BLACKHORSE LANE
Strategic Industrial Location

MASTERPLAN FRAMEWORK
STAGE ONE

Waltham Forest

April 2020

Introduction

Blackhorse Lane Strategic Industrial Location (SIL) is a low-density industrial area in London Borough of Waltham Forest. The popularity of the area as a place to live, work and visit is growing, which has led to greater pressure on the land and increased competition between uses.

In recent years there has a been a loss of industrial land across London. The site is designated SIL, part of a wider GLA policy to protect industrial capacity for uses that support the functioning of London's economy. Meanwhile, the nature of industry is changing, away from the large-scale manufacturing which once dominated on the site, towards artisan manufacturers and creative industries. Along with this change and increasing diversity, comes a change in space requirements.

Simultaneously, London is in the midst of a housing crisis, and Waltham Forest have the ambitious target of delivering 12,640 new homes in the next decade. Given the climate crisis, homes should be delivered in areas with high public transport accessibility; the site is within 500m from the Victoria Line and Overground at Blackhorse Road station.

In 2017, Walthamstow Wetlands opened to the public. This put the SIL in prime location being adjacent to the largest urban wetlands in Europe which operate as a fully accessible and free nature reserve. Yet the current land use does not make use of this adjacency.

Waltham Forest was the first London Borough of Culture in 2019 and has had an enormous upgrade of cycle infrastructure as part of Transport for London's Mini-Holland Programme. Blackhorse Lane is being designated a Creative Enterprise Zones by the Council to ensure artists and creative businesses can find permanent affordable space to work; businesses are supported to start-up and grow; and to help local people to learn creative sector skills and find new jobs.

All of these factors compound to increase Blackhorse Lane's desirability as a place to work, live and visit.

These competing pressures are creating interest in redevelopment and raising considerations as to the best use of this land. Industrial intensification of existing areas provides London with much-needed capacity for growth. Whilst SIL is rightly valued to ensure that London continues to operate and innovate it's form has remained largely unaltered for decades because the cost of redevelopment far outweighs the returns. The integration of other uses is key to offset the costs of intensification and unlock area-wide improvements.

A comprehensive masterplan approach is needed to guide change in Blackhorse Lane SIL in the coming decade.

The purpose of the Blackhorse Lane SIL Stage 1 Report is to give a summary of the analysis work undertaken into the nature and opportunity for industrial intensification of the SIL. This analysis can be seen in more detail in the three appendicised reports which accompany the Stage 1 report. The creation of this Stage 1 Report has followed the process set out in the *GLA's 2018 Practice Note on industrial intensification and co-location through plan-led and masterplan approaches* and sits within the context of the London Plan and Waltham Forest's Local Plan.

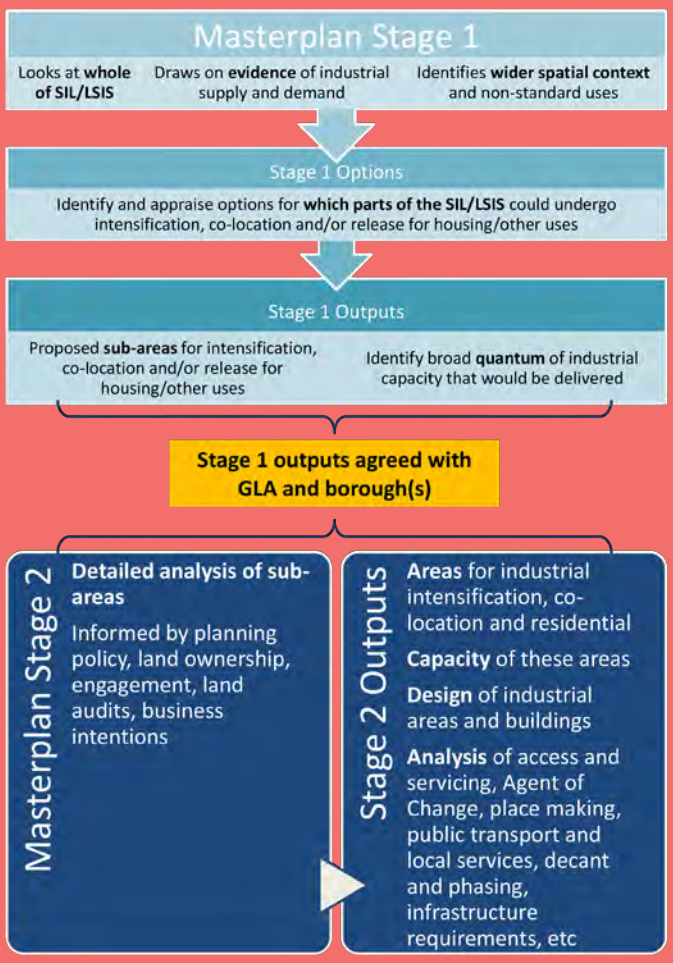


Figure 1 **The masterplan approach stages as set out in section 4 of the *GLA's 2018 Practice Note on Industrial Intensification and Co-location*. This document follows the stage 1 process.**

Chapter 1 considers the SIL's wider spatial context, including its geography, history and planning and development context.

Chapter 2 looks at strategic and local evidence of industrial supply and demand, comparing the SIL to those in the Upper Lee Valley and in London overall. It also takes a closer look at the businesses for which Blackhorse Lane SIL is home, including trends in tenancy over time and the threats they face. This chapter shares the headline findings from two more extensive pieces of work which can be found in the appendices: Turley's *London-wide SIL Assessment* and *Sector and Employment Space Assessment*.

Chapter 3 gives an overview of the *Draft Industrial Audit* which accompanies the main report as an appendix. This gives a detailed assessment of Blackhorse Lane SIL's existing conditions, assets, opportunities and constraints, including establishing quantum.

Chapter 4 considers the options for intensifying the SIL through setting out criteria, evaluating the evidence and identifying appropriate areas for intensification. It also considers different typology options.

Chapter 5 provides the main stage 1 output: a sub-area strategy for the SIL. For each sub-area opportunities and constraints are set out for consideration through a Stage 2 masterplan.

Chapter 6 sets out next steps in the masterplanning process, including an overview of planned engagement with landowners and businesses. The more detailed *Blackhorse Lane SIL Engagement Strategy* can be found in the Appendices.


GOODS IN
RTS
RTS


GRAB
&
GO


SWITCHBOARD STUDIOS


Cliffords


TAILOR
REPAIRS
CHAUDHRY FOOD & WINE
IMPERIAL MY CLEANERS
YASA


BLACK
HORSE
LANE

CONTENTS

Figure 2 **SIL area**

1 Wider spatial context

1.1 Location and physical context

1.1.1 The Blackhorse Lane Strategic Industrial Location (SIL) is located in LB Waltham Forest, cradled between the Walthamstow Wetlands to the west and Blackhorse Lane to the east. The Southern end of the SIL is less than a 250m walk to Blackhorse Road Station, with access to the Victoria Line and the Gospel Oak-Barking Overground Line.

1.1.2 The SIL is largely set amongst residential neighbourhoods. These communities are provided for by small local centres on Blackhorse Lane and in Higham Hill. Through the redevelopment of the site, there is an opportunity to expand the offer to the local community in terms of amenities, culture, recreation and leisure.

1.1.3 The SIL is set within the Lee Valley. The Lea River originates from the Chiltern Hills and flows south east, working its way through east London until it meets the River Thames at Leamouth. It is one of London's largest rivers and much has been canalised to provide a navigable route for boats.

1.1.4 A combination of factors led to the development of the Lee Valley as a significant industrial area for London: proximity to the City, prevailing winds, the availability of water power, cheap electrical power from Brimsdown Power Station and large expanses of inexpensive flat land.

1.1.5 In the last 30 years, the Lee Valley has changed and evolved. There have been initiatives to conserve and protect London's natural habitats, including establishing the Queen Elizabeth Olympic Park and the adjacent Walthamstow Wetlands, which have enhanced the valley's role for leisure and as a green corridor. At the same time, the Lee Valley has evolved from its industrial roots to become home to creative mixed-use neighbourhoods, with notable developments in Hackney Wick, Sugarhouse Island and Tottenham Hale.

1.1.6 The site is near the western edge of LB Waltham Forest, with LB Haringey on the other side of the reservoirs and LB Hackney to the south west.

