with the highest concentration by some margin in the B1c/B2 use class (20%). In designated employment sites there are low levels of vacancy of office floorspace (3%) and warehousing (6%), whilst B1c/B2 floorspace has the greatest level of vacancy with 15%.
- 5.146. The Borough has a number of potential sources that could bring forward new employment floorspace, as follows:
- Vacant Floorspace (EGI data) - This represents approximately 29,669 sqm of actively marketed B-class employment space. This presents a source of supply, for the market to function efficiently. There will always need to be flexibility and a range of choice in

⁷ Subject to the results of a detailed development viability assessment.

premises to allow for movement of business and to allow business to expand or start up. This current supply provides a vacancy level of around 6% which is considered to be at the low end of the optimal vacancy rate required for the efficient operation of the market. A vacancy rate of approximately 7%-10% is generally considered necessary for the efficient operation of the market, allowing for flexibility and market churn.

- Commercial Development Pipeline – Recent monitoring data supplied by Haringey Borough Council identifies that there is valid but as yet unimplemented B use class planning permissions, which would result in a net loss of 37,593 sqm of B-class floorspace.
- Vacant land - This represents approximately 0.38 ha of potential B-class employment space. This presents a source of supply that could deliver 1,748 sqm of B-class employment floorspace.

6. Future employment land requirements

Introduction

- 6.1. This section assesses Haringey’s future employment floorspace and land requirements by use class (B1a/b, B1c, B2 and B8). It is noted that forecasts of future economic growth and resulting employment land requirements should be treated as indicative rather than definitive. It is difficult to predict future economic trends at any time but particularly so in the current context of prolonged economic uncertainty and therefore it is recommended that a conservative approach be taken, especially in the context of long-term (5+ years) projections indicating potential release of employment land.
- 6.2. To mitigate the uncertainties associated with forecasting future employment land requirements we have considered a range of possible growth scenarios including:
- A scenario based on the employment forecasts produced by Experian in April 2014;
 - A scenario based on the employment forecasts appearing in the Draft Further Alterations to the London plan (January 2014); and
 - A trend-based scenario based on Haringey’s historic employment growth levels.

Methodology

- 6.3. Analysis in this section is based upon a range of employment growth projections. The base scenario uses Experian’s detailed employment forecasts for Haringey. The second scenario uses GLA Economics’ employment projections for Haringey from the Draft Further Alterations to the London Plan. The third scenario is a trend-based scenario using Haringey’s historic employment figures over the period 1998-2012 as the basis for projecting future employment growth levels.
- 6.4. Under all three scenarios, employment sectors have been mapped to the core B1a/b (business), B1c (light industrial), B2 (general industrial) and B8 (storage and distribution) “employment” uses and job numbers have been converted to floorspace and land demand by applying appropriate employment density and plot ratio assumptions. The employment densities used are in line with the HCA’s Employment Densities Guide 2nd Edition (2010) while the plot ratios used are the same as those used in the 2012 Haringey Employment Land Update and are in line with the ODPM’s Employment Land Reviews: Guidance Note (2004). These employment density and plot ratio assumptions are summarised in **Table 6-1** below.

Table 6-1 Employment density and plot ratio assumptions

Use class	Employment density	Plot ratio
B1a/b	12m ² per FTE	65%
B1c	40m ² per FTE	40%
B2	40m ² per FTE	40%
B8	70m ² per FTE	50%

- 6.5. Forecasts are presented for 2016, 2021, 2026 and 2031 so that they can inform short-term and mid-term as well as longer-term policies, recognising that forecasts become more uncertain the further forward they project. The starting point for the analysis is that the supply and demand for employment land and premises in Haringey was in general equilibrium in 2013, the base year for the analysis. This means that supply and demand were broadly even and there was neither a significant oversupply of land (e.g. high volumes of vacant land/premises) nor a significant undersupply (e.g. very limited or no availability of employment land/premises).

Scenario 1: Experian-based scenario

- 6.6. The base scenario is based on the latest outputs of Experian's employment forecasting model. Experian's detailed local level forecasts are based on an integrated regional sectoral model of the UK. The model is constructed on the basis that each UK region and each sector of the economy is treated as an economic entity in its own right, for which forecasts can be made using historic relationships between variables. In broad terms, the historical performance of county economies is interpreted in terms of their share of the regional economy of which they are a part. In turn, the performance of local authority areas is based on their share of their encompassing county. For each sector of the economy, equations are produced for output and employment that explain the observable relationship between these variables at the local and regional level.
- 6.7. According to Experian's forecasts, full time equivalent employment (FTE) across all sectors within Haringey is forecast to increase from 50,850 FTEs in 2011 to approximately 68,460 FTEs in 2031, an increase of approximately 35%. The number of FTEs in B use class sectors is forecast to increase from 25,800 in 2011 to 35,530 in 2031, an increase of approximately 38%. A summary of Experian's employment forecasts is presented in **Table 6-2** below.

Table 6-2 Experian employment forecasts (FTEs)

Use class	2011	2016	2021	2026	2031	Change 2013-2031
B1a/b	18,890	22,940	24,500	25,900	27,430	8,540
B1c/B2	2,490	2,490	2,340	2,220	2,070	-420
B8	4,420	5,060	5,410	5,730	6,030	1,610
Total B use class	25,800	30,490	32,250	33,850	35,530	9,730
Total employment (all use classes)	50,850	59,590	62,750	65,590	68,460	17,610

Source: Experian, Atkins

- 6.8. Employment in B1a/b sectors is forecast to increase by approximately 8,540 FTE jobs between 2011 and 2031, which equates to an increase of 45%. The real estate, and professional services sectors are projected to see particular growth of 2,280 and 2,870 FTE jobs respectively. Employment in B8 sectors is also forecast to grow strongly by 36% while employment in B1c/B2 sectors is forecast to decline by 17%.
- 6.9. Based on the above employment forecasts and the employment density and plot ratio assumptions summarised in **Table 6-1**, Haringey's floorspace and land requirements over the period 2011-2031 are presented in **Table 6-3** and **Table 6-4** below.