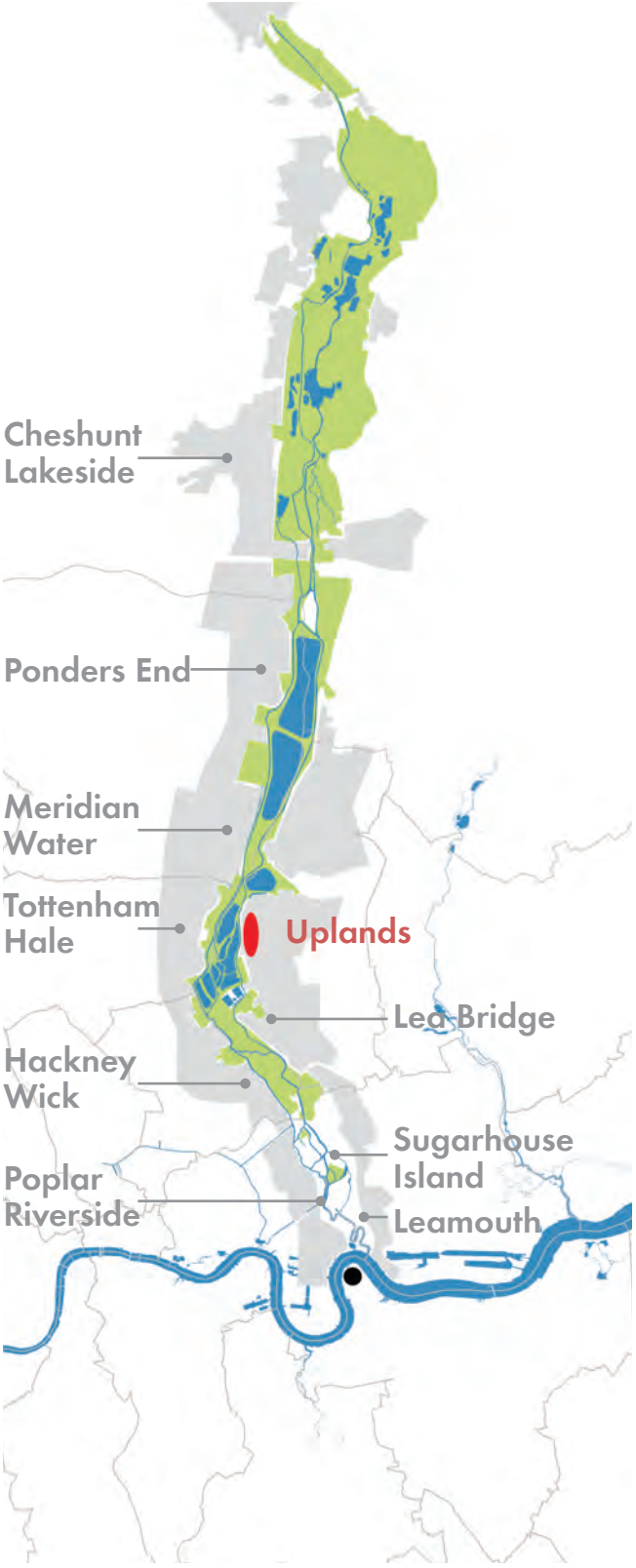


Figure 3 **Lee Valley - a dynamic corridor for enterprise and industry**

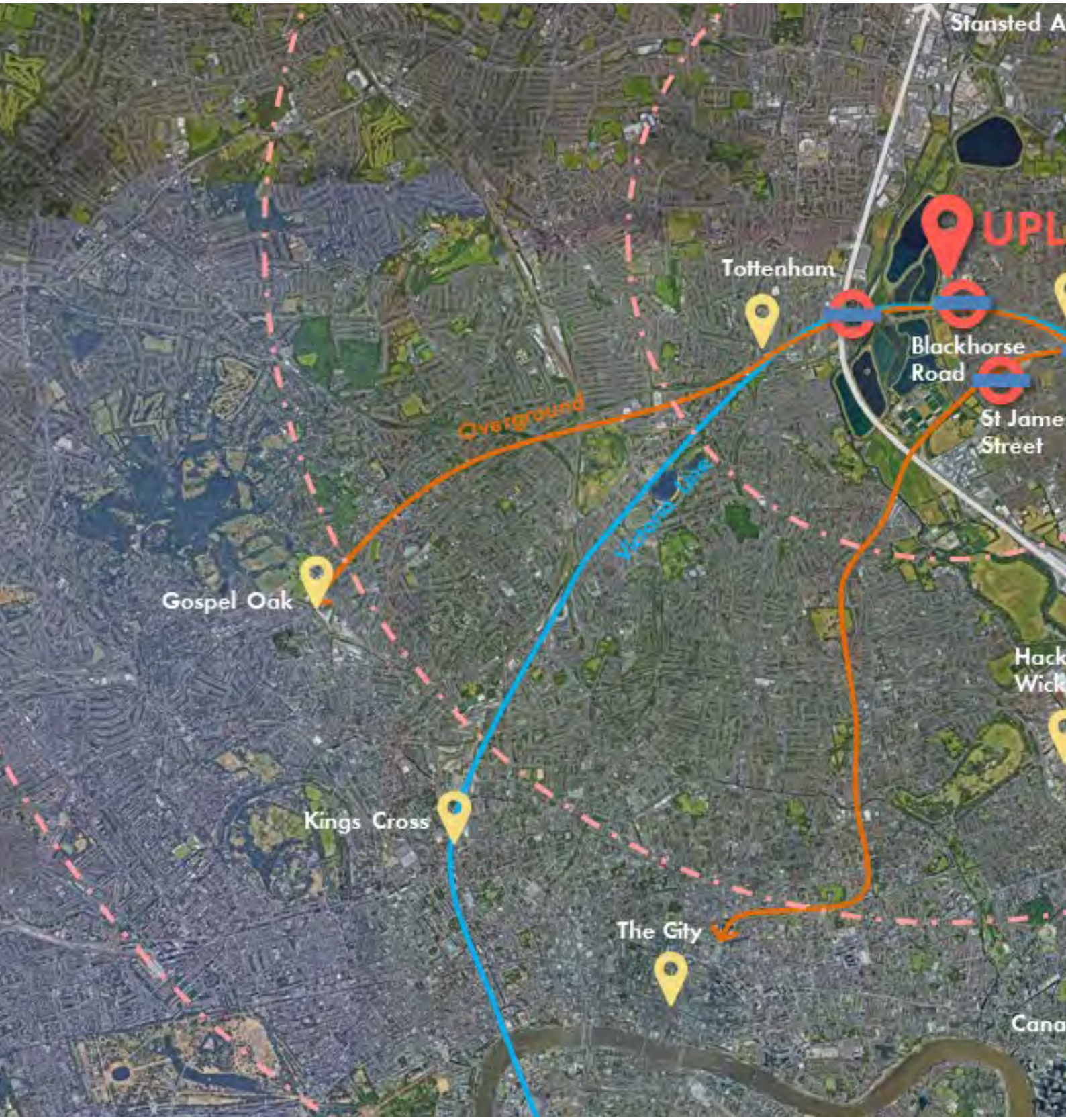
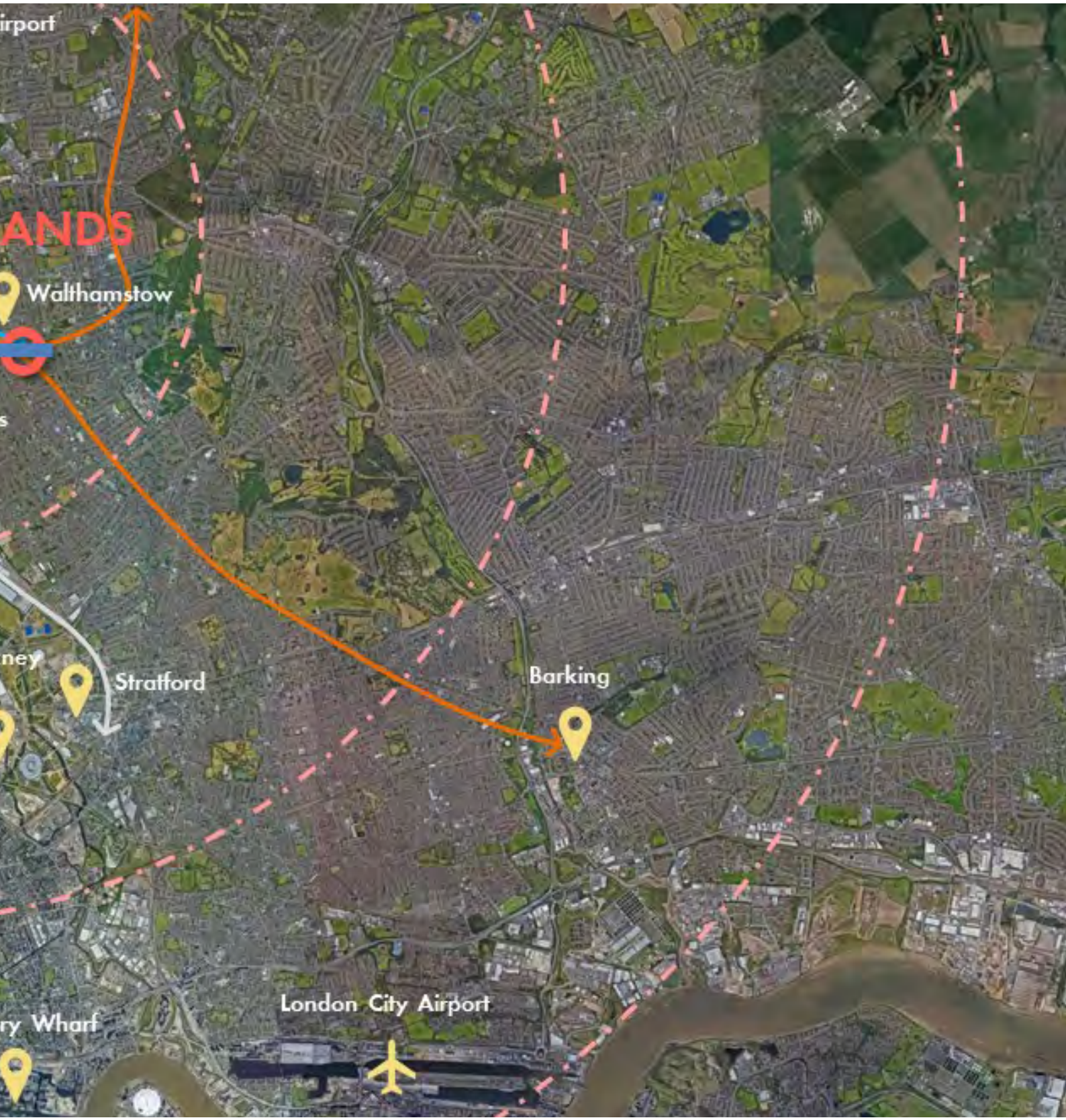


Figure 4 **A connected district**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ANDS
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ney
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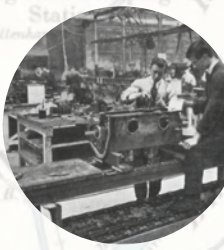
ry Wharf

1.2 The Story of Blackhorse Lane SIL



At the turn of the century, the Lee Valley was fertile ground for industry, due to its proximity to London, access to water and energy, and the prevalence of cheap, flat land. The site was developed with warehouses and mills, while also being home to allotments and sports fields.

1865

1930

"Industrial growth accelerated when connections were improved by the opening of the new Ferry Lane bridge in 1915, and completion of the North Circular Road in 1925–30."

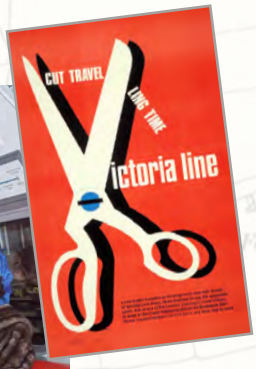
"Walthamstow remained an agricultural parish until the arable fields were enclosed and the railway was built in the mid 19th century."

1890

In 1890, nearby settlements like Tottenham were growing. East London Water Works was expanding and Blackhorse Road Station was recently built. The site remained largely undeveloped except for a few buildings along Blackhorse Lane, including Uplands House and the Royal Standard Public House.

"In the 1890s larger scale manufacturing began to move into Walthamstow. The new population provided labour, and the railway improved connectivity. The most significant growth was in electrical engineering and in manufacturing of motor vehicles, as well as a wave of new consumer goods."