Table 6-3 B use class floorspace need (sqm) – Scenario 1

Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	226,600	275,300	294,000	310,800	329,200	102,600
B1c/ B2	99,700	99,400	93,600	88,900	82,800	-16,900
B8	309,500	354,300	378,500	401,000	421,900	112,400
Total floorspace	635,800	729,000	766,100	800,700	833,900	198,100

Source: Experian, Atkins

Table 6-4 B use class land need (ha) – Scenario 1

Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	35	42	45	48	51	16
B1c/ B2	25	25	23	22	21	-4
B8	62	71	76	80	84	22
Total land	122	138	144	150	156	34

Source: Experian, Atkins

- 6.10. According to the Experian-based scenario, B1a/b land demand will grow by 16 ha over the period 2011-2031 and B8 land requirements will increase by 22 ha. Demand for B1c/B2 land is forecast to decline by 4 ha (-17%). The overall employment land need in the Borough is forecast to increase by approximately 34 ha. This however assumes that all surplus B1c and B2 land will be re-used to meet the growing need of businesses in the B1a/b and B8 sectors. It is possible that some of the surplus B1c and B2 land could be used to accommodate demand in B1a/b and B8 sectors but it is likely that some of the poorer quality industrial sites would not be fit to accommodate the needs of B1a/b and B8 businesses.
- 6.11. On top of this, an allowance should be made for any existing employment sites that could be lost to other uses over the assessment period. Taking the above into consideration, the implications of Scenario 1 are that Haringey should plan for at least 38 ha (16 ha + 22 ha) of new employment land over the period 2011-2031.

Scenario 2: London Plan aligned scenario

- 6.12. Scenario 2 follows a similar methodology to Scenario 1 but uses GLA Economics' employment forecasts for Haringey (as they appear in the Draft Further Alterations to the London plan, January 2014) as the starting point for the analysis.
- 6.13. According to GLA Economics' forecasts, employment in Haringey will increase from 73,000 jobs in 2011 to 90,000 jobs in 2031 and 95,000 jobs in 2036. The number of jobs in Haringey is forecast to grow by 29.5% between 2011 and 2036; this is the highest level of employment growth⁸ among all London boroughs.

Table 6-5 Haringey employment forecasts – GLA Economics

	2011	2016	2021	2026	2031	2036	Change 2011-2036
Haringey	73,000	77,000	80,000	85,000	90,000	95,000	22,000

Source: GLA Economics

- 6.14. As GLA Economics' forecasts for Haringey are not broken down by sector, Experian's sectoral breakdown (the proportion of each sector's share of all employment) has been applied to GLA Economics' forecasts in order to estimate the number of jobs related to each use class. Furthermore, GLA's forecasts have been converted into full time equivalent jobs by applying sector-specific full- to part-time employment ratios.
- 6.15. Based on the above, Haringey's B use class floorspace requirements are expected to increase by at least 178,400m² over the period 2011-2031 (**Table 6-6**). B8 floorspace requirements are projected to increase by 111,600m² and B1a/b by 97,100m² while B1c/B2 floorspace requirements are expected to decline by 30,300m².

⁸ In percentage terms.

Table 6-6 B use class floorspace need (sqm) – Scenario 2

Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	257,600	300,500	316,000	334,300	354,700	97,100
B1c/ B2	124,600	115,500	106,200	101,400	94,300	-30,300
B8	367,700	399,100	417,900	449,500	479,300	111,600
Total floorspace	749,900	815,100	840,100	885,200	928,300	178,400

Source: Experian, Atkins

- 6.16. In terms of employment land need, B8 requirements are projected to increase by 22ha and B1a/b by 15ha while demand for B1c/B2 land is forecast to decline by 8ha resulting in a net additional requirement of 30ha (**Table 6-7**). As with Scenario 1, however, this assumes that all surplus industrial land will be re-used for B1a/b and B8 purposes and that no existing employment land will be lost to other uses over the assessment period.

Table 6-7 B use class land need (ha) – Scenario 2

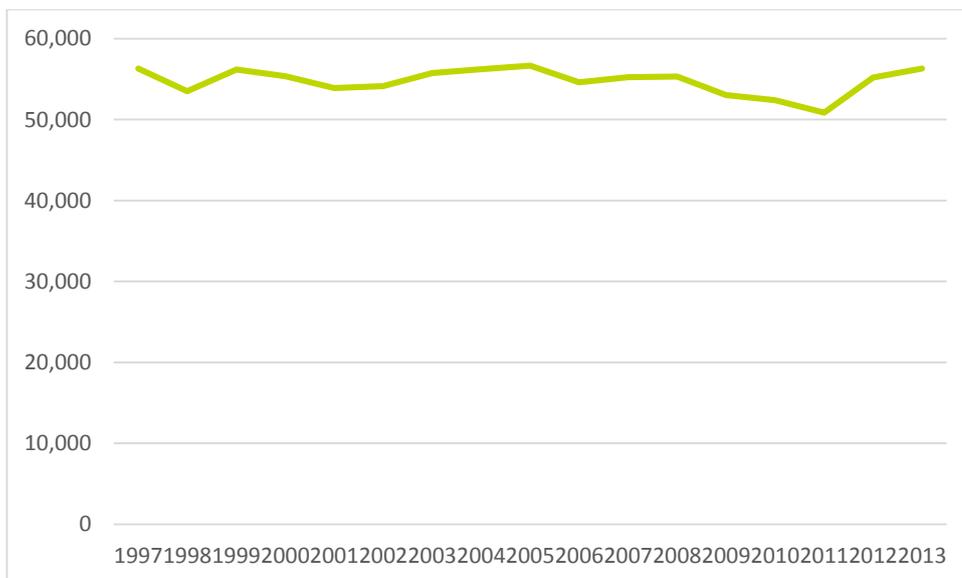
Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	40	46	49	51	55	15
B1c/ B2	31	29	27	25	24	-8
B8	74	80	84	90	96	22
Total land	144	155	159	167	174	30

Source: Experian, Atkins

Scenario 3: Trend based scenario

- 6.17. Scenario 3 is a trend-based scenario based on Haringey's historic employment growth levels between 1997 and 2013. As **Figure 6-1** illustrates, there have been some fluctuations in the number of FTE jobs over that period but employment levels in 2013 were almost identical to those in 1997 (56,300 FTE jobs). The average number of FTE jobs over this period was 54,760 and the median 55,220.