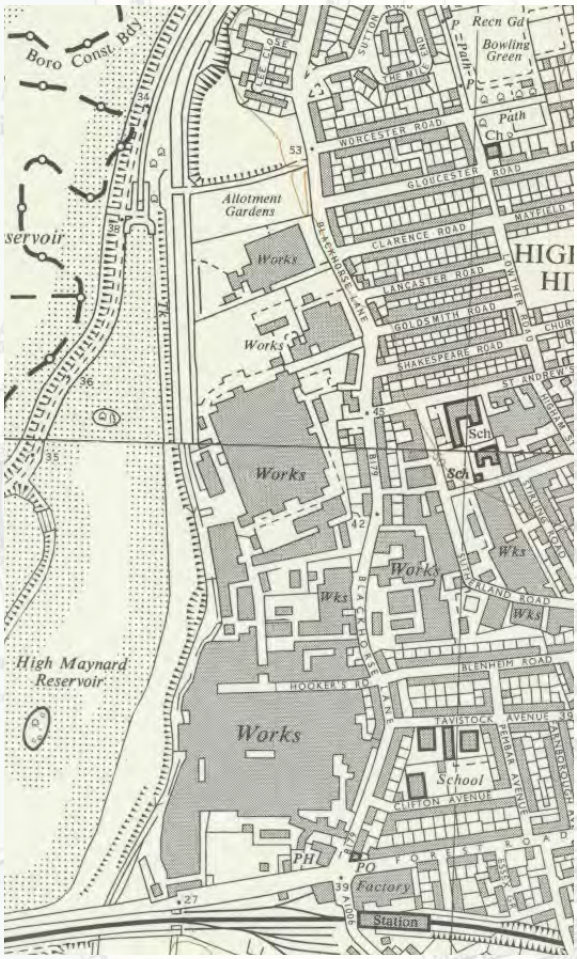
Achille Serre, a French company which brought dry cleaning to England, moved to Blackhorse Lane. At its peak it employed 1,700 people. The company was so large it ran its own fire brigade staffed by women fire fighters.



The Victoria Line opened in 1968, allowing people living around Blackhorse Road to access work, education, and culture across the capital. At the time, it was estimated that 85 million people would use the line each year - today it carries more than 200 million passengers.

1960

1950



"The Lee Valley - London's privy, workshop and backyard".

By the second half of the 20th century, the site was dense with industry. Made on site: furniture, tyres, printing machinery, dry batteries, leather goods, propellers, omnibus and motors.

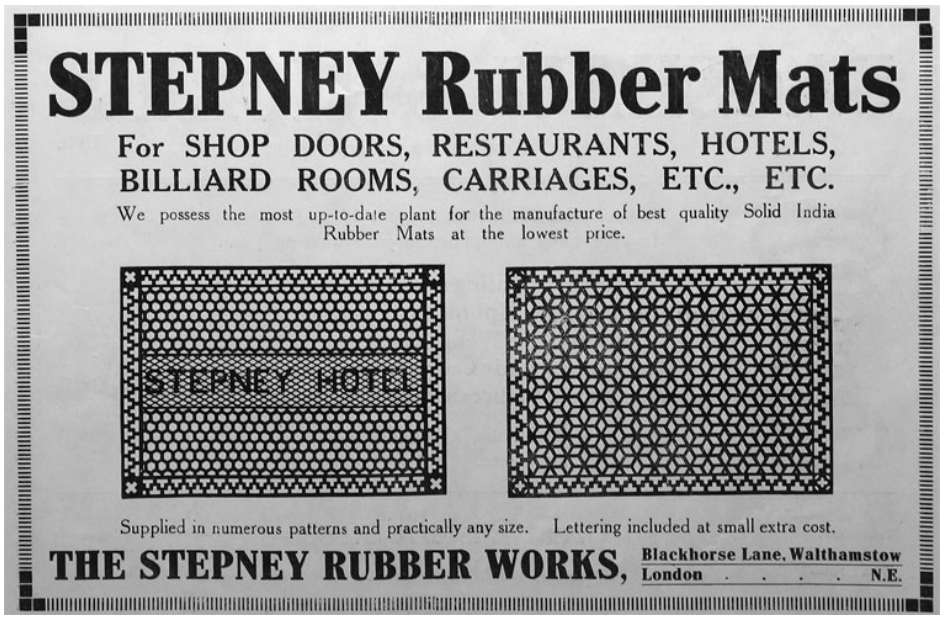
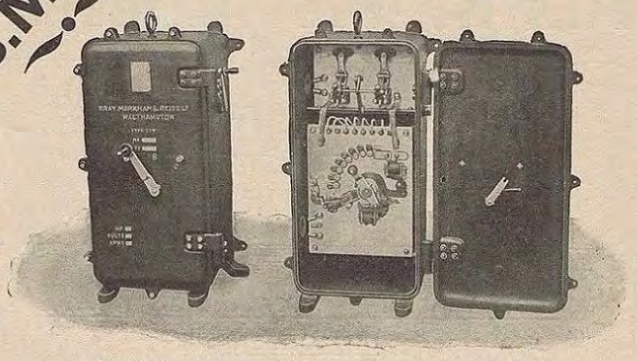


Figure 5 **Advertisements products made at Blackhorse Lane in the 20th century, © Grace's Guide to British History**

B.M.R.

'DOCKYARD' Type Ratchet Starters.

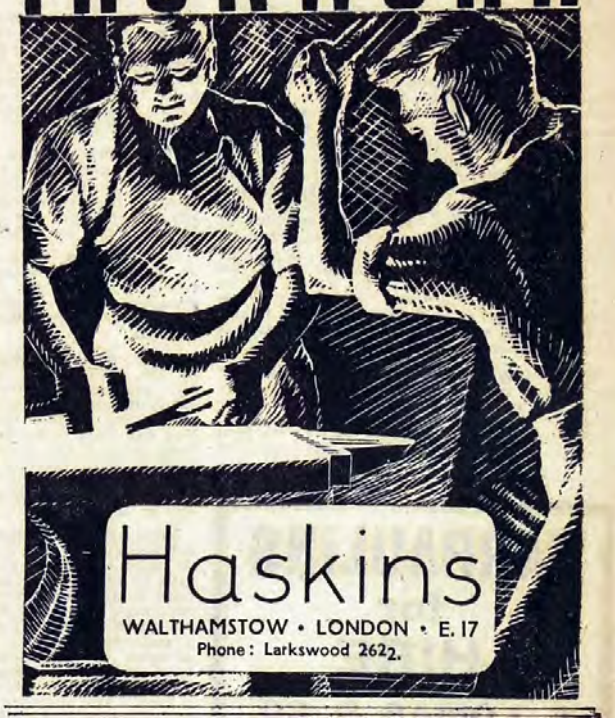


5 to 100 H.P.

Starter and D.P. Switch in Watertight C.I. Case.
SHEET 11.

BRAY, MARKHAM & REISS, LTD., Walthamstow.

IRONWORK



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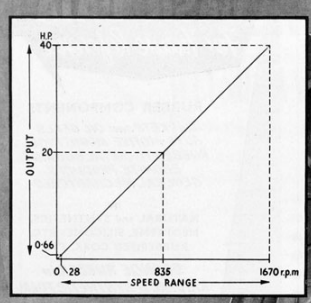

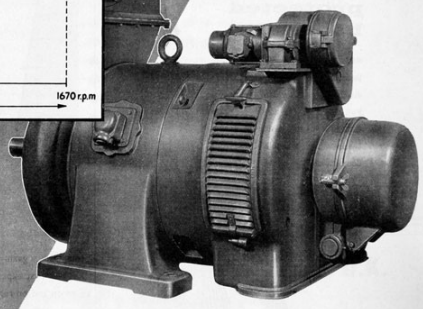

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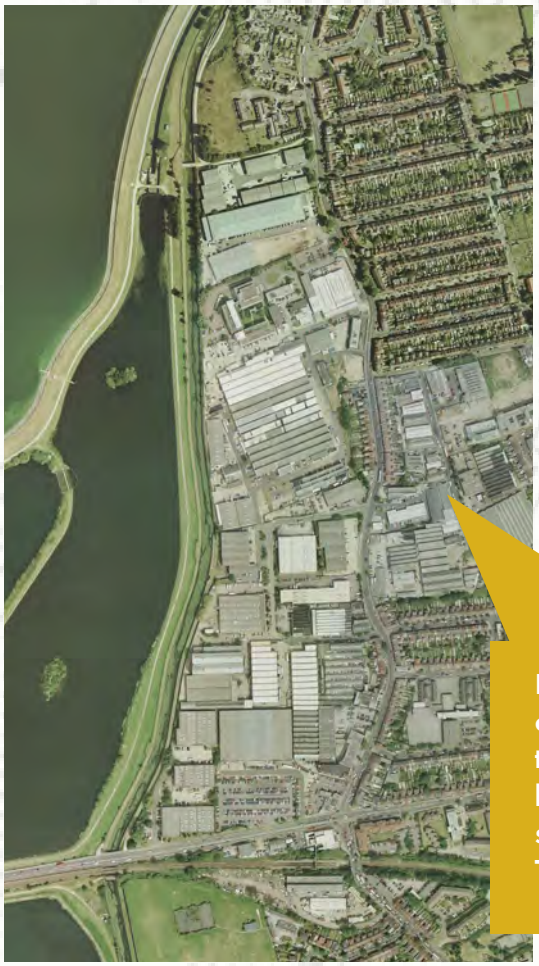
In the 1970s, the northern section of the site was intensified. Food producer Bush Boake And Allen opened a 'modern' factory complex for their operations (now home to Eden Girls School). The pond was decorated with old millstones paying tribute to industry which came before.

1970

"By 2005, construction of the Delta group was completed."

2000



"SIL was first designated in 2004 with the first iteration of the London Plan"

By the turn of the millennium, the volume of manufacturing jobs had fallen to less than 1,000 and typically non-industrial uses had started to appear including health and social work, and public sector site uses. Total employment on the site was 2,750.

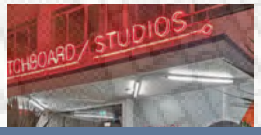
By 2010 typical industrial uses such as manufacturing and wholesale trades continued to decline in terms of job numbers. Other uses, such as transport and storage saw an increase. The diversity of uses on the site continued, including the addition of arts, and community uses.

Through the 2010s, change was occurring across the Lee Valley, with creative uses taking up inexpensive space left vacant by industry. Blackhorse Lane gradually became known for 'makers' with the arrival of businesses like the Blackhorse Workshop (2014) and Blackhorse Lane Aterliers (2016).

2010

TODAY

In 2016, Walthamstow Wetlands opened. As a prime location for new homes, the southern part of the SIL area was de-designated and began to be redeveloped.