Figure 6-1 Haringey FTE jobs (all sectors), 1997-2013

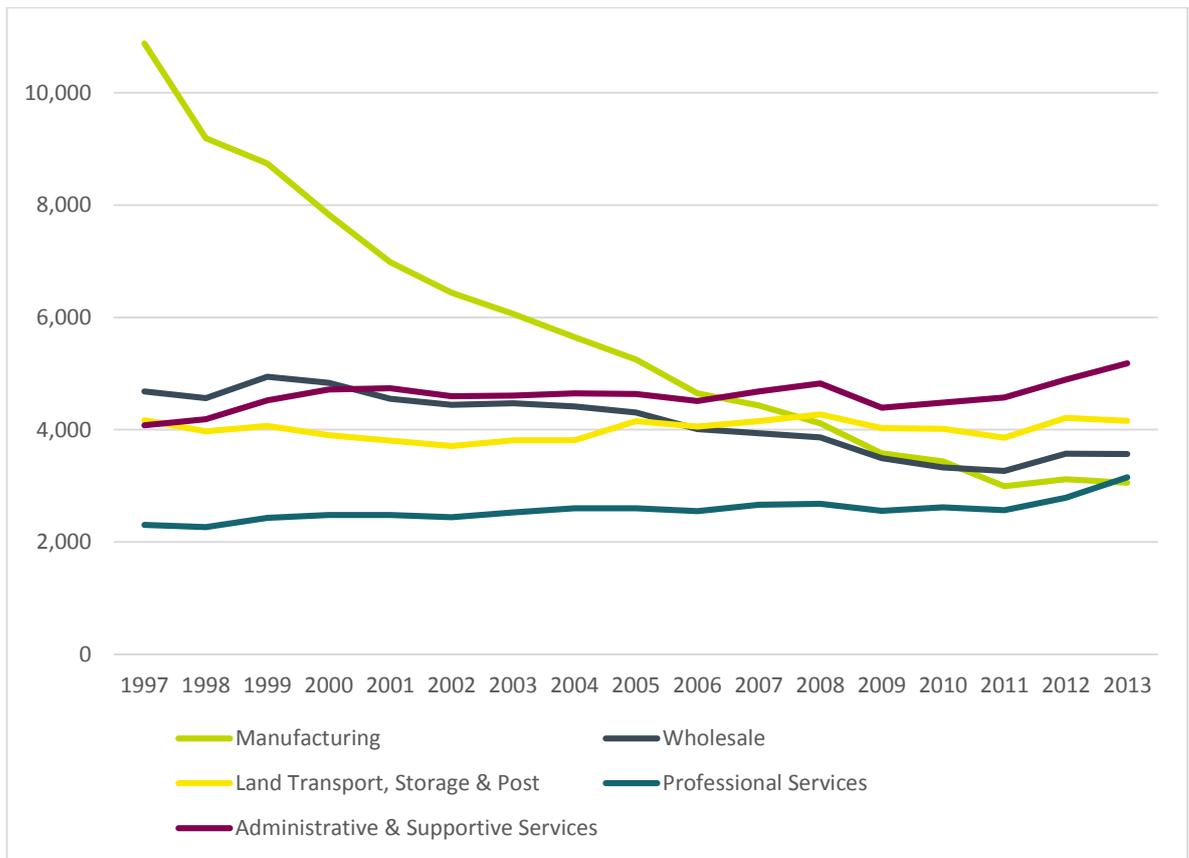


Source: Experian

- 6.18. In terms of specific employment sectors, historic trends confirm the collapse of the manufacturing sector which lost 72% of its number of jobs over the period 1997-2013. The wholesale sector also

experienced significant decline (-24%) while B1 sectors achieved significant levels of growth, with the professional services sector in particular growing by 37% between 1997 and 2013 (**Figure 6-2**).

Figure 6-2 Haringey FTE jobs (main B use class sectors), 1997-2013



Source: Experian

- 6.19. The projection of these historic trends to 2031 suggests further growth in B1a/b sectors and further decline in B1c/B2 and B8 sectors (**Table 6-8**).

Table 6-8 Trend-based employment projections

Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	18,890	20,830	21,540	22,240	22,950	4,060
B1c/B2	2,490	2,030	2,070	2,150	2,240	-250
B8	4,420	4,260	4,060	3,870	3,680	-740
Total B use class	25,800	27,120	27,670	28,260	28,870	3,070

Source: Atkins

- 6.20. Under Scenario 3, B1a/b floorspace demand will increase by some 48,800m² over the period 2011-2031, while demand for B1c/B2 and B8 floorspace will decrease by 10,000m² and 51,800m² respectively. This would result in some 13,000m² of surplus floorspace by 2031.