Today, the SIL continues to be home to a diverse mix of uses and businesses. Large manufacturing has left the site, with the exit of Warren Evans in 2018. In recent years, the SIL has seen the arrival of co-working space including Switchboard Studios and Yonder, and a rise in artisan manufacturing with the arrival of businesses such as Signature Brewery, All Plants, Square Mile Roasters and Minor Figures. LB Waltham Forest has designated Blackhorse Lane as a Creative Enterprise Zone.

1894

1932

2018

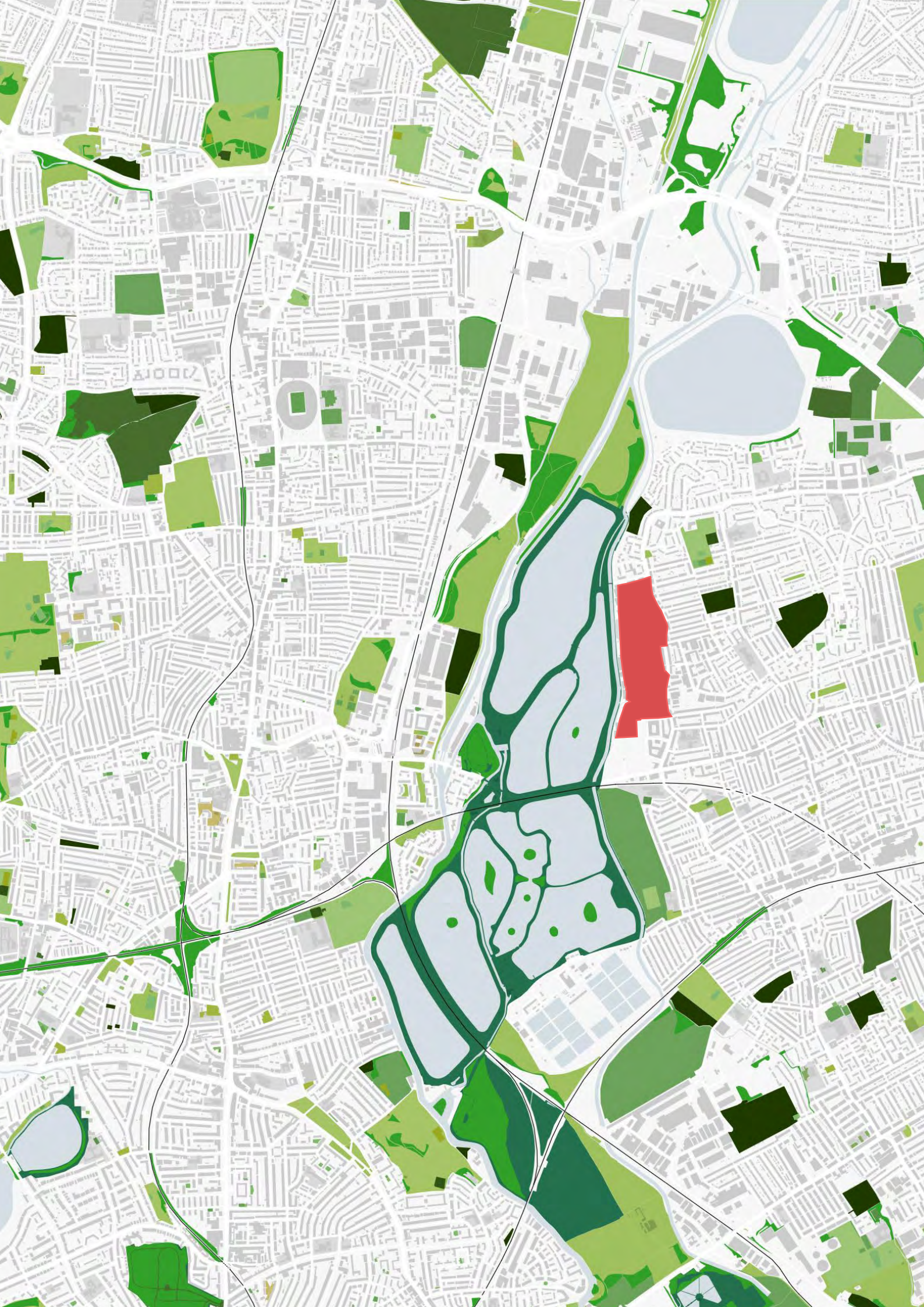
1.3 History and heritage

1.3.1 Any redevelopment should be informed by an area's industrial heritage. While the SIL area has a rich industrial history, there are no listed buildings on site. Nearby heritage assets include the locally listed Marine House which was the pumping station for the East London Waterworks Company erected in 1894, the Grade II listed Ferry Boat Inn and locally listed 16 Blackhorse Lane. Building on the area's industrial heritage, a more active relationship to the water and to the surrounding residential neighbourhoods should be re-created. In addition, the SIL has a strong history of making which could be reinterpreted and celebrated through future building or public realm design, and use.

1.3.2 As can be seen from historic maps, the site developed relatively quickly in the first half of the 20th century. The structure of the site still resembles that from 1930, with the street network and grain remaining largely unchanged. Since then, the north part of the site has been intensified, with the construction of a 'modern' factory complex (now Eden Girls School), as well as the construction of Delta Group and Lockwood Way.

1.3.3 It is notable that this later wave of development demonstrates a change in typology and unit size, away from large-scale warehouses towards smaller units and multistorey buildings. Similarly, existing large warehouses have been subdivided into much smaller units. This is reflective of the changing nature of industry in the area, away from large-scale manufacturing. Whilst some more traditional industrial uses remain in the last ten years, there has been a shift towards artisan manufacturing on site with the arrival of businesses like Square Mile Roasters, Wildcard Brewery, Replica, Minor Figures and Signature Brewery.

Figure 7 **Listed buildings in the area**



1.4 Green and open space

1.4.1 The SIL area benefits from a notable amount of green and open space nearby. Notably:

- Walthamstow Wetlands which operates as a 211ha nature reserve (adjacent)
- Higham Hill Park which includes open parkland, a playground, basketball courts, tennis courts, a community cafe and a dog run area (300m)
- Trencherfield Gardens Allotments (300m)
- Higham Hill Common Allotments (650m)
- Douglas Eyre Playing Fields, which include adult, junior and mini football pitches, a cricket pitch a full-size artificial turf football pitch and an athletics track (1km)
- River Lee Navigation and towpath (1km)
- Epping Forest (3km)

1.4.2 Any redevelopment of the SIL area should aim to improve access and integration with Walthamstow Wetlands and with the wider green network, as well as providing local play and amenity space in line with policy requirements for new developments.

LONDON'S FIRST BOROUGH OF CULTURE

WALTHAMSTOW WETLANDS

HOME OF MAKERS

WALTHAMSTOW MINI-HOLLAND

1.5 Planning policy context

Development Plan

1.5.1 The site is located within the London Borough of Waltham Forest (LBWF). The adopted Development Plans for the site comprise:

- London Plan (2016);
- Upper Lee Valley Opportunity Area Planning Framework (OAPF) (2013);
- LBWF Core Strategy (2012);
- LBWF Development Management Policies (2013)
- LBWF Policies Map (2013); and
- LBWF Blackhorse Lane Area Action Plan (2015).

Emerging Policy

1.5.2 It is important to note the emerging policy framework in which we are working that comprises:

- Draft London Plan (Intend to Publish Version, 2019)
- LBWF Local Plan (Regulation 18 Version, 2019)

Industrial Policy

1.5.3 This Framework has evolved by taking in to consideration the key industrial policy context as set out by the Development Plans, as well as the emerging policies noted.

London Plan

1.5.4 The site is a designated SIL, as identified in Table A3.1 in the adopted London Plan. Policy 2.17 states that the Mayor will, and the Boroughs should, *"promote, manage and, where appropriate, protect the strategic industrial locations (SILs)… as London's main reservoirs of industrial and related capacity, including general and light industrial uses, logistics, waste management and environmental industries (such as renewable energy generation), utilities, wholesale markets and some transport functions"*.

1.5.5 The Plan (paragraphs 2.80-2.81) notes that typically SILs are located close to the strategic road network and many are also well located with respect to rail, river and canals and safeguarded wharves which can provide competitive advantage and address transport objectives and are important in supporting the logistics system and related infrastructure essential to London's competitiveness.

Upper Lee Valley OAPF

1.5.6 The Upper Lee Valley OAPF targets facilitating significant growth in both jobs and new homes in the Blackhorse Road area.

Emerging London Plan

1.5.7 Policy SD1 sets out the Mayor's approach to ensuring Growth Corridors and Opportunity Areas (OA) fully realise their growth and regeneration potential and confirms (part B(6)) boroughs should support and sustain SILs by considering opportunities to intensify and make more efficient use of land in SIL. The emerging Plan states (paragraph 2.1.29) that the Lee Valley OA provides opportunities for growth in, inter alia, Blackhorse Lane including high density development. The Plan seeks to *'ensure that industrial, logistics and commercial uses continue to form part of the overall mix of uses in the area, with no net loss of industrial floorspace capacity, and that opportunities for intensification of industrial land and colocation of industrial and residential uses are fully explored. Tottenham and Walthamstow contain clusters of creative industries which should be protected and supported'* (paragraph 2.1.33).

1.5.8 Of importance, draft policy E4 of the emerging London Plan states that there should be no net loss of SIL. Further, Policy E4 states that there will be 'no net loss' of industrial floorspace capacity within designated SIL and LSIS (Part C of the policy). It goes on to state that "*any release of industrial land…to achieve wider planning objectives…should be facilitated though the processes of industrial intensification, co-location and substation"* as set out in Policy E7.

1.5.9 Part D confirms that retention, enhancement and provision of additional industrial capacity will be prioritised in locations that:

- Are accessible to the strategic road network and/or have potential for the transport of goods by rail and/or water transport.
- Provide capacity for logistics, waste management, emerging industrial sectors or essential industrial-related services.
- Provide capacity for micro, small and medium-sized enterprises.
- Are suitable for 'last mile' distribution services to support large-scale residential or mixed-use developments.
- Support access to supply chains and local employment in industrial and related activities.

Figure 8 **Planning policy documents**

1.5.10 Any release of industrial capacity should be focused in locations which are well connected by public transport, walking and cycling (Part E).

1.5.11 Draft Policy E5 Part B (3) encourages boroughs in their Development Plans to define the detailed boundary of SILs and:

1.5.12 *'Explore opportunities to intensify and make more efficient use of land in SILs in Development Plan reviews and through Opportunity Area Planning Frameworks in collaboration with the GLA and other planning authorities within and outside London (Policy E7 Industrial intensification, co-location and substitution)'.*

1.5.13 *The policy goes on to state that other uses (including residential and retail) "should be refused except in areas released through a strategically coordinated process of SIL consolidation. This release must be carried out through a planning framework or Development document review process and adopted as policy in a Development Plan or as part of a coordinated masterplanning process in collaboration with the GLA and relevant borough."*

1.5.14 Part E states that proposals within SILs should not compromise the integrity or effectiveness of these locations in accommodating industrial activities and that residential development should be designed (through layouts, access, orientation, servicing, public realm, air quality and soundproofing) to ensure that the industrial activities are not compromised.