Table 6-9 B use class floorspace need (sqm) – Scenario 3

Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	226,600	250,000	258,400	266,900	275,400	48,800
B1c/ B2	99,700	81,000	82,600	86,100	89,700	-10,000
B8	309,500	298,100	283,900	270,800	257,700	-51,800
Total floorspace	635,800	629,100	624,900	623,800	622,800	-13,000

Source: Experian, Atkins

- 6.21. The above floorspace projections translate into indicative demand for 8 additional hectares of B1a/b land over the period 2013-2031. Over the same period, industrial and warehousing land requirements are projected to decrease by approximately 13 ha, leading to a net surplus of approximately 5 ha by 2031 (**Table 6-10**).

Table 6-10 B use class land need (ha) – Scenario 3

Use class	2011	2016	2021	2026	2031	Change 2011-2031
B1a/b	35	38	40	41	42	8
B1c/ B2	25	20	21	22	22	-3
B8	62	60	57	54	52	-10
Total land	122	118	117	117	116	-5

Source: Experian, Atkins

Note: Figures are rounded and may not completely add up

Conclusion

- 6.22. The scenarios considered above suggest Haringey's additional employment land requirements over the period to 2031 will range between -5 ha and 34 ha. According to the GLA Economics and Experian employment forecasts, there will be an additional need for 30ha to 34ha of employment land. The extrapolation of Haringey's past employment trends results in an overall surplus of employment land of approximately 5 hectares due to decreasing demand for industrial and warehousing land.
- 6.23. All scenarios project employment growth in B1a/b sectors and continued decline in B1c/B2 sectors. A key difference is that Scenarios 1 and 2 forecast growth in B8 employment and land requirements while Scenario 3 suggests decline.

7. Future employment site supply requirements

Introduction

- 7.1. Chapters 3, 4, 5 and 6 have highlighted the main issues facing Haringey in terms of current supply and future demand for employment. This section assesses the suitability of existing identified employment sites in Haringey to meet future business accommodation requirements to 2031.
- 7.2. The process undertaken can be summarised as follows:
- The range of additional floorspace (depending on the Scenario considered) that needs to be provided in order to meet future requirements has been identified. This yields an estimate of net land requirements to be provided during the period to 2031 (Chapter 6);
 - The existing employment sites have been evaluated in terms of their suitability for future employment use (see below); and
 - Recommendations about the amount of floorspace potentially available (see below).

Refining a future portfolio of employment sites

Future employment requirements

- 7.3. The implications of the above employment projections in terms of future employment floorspace requirements are set out in Chapter 6. All scenarios project additional need for B1a/b employment floorspace in the period to 2031 and decline in B1c/B2 floorspace requirements. Under Scenarios 1 and 2 B8 floorspace requirements will increase over the period 2011-2031 while under Scenario 3 they will decline.
- 7.4. In order to meet employment land requirements to 2031, it is necessary to firstly identify employment locations which have the physical potential to accommodate future growth. This has been achieved through the 'taking stock' assessment, the comprehensive site appraisals presented in Chapter 5 and the review of the local property market presented in Chapter 3.

Supply update

- 7.5. In order to assess ways in which future demand can be met, we have examined a range of potential sources of supply, which include:
- Vacant B Class Floorspace (source: EGI).
 - Employment Floorspace from Vacant Land.
 - Commercial Development Pipeline.
- 7.6. **Table 7-1** sets out a breakdown of potential employment floorspace. It should be noted that vacant floorspace can only go a certain way in meeting the future needs for employment floorspace as there will always need to be a degree of vacant floorspace in a properly functioning market, and also the requirements for new floorspace are largely for B1(a) floorspace and therefore some of the vacant B2 or B8 employment floorspace may not be appropriate to meet these needs. Future employment floorspace needs are also sensitive to market preferences in terms of quality and location of premises.
- ### Vacant land supply and land for intensification assumptions
- 7.7. The amount of floorspace potentially available from vacant land at each of the employment sites (identified through site appraisal surveys) has been estimated in **Chapter 5**.
- 7.8. **Table 7-1** shows that there is potentially a loss of -35,845 sqm of floorspace when taking account of vacant land supply and the commercial development pipeline.

Table 7-1 Vacant land and land identified for intensification / redevelopment

Employment Site	Area of Land		Floorspace (sqm) ⁹			Total
	Size of Land (ha)	Land (sqm)	B1(a)/b	B2 / B1(c)	B8	
Employment Floorspace from Vacant Land						
DEA17	0.38	3,800	684	152	912	1,748
Commercial Development Pipeline						
			-25,786	-5,478	-6,329	-37,593
Total			-25,102	-5,326	-5,417	-35,845

Source: Atkins

Supply-demand balance

- 7.9. For the market to function efficiently and to allow effectively for churn, choice and flexibility, it will always be necessary for pipeline supply to be in excess of projected levels of future demand. In simply planning for an amount of supply which matches future estimates of demand in quantitative terms, the operation of the market will be distorted which would result in a significant element of demand not being met. In allowing employment growth to materialise through new development, a surplus in supply is required to ensure that actual demand can be met in terms of location, type, timing, quality and size.
- 7.10. **Table 7-2** sets out the relationship between the estimated demand and supply of employment floorspace in the Borough by type of floorspace. It takes the total supply identified in **Table 7-1** from the outputs of the three scenarios (discussed in Chapter 6).

Table 7-2 Supply/demand floorspace balance by 2031 (sqm)

	B1a/b	B1c/B2	B8	Total
Experian-based	-128,000	12,000	-118,000	-234,000
London Plan aligned	-122,000	25,000	-117,000	-214,000
Trend-based	-74,000	5,000	46,000	-23,000

Note: Negative values indicate shortfall, positive values indicate surplus. All figures are rounded.

Source: Atkins

- 7.11. Under the Trend-based scenario (Scenario 3), Haringey is projected to have a shortfall of B1a/b floorspace by 2031 (approximately 74,000 sqm) and an oversupply of industrial and warehousing land (51,000 sqm in total). Allowing for the B1a/b re-use of surplus B1c/B2 and B8 land, Haringey is projected to have a shortfall of some 23,000 sqm of employment floorspace.
- 7.12. Under both the Experian-based and London Plan aligned scenarios, Haringey is projected to have significant employment floorspace shortfalls, ranging from 214,000 sqm to 234,000 sqm. The growing need for employment floorspace is projected to be almost evenly split between B1a/b and B8.