1.5.15 Part B of Policy E7 notes that intensification can be used to facilitate the consolidation of an identified SIL or LSIS to support the delivery of residential and other uses, such as social infrastructure, or to contribute to town centre renewal. This approach can, inter alia, be considered as part of a co-ordinated masterplanning process in collaboration with the GLA and relevant borough, but not through ad hoc planning applications.

1.5.16 There is further clarification on this point in the supporting text at paragraph 6.7.2 where it states that:

1.5.17 *"6.7.2 Whilst the majority of land in SILs should be retained and intensified for the industrial-type functions set out in Part C of Policy E5 Strategic Industrial Locations (SIL), there may be scope for selected parts of SILs or LSISs to be consolidated. This should be done through a carefully co-ordinated plan-led approach (in accordance with parts B, C and E of Policy E7 Industrial Intensification, co-location and substitution to deliver an intensification of industrial and related uses in the consolidated SIL or LSIS and facilitate the release of some land for a mix of uses including residential. Local Plan policies' maps and/or OAPFs and masterplans should indicate clearly:*

1.5.18 *(i) the area to be retained and intensified as SIL or LSIS (and to provide future capacity for the uses set out in Policy E5 Strategic Industrial Locations (SIL) and Policy E6 Locally Significant Industrial Sites) and*

1.5.19 *(ii) the area to be removed released from SIL or LSIS (see illustrative examples in Figure 6.3). Masterplans should cover the whole of the SIL or LSIS, and should be informed by the operational requirements of existing and potential future businesses.*

Secretary of State's Directions March 2020

1.5.20 The Secretary of State ("the SoS") responded on the 'Intend to Publish' version of the emerging London Plan on 13th March 2020, the modifications set out must be incorporated before the London Plan can be published unless the Mayor's elects to make further changes and restart the examination process. The SoS's suggested modifications seeks to introduce greater flexibility in attempt to encourage more locally led responses.

1.5.21 Of particular relevance is proposed changes to the emerging policies on employment land within London. The covering letter states with respect to Industrial land: *"The Inspectors considered your industrial land policies to be unrealistic; taking an over-restrictive stance to hinder Boroughs' abilities to choose more optimal uses for industrial sites where housing is in high demand. I am directing you to take a more proportionate stance - removing the 'no net loss' requirement on existing industrial land sites [our emphasis] whilst ensuring Boroughs bring new industrial land into the supply."*

"Redevelopment of existing employment land at the Uplands Business Park area to create a new sustainable neighbourhood, providing high density employment-led mixed use development with Light Industrial/ Manufacturing/Production space, workspace and appropriate cultural uses; alongside new quality homes"

LBWF Draft Local Plan

1.5.22 Through Direction DR4 on the core London Plan Employment Policies (E4-E7), Policy E4 (part C) is revised to remove the requirement and principle that there is a no net loss of industrial capacity within designated SIL/LSIS in London and instead a new supporting paragraph added that *"Where possible, all Boroughs should seek to deliver intensified floorspace capacity in either existing and/or new appropriate locations supported by appropriate evidence".*

1.5.23 It should be noted as of March 2020, the Mayor's response to these Directions is yet to be published publicly.

Adopted Local Policy

1.5.24 Core Strategy Policy CS8 states LBWF will promote, protect and manage its defined SILs. DMP Policy DM18 confirms Class B2 General Industry, Storage/ Distribution (Class B8) and Class B1 small scale ancillary Offices will be supported in SILs and the loss of SIL to any alternative uses will be resisted.

1.5.25 Blackhorse Lane AAP Policy BHL6 sets out the approach to employment land within the AAP. The AAP includes the disposal of SIL land to the south of the Uplands Business Park to facilitate the Borough's aspirations for the growth around Blackhorse Road station.

Emerging Local Policy

1.5.26 Draft Local Plan Policy 3 sets out LBWF's approach to the location and management of growth in the Borough across three sub-areas and a series of strategic locations. Part A(ii) addresses the sub-area of 'Central Waltham Forest' confirming 8,000 homes and 1,600 jobs will be delivered in the strategic locations including Blackhorse Lane. Part E confirms that development will be expected to be planned and implemented in a coordinated way guided by inter alia, Masterplans and Planning Briefs where appropriate.

1.5.27 Draft Local Plan Policy 15 deals specifically with Blackhorse Lane and sets a number of priorities which development is expected to deliver. This includes, inter alia:

- Delivering a minimum of 1,650 new homes;
- Designating the area as a Creative Enterprise Zone in line with Draft London Policy HC5;
- Intensification of the existing employment floorspace;
- Developing, enhances, protects and manage new and existing creative workspace, including providing affordable workspace;
- Redevelopment of existing employment land at the Uplands Business Park area to create a new sustainable neighbourhood, providing high density employment-led mixed use development with Light Industrial/Manufacturing/Production space, workspace and appropriate cultural uses; alongside new quality homes;
- Improvement and enhancement of visitor and cultural attractions of Blackhorse Lane area (e.g. Walthamstow Wetlands, Blackhorse Workshop and Gnome House) and supports the development of new cultural venues with the area;
- Encouraging the temporary use of vacant buildings (including heritage assets) and sites for creative workspace and activities;
- Place-making principles based on the character and local distinctiveness of Blackhorse Lane, including heritage, cultural and green assets;
- Improving public realm and public spaces across the area and walking and cycling accessibility, connectivity, permeability and legibility to identified routes; and
- Improving the sense of arrival to Blackhorse Lane, as a gateway into the borough, particularly at the junction of Forest Road/Blackhorse Lane.

1.5.28 Policy 5 of the draft Plan sets out the general principles for mixed use development and intensification, with parts J-K addressing intensification of development involving housing and employment uses.

1.5.29 The site is designated as SIL and protected under draft Policy 37 (which protects all designated employment land). Draft Policy 38 addresses the regeneration of parts or whole areas of SIL and Borough Employment Area (BEA). The policy confirms suitable non-employment uses for co-location include C3, A1, A3, D1 and D2 and *"other uses that will serve the needs of the occupiers of such development".* The supportive text also identifies (table 9.1) Blackhorse Lane SIL as a suitable employment site for co-location.

1. Mandora (Site 1)

2.Blackhorse Mills (Site 2)

3.Forest Works (Site 3)

4.Blackhorse Point (Site 4)

5.Blackhorse Yard (Site 5)

Site boundary

Existing Industrial Buildings

New development

Underconstruction

Figure 9 **Recent and upcoming developments in the area**

1.6 Wider development context

1.6.1 It is clear from the current development pipeline in Blackhorse Lane that the area is undergoing significant change. The following five sites are all located in close proximity to the Blackhorse Lane SIL and will introduce multiple high density buildings with a range of residential, employment, commercial and community uses proposed.

Site 1: Mandora Site

1.6.2 Planning permission (ref. 2013/0554) was granted in 2014 for approximately 519 student beds and up to 484 residential units for the site known as Mandora Site comprising land at 3, 5 and 7 Blackhorse Lane land to south of Hookers Road, west of Blackhorse Lane. The approved buildings vary between 3 and 8 storeys in height. The scheme is being implemented. The site is not within the Blackhorse Lane SIL, but is part of the site referred to as 'Blackhorse Road station hub and waterfront' in the Upper Lee Valley OAPF and Blackhorse Lane AAP, and is allocated as an opportunity for uses including new homes, commercial space, leisure and retail.

Site 2: Blackhorse Mills

1.6.3 In August 2017, planning permission was granted for the redevelopment of this industrial site to the north of Forest Road adjacent to the Walthamstow Wetlands, to the west of Blackhorse Lane and the station. The redevelopment comprised 440 residential units and 2,069sqm of flexible commercial space ranging from 2 to 16 storeys with associated works (Ref: 161705). The site is also located within the Blackhorse Lane AAP area. In 2018 an amendment application was approved which increased the number of dwellings to 479, introduced an outdoor swimming pool and increased building heights as well as other minor amendments (Ref: 173525).

Site 3: Forest Works

1.6.4 Planning permission was granted October 2017 for the demolition of industrial/warehouse units and redevelopment comprising 337 residential units and 1,750sqm of commercial floorspace, 19 car parking space and hard and soft landscaping and access roads (Ref: 170893). Heights were granted between 2 and 10 storeys. The site is also located within Blackhorse Lane AAP and is included within the 'Station Hub and Waterfront' opportunity site.

Site 4: Blackhorse Point

1.6.5 Planning Permission (Ref. 182917) was granted in December 2018 for the redevelopment of the existing NCP Carpark adjacent to Blackhorse Road Station involving demolition of existing structures and the construction of a building ranging from 5 to 21 storeys in height comprising 350 residential units (Use Class C3) approximately 1,650 sqm of flexible commercial floor space (Use Class A1 to A4, B1, D1 or D2), community cycle hub, ancillary refuse stores, servicing, parking, landscaping and associated public realm works.

Site 5: Blackhorse Yard

1.6.6 A planning application (ref. 183424) was submitted in October 2018 for the comprehensive redevelopment of the site to provide a series of buildings ranging in height from 1 to 15 storeys to provide 359 new affordable homes in a mix of one, two and three bedroom units (Use Class C3) 2,569sqm of non-residential floor space comprising of 720sqm of flexible floor space (Use Class A1 and/or A2 and/or A3 and/or A4 and /or B1 and /or D1 and/or D2), 532sqm of flexible floor space (Use Class B1 and/or D1) and 1,313sqm of floors pace (Use Class B1), car parking, cycle parking, landscaping, highways and utilities works. The site is allocated as a Borough Employment Area. But is also part of the Sutherland Road allocation for mixed-use redevelopment in the Upper Lee Valley OAPF. The application is yet to be approved but has received it's GLA Stage 1 Report recommendations.

2 Economic drivers

2.1 London-wide SILs

The Role of SIL

2.1.1 SILs are defined by the Greater London Authority (GLA) as *'the capital's main reservoir of land for industrial, logistics and related uses'* which *'support the functioning of London's economy'* (Draft new London Plan, Policy E5).

2.1.2 The Draft new London Plan states that *'innovations to make more effective use of land in SILs are encouraged….This should take into account the potential to rationalise areas of SIL that are currently in non-industrial and related uses or contain transport or utilities uses which are surplus to requirements'.*

2.1.3 The London Plan identifies the appropriate industrial uses for SIL:

2.1.4 Both heavy industry and lighter industrial or industrial related uses are given merit as SIL occupiers, each contributing to London's dynamic economy. Flexible hybrid space is also recognised as important to accommodate services that support the wider London economy and its population. There is no one size fits all SIL approach and rather each SIL's merits should be considered in understanding and delivering their unique legacy.

2.1.5 There are 55 SILs across London. These can be grouped into five Industrial Market Areas:

- Thames Valley – 20 SILs across 1,672 ha.
- Park Royal/Heathrow – 14 SILs across 1,152 ha.
- Lee Valley – 8 SILs across 487 ha (in which Blackhorse Lane is located).
- Wandle Valley – 8 SILs across 414 ha.
- Central Services Area – 5 SILs across 172 ha.

SIL should make provision for the varied operational requirements of:

1) light and general industry (Use Classes B1c and B2)

2) storage and logistics/distribution (Use Class B8) including 'last mile' distribution close to central London and the Northern Isle of Dogs, consolidation centres and collection points

3) secondary materials, waste management and aggregates

4) utilities infrastructure (such as energy and water)

5) land for sustainable transport functions including intermodal freight interchanges, rail and bus infrastructure

6) wholesale markets

7) emerging industrial-related sectors

8) flexible (B1c/B2/B8) hybrid space to accommodate services that support the wider London economy and population

9) low-cost industrial and related space for micro, small and medium-sized enterprises (see also Policy E2 Providing suitable business space)

9A) research and development of industrial and related products or processes (falling within Use Class B1b).

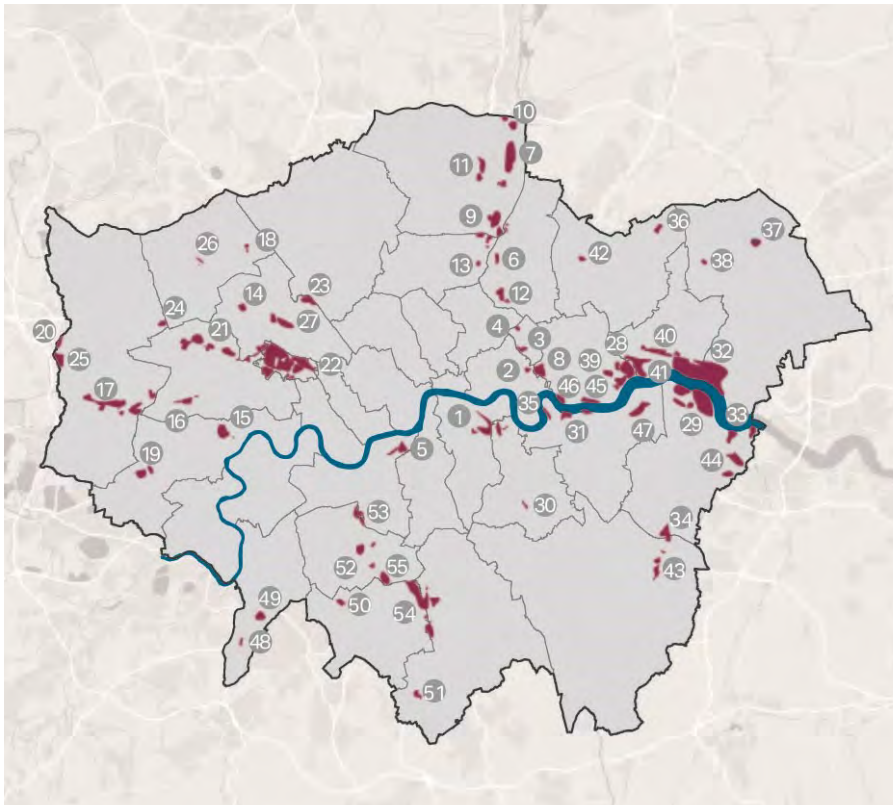


Figure 10 **Strategic Industrial Locations in London including Blackhorse Lane (number 6), Source: GLA Planning**

"Innovations to make more effective use of land in SILs are encouraged....This should take into account the potential to rationalise areas of SIL that are currently in non-industrial and related uses or contain transport or utilities uses which are surplus to requirements."

Draft London Plan

2.1.6 We have carried out an assessment of all of London's SILs drawing on national data sets and a desk-based audit (see Appendix). The average SIL is large in scale at 70.9ha and half of its jobs are classed as industrial uses. The majority of SILs (43) have some form of heavy industry on site and over half (33) include a utilities function[1]. This indicates a strong alignment with the policy on intended industrial role of these SILs.

2.1.7 Only 19 SILs are within 1 mile of the Strategic Road Network making them particularly suitable for logistics occupiers. In terms of the potential for modal shift, almost half of SILs (25) are in proximity to the national rail network and a lower number (20) are in proximity to water which has the potential to be used for freight.

2.1.8 SIL's were also reviewed in terms of their propensity to support diversification of commercial uses. The average SIL has a very low presence of service-orientated (footfall) uses[2]. Twenty-two SILs (40%) are located in an Opportunity Area, though fewer are located in a Creative Enterprise Zone (8, or 15%) making this designation more unique for SILs. The average business start-up rate for the boroughs in which SILs are located is 16.0% which is in line with the average across London as a whole (15.9%).

2.1.9 The majority of SILs do not have the attributes which would suggest suitability of diversification away from economic uses altogether, with most located adjacent to other industrial or business activities (such as business or retail parks). A minority are in town centre locations and less than a third of SILs (27%) are within a Housing Zone.

2.1.10 The average SIL has a relatively low PTAL rating of 1.7, though 9 SILs have an average PTAL below 1 indicating very poor public transport accessibility. A PTAL rating of 3-6 is identified by the GLA as needed to support residential development. Park Royal and Tottenham Hale SILs are the only SILs with an average PTAL of 4 or above.

[1] There may exist smaller utilities functions which do not support employment on-site such as sub-stations
[2] Based on a desk-based observational audit

2.2 Lee Valley SILs

2.2.1 Blackhorse Lane SIL is one of 8 SIL areas in the Lee Valley Industrial Market Area. The Lee Valley, and Upper Lee Valley in particular, is a focus for industrial activity. Its categorisation as an Opportunity Area (Upper Lee Valley) in part is reflective of this role.

2.2.2 The Lee Valley has the largest number of SILs which are intersected by Opportunity Areas, Housing Zones and Creative Enterprise Zones of the Industrial Market Areas of London. The Lee Valley SILs intersect with all three designations 12 times.

2.2.3 In terms of categorising Lee Valley SILs:

- Brimsdown, British Gas Site/Cody Road, Central Leeside Business Area and Lea Bridge Gateway SILs show particularly strong characteristics supporting industrial functions;
- Blackhorse Lane, Lea Bridge Gateway and Tottenham Hale SILs demonstrate a broader economic role and contribution to the London economy than solely industrial functions; and,
- Blackhorse Lane and Tottenham Hale SIL have attributes which would particularly support introduction of non-commercial development.

2.2.4 Industrial developments across the Upper Lee Valley differ significantly in their economic role and function[3]. The North East of Enfield is home to large logistics and distribution uses with larger and new building stock than elsewhere in the Opportunity Area. South East Enfield is characterised by large single occupiers such as Eco-Park waste management site and Coca-Cola. Blackhorse Lane and Lee Bridge are occupied by a larger number of SMEs including a high proportion of manufacturing, artists and makers occupying older and smaller industrial stock. Tottenham is characterised by small-scale manufacturing. Therefore a 'one-size-fits-all' industrial policy is not appropriate in this context.

[3] Mayor of London (2016) Industry in the Upper Lee Valley

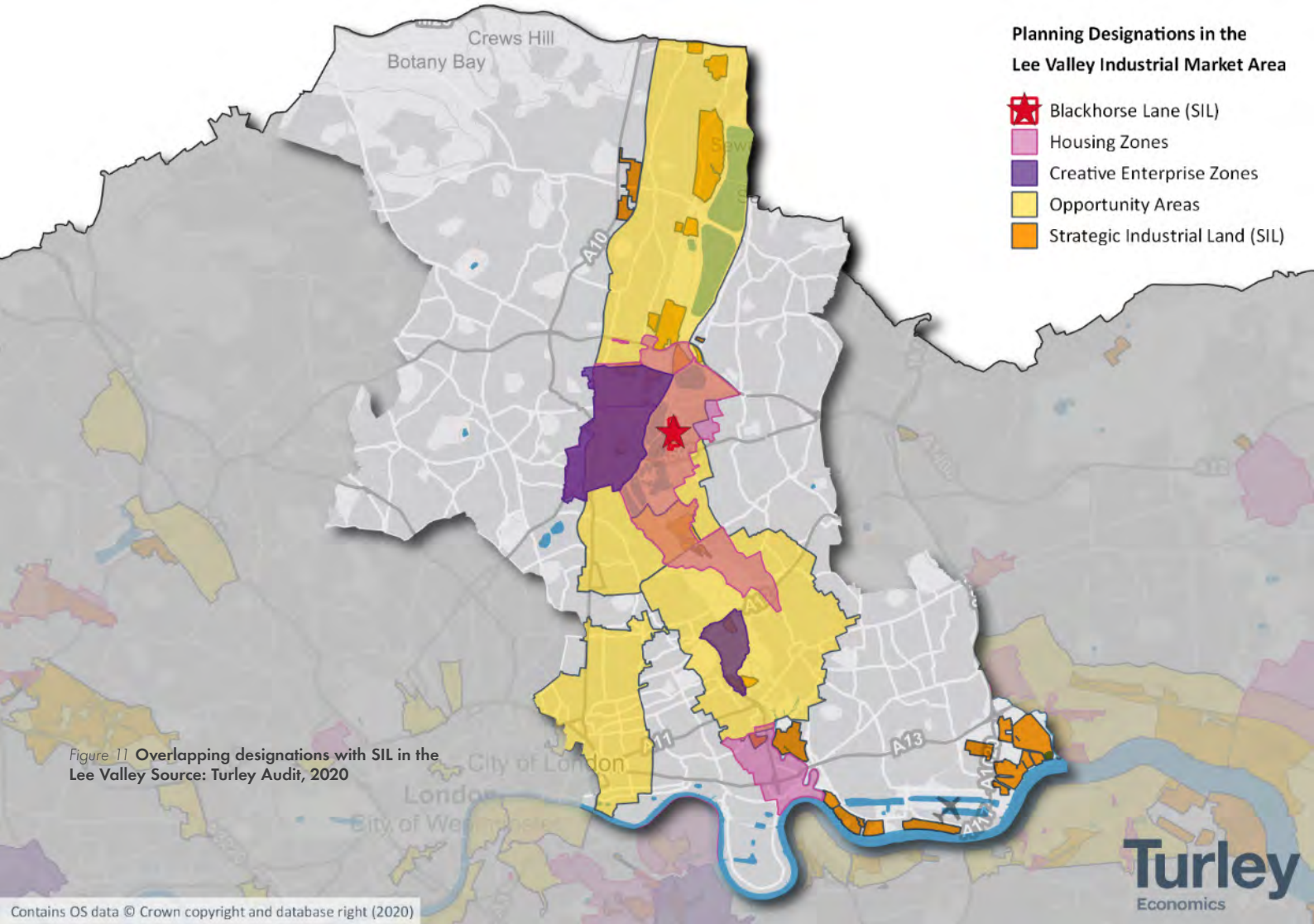


Figure 11 **Overlapping designations with SIL in the Lee Valley Source: Turley Audit, 2020**