Conclusions

- 7.13. The comparison of the potential supply of employment floorspace with the projected levels of demand indicates the following:

Office and R&D floorspace

- 7.14. Future demand for B1a/b floorspace is expected to outstrip the available supply. It is therefore important that opportunities to re-use any surplus B2/B8 land are fully explored. This is particularly important in the context of recent changes to Permitted Development Rights that enable the conversion of office to residential uses.

⁹ Assumes 60% of developable land and 40% reserved for infrastructure and access. Assumes mixed use employment floorspace proportions (30% B1a/b, 20% B1c/B2 and 50% B8)

- 7.15. It is therefore essential that planning policy encourages the refurbishment and/or redevelopment of unsuitable or obsolete employment land in the Borough, as planned and committed supply will not always be translated into a physical provision of floorspace.
- 7.16. In this context, it will be important to protect existing, viable B1a/b employment areas and not rely on potential supply that may not reach the market place. Furthermore, over the medium and longer term, the Council should aim to intensify the use of existing employment sites (where possible) and provide B1a/b floorspace as part of mixed-use developments.

Industrial and warehousing floorspace

- 7.17. Under the Trend-based scenario, demand for industrial and warehousing floorspace is projected to decline over the period to 2031. This is expected to result in some surplus employment land (estimated to be in the region of 51,000 sqm). In quantitative terms, this should be sufficient to meet much of the growing demand for B1a/b floorspace but qualitative factors will ultimately decide how much of the surplus industrial and warehousing land can be reused for B1a/b purposes.
- 7.18. Given Haringey's strong housing and regeneration priorities, there is no benefit in safeguarding industrial and warehousing land that is surplus to requirements. Therefore, opportunities for release to other uses (e.g. Community) should be fully explored where appropriate.
- 7.19. Any release of surplus employment land should not be to the detriment of successful B2 and B8 businesses. Even though B2/B8 employment numbers and land requirements are projected to decline, it is important that Haringey maintains a core of industrial and warehousing activities in order to maintain a diverse economy that provides a wide range of employment opportunities for local people. Therefore, any B2/B8 businesses that are affected by the loss of employment land should be relocated to alternative suitable premises so that viable industrial and warehousing businesses are not adversely affected.

8. Conclusions and policy implications

- 8.1. This section sets out our conclusions and recommendations for taking forward employment land policies in the Borough of Haringey.

Projected demand

- 8.2. The employment growth projections set out in Chapter 6 identify potential B class employment growth of between 3,070 FTE jobs (Trend-based scenario) and 9,730 FTE jobs (Experian-based scenario) over the period 2011-2031. In all scenarios, employment growth is anticipated to come mainly from B1a/b sectors (mainly office based jobs). According to the Trend-based projections, employment in industrial and warehousing sectors will decline. According to the Experian-based projections, employment in B1c/B2 sectors will decline but employment in B8 sectors will grow.
- 8.3. For the purposes of land use planning, it is important to convert the projected levels of employment growth into additional floorspace and land requirements. The indicative additional requirement for B1a/b floorspace over the period 2011-2031 is projected to range between 48,800 sqm and 102,600 sqm.
- 8.4. Having considered the three scenarios tested as part of this study, it is recommended that the Council adopts a cautionary approach to future employment growth prospects (and resulting employment land requirements) that is in line with historic trends and complements Haringey's regeneration priorities. The projections of Scenarios 1 and 2 would result in levels of B use class employment growth that Haringey has not witnessed in the past two decades and would result in significant additional employment land requirements that would be difficult to provide for given the limited availability of sites and the Borough' housing and regeneration priorities.
- 8.5. Taking into account the inherent uncertainty of long-term economic forecasting, it is recommended that the projections of the trend-based scenario (Scenario 3) are used as the minimum amount of employment land needed in Haringey over the period 2011-2031. At the same time, the Council should maintain a flexible approach to its employment land policies that recognises there may be opportunities for higher levels of growth that lie between the projections of Scenarios 1 and 3.
- 8.6. Based on the above, the Council should plan for a minimum of 8 hectares of additional B1a/b land over the period 2011-2031. The increased B1a/b requirements could be largely accommodated through the re-use of surplus industrial sites, the intensification of employment uses on existing employment sites, the promotion of mixed-use developments and the safeguarding of good quality employment sites. This would allow for a limited number of surplus or poor quality employment sites to be considered for release to alternative uses.
- 8.7. Safeguarding office floorspace (where possible) and re-using surplus B2/B8 land for B1 purposes is particularly important not only because of the projected growth in office-based employment but also because of the effects of permitted development rights and the potential loss of office floorspace through B1a to C3 conversions.
- 8.8. In terms of B8 land requirements, the lack of suitable B8 sites in the Borough in combination with the Council's strategic regeneration priorities make any significant B8 growth in the Borough both unlikely and unsuitable.

Supply / demand balance

- 8.9. There is currently a low amount of vacant floorspace in the surveyed employment areas and in smaller sites across the Borough, totalling some 29,670 sqm. This represents approximately 6% of total floorspace. The vacant floorspace has a role to play in meeting some of the future demand, but in any market there will be a need for a level of vacancy to allow for movement of businesses to meet their needs. A normal level of vacancy in a buoyant market could be considered to be between 7%-10%. Therefore not all vacant land can be used to meet growth needs. There will also be issues with the type and quality of some units not meeting the requirements of businesses looking to move into the Borough or start up.
- 8.10. Another source of supply is the existing commercial development pipeline, i.e. sites that have planning permission that have not been implemented. Although in terms of proposed B class use floorspace, there are some 8,500 sqm of floorspace in the pipeline, when the existing floorspace

at these sites is taken into account the net figure represents a net loss of approximately 37,600 sqm.

- 8.11. There are some short to medium term opportunities for new floorspace in the surveyed employment areas, where there is a total of 0.38 ha of vacant land, which could accommodate a total of 1,750 sqm of new floorspace.
- 8.12. Chapter 6 has quantified the potential from each of the above sources to assess what the theoretical supply and demand balance in the Borough, might be, in terms of meeting both the floorspace and job growth forecasts. This has shown that theoretically there is sufficient floorspace either at present or planned to be developed, to meet the forecast needs for B1c/B2 floorspace needs. However, there is likely to be a shortfall in the amount of floorspace to meet the forecast needs for B1a/b floorspace and, depending on the scenario considered, B8 floorspace. This could be met through the re-use of surplus B2/B8 land, the intensified use of existing B1a/b sites and the provision of office floorspace as part of mixed-use developments.
- 8.13. It should be noted that the quantitative assessment reflects a level of uncertainty inherent in the job forecasts and the supply of sites needs to provide for a choice of size, quality, type and location of premises, and therefore aligning supply completely with demand. Providing a precise match of sites and premises is not realistic accounting for the functioning of the market and not the purpose of the exercise. However, balancing the supply and demand does allow the Council to consider what policy approaches they will need to take forward to meet the future employment needs in the Borough and to promote growth that responds to market signals.

Policy implications

- 8.14. Haringey's employment land policies need to be aligned to the national policy context which emphasises providing a supply of good quality employment sites to meet the needs of the business community and supporting existing and growing sectors within the local economy. At the same time, Haringey's employment land policies need to also be aligned to the Borough's wider housing and regeneration strategies and plans.
- 8.15. The National Planning Policy Framework sets out that local planning authorities should plan positively and proactively to encourage sustainable economic growth. This should include supporting existing business sectors, promoting high-value growth sectors (e.g. knowledge-based, creative and high-tech industries) and adopting a flexible approach which takes account of the potential for needs which cannot be anticipated or to allow for rapid changes in economic circumstances.
- 8.16. Ensuring a supply of good quality, well located employment sites is maintained will help to support investment by existing and new businesses and growth in the local business base. Demand is likely to continue to be driven by small and medium sized businesses, primarily operating in B1 sectors. The trend-based forecasts suggest further decline in industrial and warehousing employment which is expected to result in some surplus employment land over the period to 2031. It is important that any surplus land is either re-used to meet B1a/b needs or released to other uses to contribute to Haringey's housing and regeneration objectives. At the same time, it will be important that fit-for-purpose, well occupied B2 and B8 sites that serve the needs of local businesses are safeguarded so that Haringey maintains a diverse range of business activities and employment opportunities.
- 8.17. The NPPF requires local authorities to be responsive to market signals to ensure that there is adequate provision of the right type of employment land to meet the needs of the business community. At the same time, there is little benefit in safeguarding employment sites that are not fit-for-purpose and could be used to relieve the Borough's housing and regeneration pressures.
- 8.18. This study represents part of the evidence base to identify what the market requires in terms of employment land needs. The Consultants recommend that in order to respond to market signals the Council should do the following:
- Undertake regular employment land review updates (as a guide, every 2-3 years) so that its evidence base remains up to date.
 - Undertake surveys of locally based businesses to understand business needs and aspirations. This will require an appropriate sample size and will need to explore

aspirations for growth / expansion, perceptions of the suitability of the location, type, size and quality of premises.

- Continue to carry out and monitor employment areas through regular annual or bi-annual surveys, assessing quantity of occupied and vacant floorspace, but also assessing the quality of the premises and wider site environment.
- Consult regularly with local property agents to gain perspectives of local market conditions.

8.19. Based on the findings of this study, it is recommended that:

- The Council safeguards its existing supply of B1a/b employment sites, protecting B1a/b sites that are fit for purpose (e.g. well-located and well-performing) and redeveloping sites for continued employment use where improvements are necessary or redevelopment at higher density is possible.
- Sites that are not fit for purpose and unlikely to meet future business needs should be considered for release. According to the trend-based projections, there will be a particular opportunity to re-use surplus industrial and warehousing land.
- The Council should work proactively with landowners and developers to bring forward new mixed-use developments where appropriate and to facilitate the intensification of existing employment sites where possible.
- The Council should keep monitoring the supply and demand for employment land and premises and maintain flexible policies that will enable it to respond to future opportunities for economic and business growth and investment when these arise.

The role of live/work units

- 8.20. The past two decades have seen many London Boroughs try to encourage the development of live/work units in an effort to address the strong housing pressures in the capital while limiting the loss of employment floorspace. In theory, live/work units can meet multiple employment, housing and regeneration objectives and would appear to be well suited to help Haringey achieve a balance between employment and housing growth.
- 8.21. The findings of a number of evaluation studies undertaken by London Boroughs however (including Merton, Hackney, Tower Hamlets and Hammersmith and Fulham) suggest that live/work policies have often failed to meet their intended objectives with the vast majority of live/work units being used solely for residential purposes.
- 8.22. Merton's Local Development Framework "Live/Work Update Briefing Note" (November 2010) states that over a 3-year period (2004, 2005 and 2006) not a single live/work had been used for its identified purpose.
- 8.23. The "Review of Live-Work Policy in Hackney" (April 2005) states that live/work enabled developers to side-step the employment promotion and affordable housing policy requirements that would otherwise have to be met and as a result most live/work units ended up being used for purely residential purposes. The Review describes live/work as a "planning scam" that has been difficult to tackle.
- 8.24. The "Does Live/work?" report (April 2005) prepared for LB Hammersmith and Fulham states that the vast majority of live/work proposals are motivated by a desire to get around planning controls (especially avoiding affordable housing contributions) and many live/work units have reverted to purely residential use.
- 8.25. Tower Hamlets' "Live-Work Report" (November 2006) also states that there is increasing evidence that live-work units are being used for purely residential purposes and that enforcement of the obligation to use the units for both live and work purposes has proved difficult.
- 8.26. Most evidence suggests that across London, developers often use live/work planning permissions purely as a way to bypass employment land protection policies and deliver units that are only used for residential purposes. Planning enforcement action is proving to be difficult and resource-intensive.