2.3 Blackhorse Lane SIL

2.3.1 Blackhorse Lane SIL comprises just 0.4% of London's SIL land. Its current occupiers are influenced by its industrial heritage (it has above average industrial employment representation, with particular strengths in manufacturing and recorded media) and its future direction towards more creative, artisan industry. It has the second highest density per ha and third largest number of service-orientated (footfall) businesses of all SILs[4] demonstrating diversification of traditional uses. In particular, as considered in the next section, the SIL has demonstrated organic change with the introduction of more creative artisan uses, some of which are linked to industrial functions such as food and drink manufacturing (for example, brew pubs). It has attracted uses not typically considered industrial, such as co-working space.

2.3.2 In contrast to the majority of SILs, Blackhorse Lane does not serve a utilities employment function making it distinct from the 40 SILs which do and has limited heavy industry.

2.3.3 It is one of only three SILs which benefit from the combined planning designations of Opportunity Zone (Upper Lee Valley), Housing Zone and Creative Enterprise Zone (LBWF designation, with the Council making an application for a GLA designation). Of these, it is the only SIL which does not benefit from proximity to rail and water for potential freight use, nor is it within particular proximity to the Strategic Road Network, being 1.8 miles away. It is within an area identified for expansion of the Blackhorse Lane neighbourhood centre to serve the area's growing population and workforce and benefits from an above average PTAL rating across the site, with areas in the south of the site having a PTAL of 3 due to the presence of Blackhorse Lane tube and rail stations. LB Waltham Forest has the highest business start-up rates of the London borough's containing SILs, demonstrating an enterprising economic context.

2.3.4 The Walthamstow Wetlands to the west offers a unique selling point with regards to its SSSI and Special Protection Area (SPA) value. Blackhorse Lane is one of only three SILs with such a reservoir location (and the only classed as an SPA), the others being much larger in size and with a lower propensity for non-industrial uses. Leisure access to the Wetlands provides a particular USP.

2.3.5 These factors combined indicate the potential to consider 'innovations to make more effective use' of the SIL, in line with Policy E5 of the Draft new London Plan. Introducing a wider range of uses, including residential, will not detract or hinder the operation of the SIL but would enhance the economic contribution it is able to make to LB Waltham Forest and London.

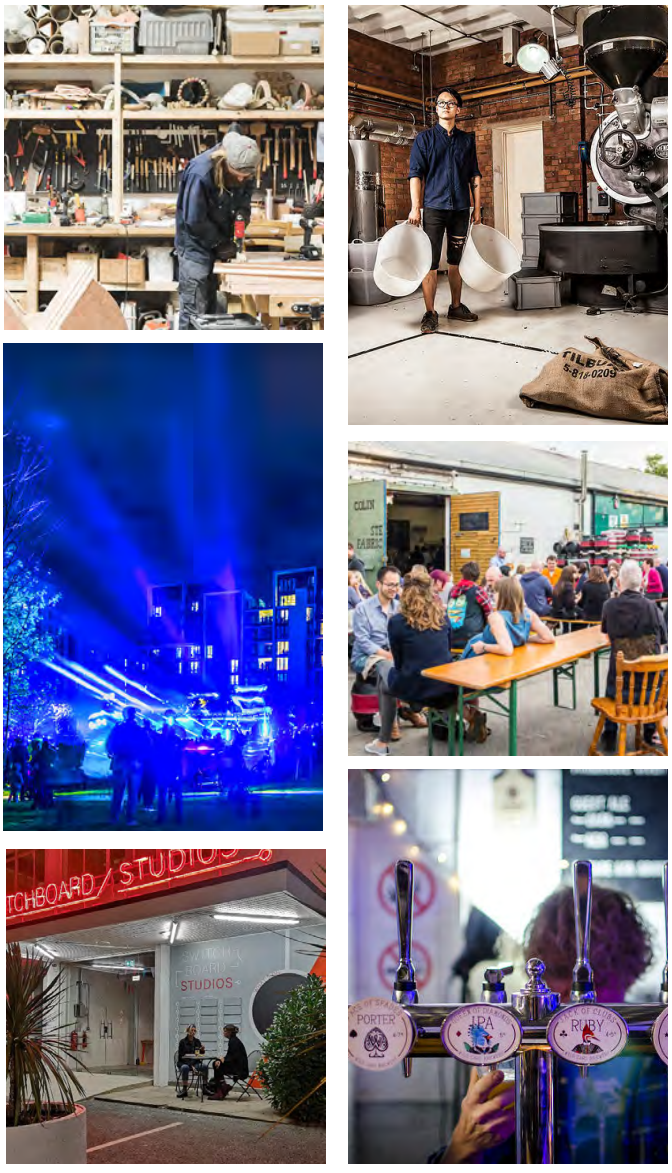


Figure 12 **Businesses at Blackhorse Lane SIL**

[4] Based on a desk-based observational audit

2.4 Industrial Supply and Demand

2.4.1 The need for land and space is driven by a number of factors:

- Macro-economic trends – we are now operating in the digital age where traditional manufacturing in the UK has been declining for the last 30 years. While this trend has also been evident in London, it is important to recognise that the manufacturing sector is becoming more diverse as evidenced by the growth of the 'Maker Mile' in East London[5]. Now London has more 'makerspaces' than any other part of the country, which support these types of businesses[6]. The evidence for London's Local Industrial Strategy recommends opportunities offered by R&D intensive sectors should be taken seriously and will lead to change[7]. Growth in online retail is leading to an increase in last mile requirements, with good road access along London's arterial routes.

- The operational characteristics of businesses – the shift in activities of London's businesses also gives rise to different workspace requirements. Policy E8 of the draft London Plan notes the *'evolution of London's diverse sectors should be supported, ensuring the availability of suitable workspaces including: start-up, incubation and accelerator space for micro, small and medium-sized enterprises; flexible workspace such as co-working space and serviced offices; conventional space for expanding businesses to grow or move on ; laboratory space and theatre, television and film studio capacity; and affordable workspace in defined circumstances'*.

- The commercial value of proximity to similar businesses, its supply chain and residents – there is a desire to be close to others operating in similar fields to benefit from the 'bump effect' of knowledge exchange and labour resource, as well as proximity to residents for footfall where businesses have a service-orientated offer.

2.4.2 Blackhorse Lane SIL has experienced a notable decrease (37%) in jobs since 2009[8]. A total of 1,190 jobs were lost from 2009 to 2018 according to national datasets[9]. While manufacturing as a whole has declined by 550 jobs, employment in the 'open workspace' sectors has increased by 57%.

2.4.3 Since the latest data release a number of businesses have moved to or opened up on the site including Switchboard Studios offering 26 co-working studios for over 80 people, Truman brewery, All Plants (vegan food manufacturers), Square Mile Roasters (coffee roastery) and Minor Figures (cold-brew coffee producers). Those taking up business space reflect the increasing diversity of London's economy and the growth in artisan manufacturing. This is similarly reflected in LBWF's designation of Blackhorse Lane as a 'Creative Enterprise Zone'.

2.4.4 The majority of lease transactions[10] and recent enquiries[11] have been for space below 1,000 sqm. The Industrial Land Audit conducted in 2019 (see Appendix) that the 7,000 sqm unit previously occupied by Warren Evans remains vacant. Since production of the Audit space in this unit has begun to be let in smaller sub-divisions to better reflect market demand. The quantum of available floorspace on the SIL has increased to its highest level since 2013, particularly reflecting the scale of the Warren Evans unit, suggesting space is less fit for purpose and orientated to the wrong market.

[5] http://makermile.cc/ Collective of 12 creative studios, mini factories and open workshops, which are dotted around Mare Street and bordering Tower Hamlets and Hackney.
[6] Nesta (2015) Open dataset of UK makerspaces
[7] GLA Economics (Aug 2019) Developing the evidence base for London's Local Industrial Strategy
[8] SIL geography defined as Waltham Forest LSOAs 014C and 014E.
[9] Business Register and Employment Survey, 2018
[10] CoStar
[11] Data provided by Blackrock for Uplands up to November 2019

2.5 Traditional industries and the creative sector

2.5.1 The role of East London[12] is a useful starting point in understanding the direction of travel for Blackhorse Lane SIL. Winning the bid to host the 2012 Olympic Games was a turning point for the eastern boroughs.

2.5.2 Since 2009 the number of jobs in East London has grown by 34% (266,000 additional employee jobs) compared to 25% growth across London as a whole.

2.5.3 East London has become a focus for companies which would typically occupy co-working spaces, incubators, accelerators, artists' studios and makerspaces (jointly termed 'open workspace' by the GLA[13]). These businesses tend to be micro (0-9 employees)[14] and in sectors such as publishing, programming and broadcasting, video production, creative and arts businesses. Over the last eight years micro business in the East of London operating in sectors which typically use open workspace have grown at a faster rate than the London average.

2.5.4 Whilst manufacturing employment as a whole has decreased in East London (-14%), employment in industries typically associated with more flexible and hybrid space such as 'open workspaces' have seen proportionate increases (c.80%) in both East London and Waltham Forest.

2.5.5 As a result of these changes (as well as the changes in supply and demand previously mentioned) Blackhorse Lane SIL now demonstrates an eclectic mix of business uses, particularly traditional manufacturing businesses which have evolved to include customer facing, service-orientated elements. This includes Signature Brewery, which hosts the Stow Film Lounge (pop-up cinema), Exhale Brewery, Wildcard Brewery and Yonder co-working space, climbing wall and yoga loft.