- 8.27. Based on the above, it is considered unlikely that live/work units can play a major role in Haringey in terms of promoting regeneration and housing growth while also providing employment floorspace.

Implementation

- 8.28. To help meet the forecast the consultants recommend that there will be a need for a more proactive approach to economic development within the Council; the following provides recommendations on potential implementation measures that could assist with this.

Guidance on the provision of B-Class floorspace within mixed use schemes

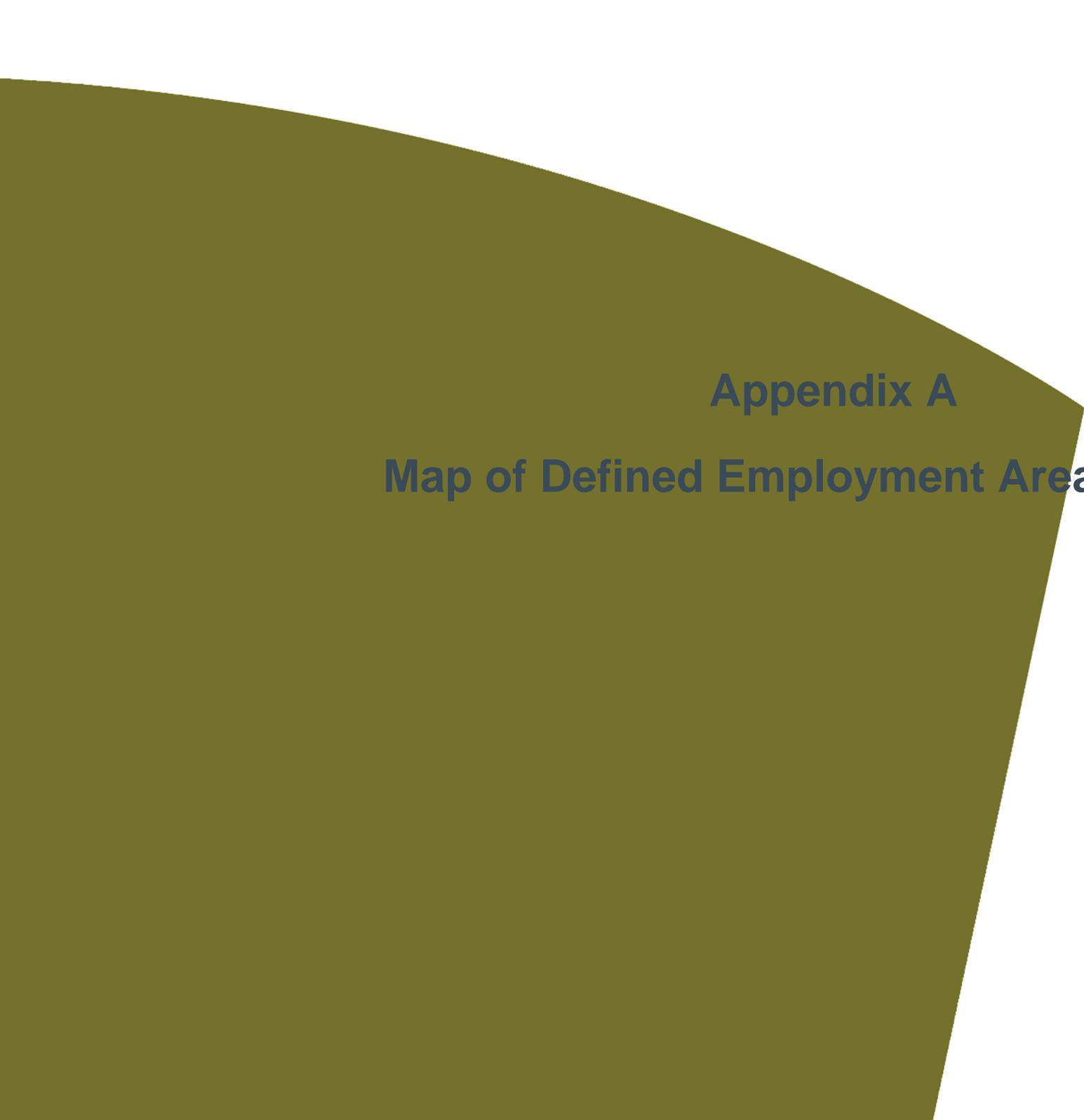
- 8.29. In order for the Council to maximise the economic development potential of sites within the Borough we recommend that further planning guidance in the form of an SPD could provide a clearer basis for applicants and the Council's Development Management and economic team to maximise the opportunities for employment generating floorspace within development proposals.
- 8.30. Guidance is required on types of employment provision which can be accommodated:
- Maximising location potential
 - Occupier needs and requirements (Size and type of premises reflecting mix of sectors and SMEs)
 - Configuration and design of premises.
 - Conversion and refurbishment projects
 - Fit out requirements
 - Management and disposal options
- 8.31. Illustrative worked examples could show how to assess the level of B-Class provision which can be accommodated in different market locations accounting for market viability issues.

Monitoring

- 8.32. This study has provided further evidence that can be used in support of Haringey Council's employment land policies; this will need to be updated on a periodic basis to ensure that the Council is responding appropriately to market signals.
- 8.33. The Council could carry out regular surveys of the employment areas (every two years) which provides useful information on the quantity of B class floorspace. However, the Council should ensure that the information collected is shared widely within the Council in particular with those officers that are responsible for economic development. This would help the Council develop a more proactive approach to planning for employment land and supporting economic development.

Further sector based analysis

- 8.34. The Council should undertake analysis of IDBR data at an individual premises level. This would provide the opportunity to provide detailed analysis of the business base, including emerging clusters of firms. This would also enable detailed analysis of employment densities by sector, premises and location which the Council could use when scrutinising planning applications.

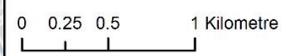


Appendix A

Map of Defined Employment Areas (DEAs)



- Strategic Industrial Location
- Locally Significant Industrial Site
- Employment Land
- Regeneration Area
- De-allocated Area



Contains National Statistics data © Crown copyright and database right [2006]

Atkins Limited[®]
 Consulting Engineers
 The Hub,
 500 Park Ave,
 Bristol,
 South Gloucestershire,
 England,
 BS32 4RZ
 Tel: +44(0)1454 662 000
 Fax: +44(0)1454 663 333
 www.atkinsglobal.com

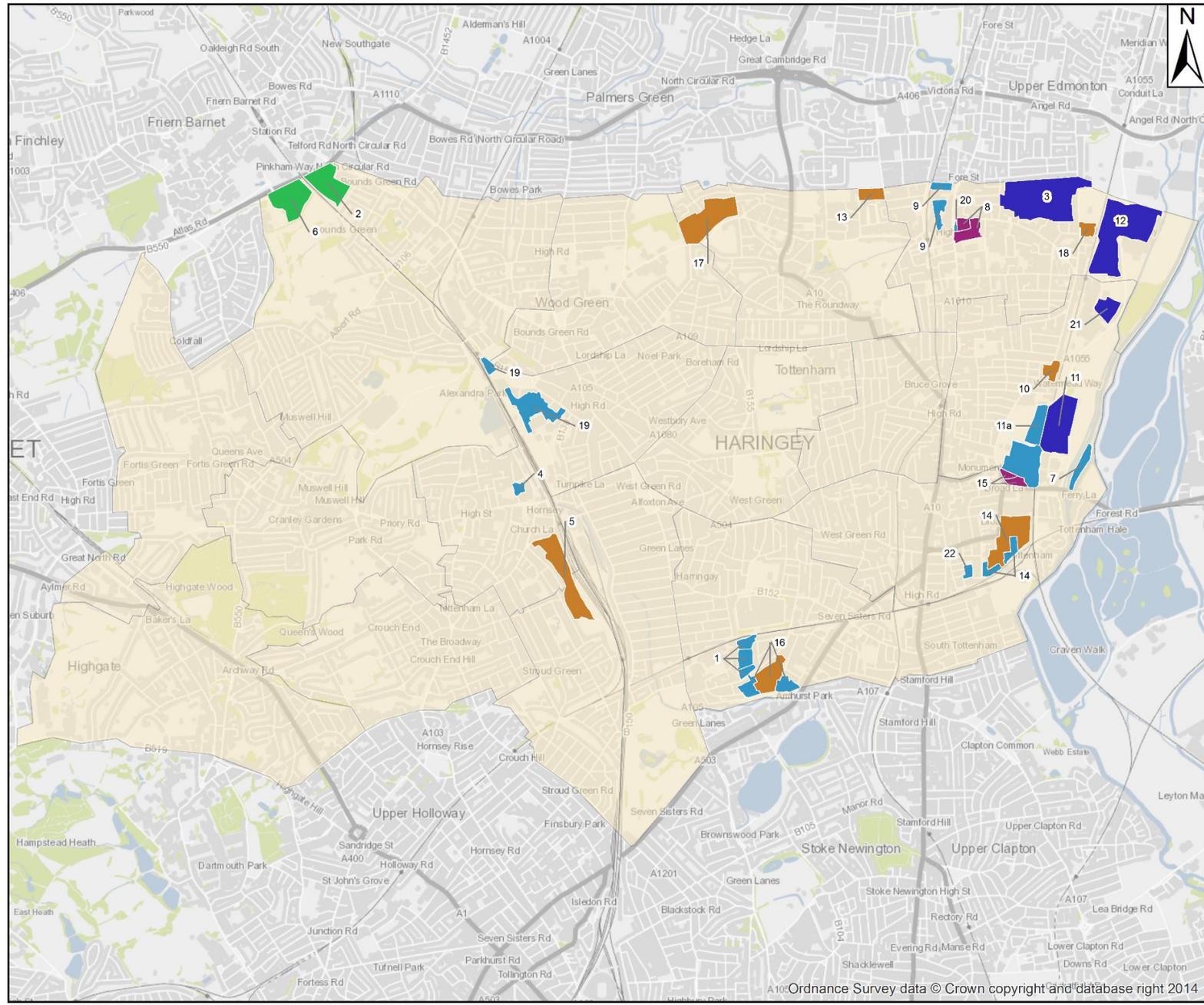
Client
 London Borough of Haringey

Project
 Haringey Employment Land Update

Title
 Haringey Defined Employment Areas (DEAs) and recommended designations

Sheet Size	Original Scale	Designed / Drawn	Checked	Authorised
A4	1:27,000	JSW	6/02	6/02
		Date: 06/02/15	Date: 09/02/15	Date: 09/02/15

Drawing Number: 5130336_ELU_HAR_DEA_02 Rev 02



© Ordnance Survey data © Crown copyright and database right 2014

Atkins Ltd.
Euston Tower
286 Euston Road
London
NW1 3AT

www.atkinsglobal.com

© Atkins Ltd except where stated otherwise.

The Atkins logo, 'Carbon Critical Design' and the strapline
'Plan Design Enable' are trademarks of Atkins Ltd.