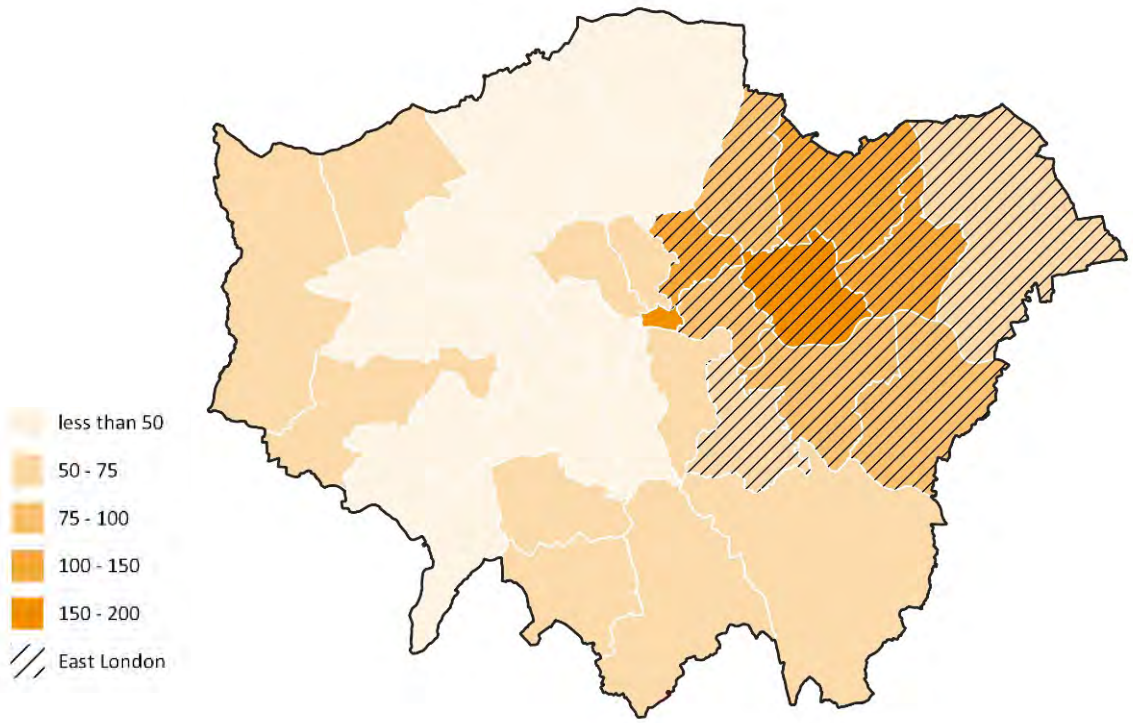


Figure 13 **Percentage change in number of micro businesses in open workspace sectors, 2010-2018, Source: UK Business Counts Data, 2019**

Figure 15 **Businesses at Blackhorse Lane SIL**

2.5.6 In this context, Blackhorse Lane SIL is well orientated to support LBWF in demonstrating the area's relevance to the GLAs Creative Enterprise Zone designations: *'areas of London where artists and creative businesses can find permanent affordable space to work; are supported to start-up and grow; and where local people are helped to learn creative sector skills and find new jobs'*[15].

2.5.7 To qualify as a Mayoral Creative Enterprise Zone, local authorities must demonstrate how they will provide the following.

- Space - permanent, affordable creative workspace and live-work spaces that are below market rents.
- Skills and business support - building entrepreneurial skills and offering business support to artists, start-ups, sole traders/freelancers and SME's and developing career pathways and opportunities for jobs within creative industries whilst also supporting local people from all backgrounds.
- Policy - local plans to incorporate pro-culture policies in planning, housing, business development, technology, super-fast broadband and infrastructure along with supportive business rate relief policies.
- Community and consortia – embed creative production in communities, creating socially-inclusive places and strengthening links with marginalised communities and education providers.

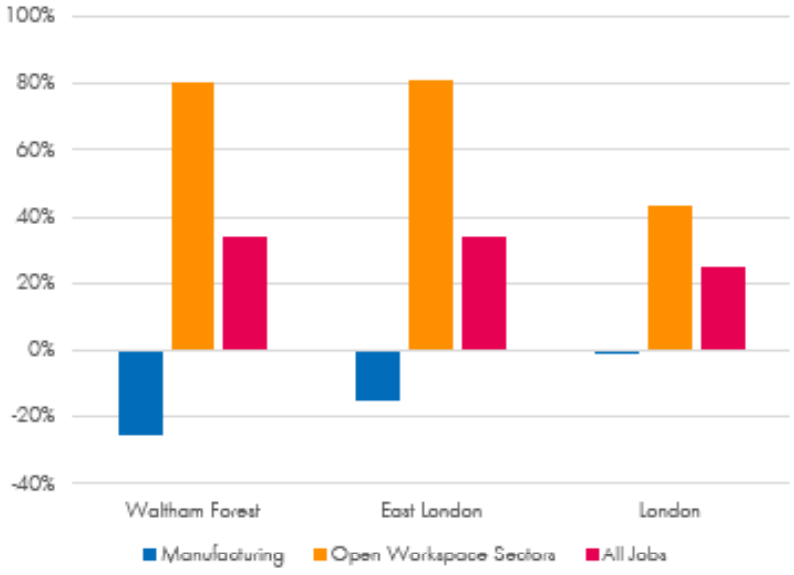


Figure 14 **Percentage change in employment by selected sector types, 2009 - 2018, Source: ONS via Nomis, BRES 2009-2018**

[12]London Plan sub region, which includes: East London includes: Barking and Dagenham, Bexley, Greenwich, Hackney, Havering, Lewisham, Newham, Redbridge, Tower Hamlets, Waltham Forest

[13]IPPR (2016) Start me up: The value of workspaces for small businesses, entrepreneurs and artists in London

[14]IPPR (2016) Start me up: The value of workspaces for small businesses, entrepreneurs and artists in London; verified through UK Business Count Data (2018)

[15] https://www.london.gov.uk/what-we-do/arts-and-culture/culture-and-good-growth/creative-enterprise-zones

2.6 Threats to growth

2.6.1 As shown in Chapter 1 and detailed earlier in Chapter 2, Blackhorse Lane has responded to changes in market demand by sector over time. This has led to organic growth and change. In recent years, this has resulted in traditional manufacturing occupiers diversifying to include a service orientated offer. Such uses both create and require a more vibrant setting which attracts both employees and customers.

2.6.2 In order for Blackhorse Lane to support continued organic business growth as well as to retain traditional industrial uses it needs to:

- Have flexibility in the size and use class of its business units to respond to market demand;
- Improve the quality of business units and surrounds to remain competitive with other locations;
- Support local footfall to the increasing number of companies on site who are diversifying to include service-orientated options;
- Improve access for pedestrians/cyclists to encourage a shift to more sustainable modes of transport;
- Upgrade infrastructure and digital connectivity to enable businesses to operate effectively within the modern economy;
- Enhance public realm and integration into wider neighbourhood to retain and attract staff who desire to work in a vibrant, creative, mixed use neighbourhood.

2.6.3 Without action Blackhorse Lane SIL will likely:

- Lose market share and see a continued decline in employment and businesses within its boundary;
- Support a lower level of Business Rates payments if its occupiers diminish;
- Fail to support LBWF aspirations for its Creative Enterprise Zone;
- Improvement would be likely to come forward as a building by building upgrade. The environment created in this instance bears comparison with the existing estate and would provide limited additional capacity. The low value of the development means it is unlikely to deliver improvements to the site or wider area, such as: improvements to the public realm; improvements to the efficiency of the site layout and street network; upgrades to infrastructure and digital connectivity; nor enable the reintegration of the area into the wider neighbourhood.

Figure 16 **Businesses at Blackhorse Lane SIL**

Figure 17 **Floorspace**

Figure 18 **Plot area ratio (PAR)**

Figure 19 **Buildings with upper storeys at Blackhorse Lane SIL (Uplands House, Eden Girls School and Switchboard Studios) are not capable of accommodating industry, and therefore have not been included in industrial floorspace.**

3 Existing Strategic Industrial Location and characteristics

3.1 Overall areas

3.1.1 An Industrial Audit was undertaken in June 2019 to develop a deeper understanding of the Blackhorse Lane SIL area, following GLA guidance (see Appendix). The bulk of the document provides a building-by-building, business-by-business catalogue of what is there at the moment, both in terms of the built fabric as well as the activity on site. This section presents an overview of the findings, which establishes areas for reprovision and underpins the strategy for intensification.

Industrial land and floorspace

3.1.2 The total area within the SIL boundary is 15.88ha.

3.1.3 The quantum of floorspace on site was determined through using OS mapping of the footprint of the buildings. The calculations are of Gross External Area (GEA) of the ground floor excluding mezzanine and upper storey floorspace:

- Gross External Area was used in line with the GLA's practice note, and because it minimises the number of assumptions taken given the data available.
- All buildings on site were included in the industrial floorspace calculations, regardless of the current use, with a view that floorspace could be used differently in the future. This is in line with the draft London Plan Policy E which seeks to retain industrial capacity.
- Mezzanines were excluded from the floorspace calculations in line with the GLA's practice note. More information on mezzanines can be found in section 3.2.
- Upper storeys were excluded from industrial floorspace calculations. There are very few multi-storey buildings on site. The three significant multistorey buildings - Uplands House, Eden Girls School and Switchboard Studios - are all of office block typology and none are industrial in use. The typology and floor-to-ceiling heights of the upper storeys on site make them unfit to accommodate industrial uses now or in the future. As such, upper stories can not be considered 'industrial capacity' as set out in the draft London Plan Policy E. More information on upper storeys can be found in section 3.2.

3.1.4 Based on this methodology, there is 76,054m² of industrial floorspace within the SIL area.

3.1.5 The schedule of areas of each building was compared against VOA data for validation. Unfortunately, this comparison was not effective given:

- VOA floorspace is Gross Internal Area (GIA) or Net Internal Area (NIA), whereas calculations for Blackhorse Lane SIL are GEA.
- VOA floorspace figures appear to include upper storey and mezzanines.

3.1.6 Given these differences in methodology, the two datasets were not directly comparable.

Plot area ratio

3.1.7 Plot Area Ratio (PAR) is a measure of density, considering the floorspace in relation to the size of the plot on which it is built (PAR = total floorspace / total plot area). In this case:

- Floorspace was calculated as set out in the preceding section. Total floorspace = 76,054m²
- Plot area was calculated by taking the total land area in the SIL (15.88ha) and subtracting the area of streets and pavements (as shown in Figure 16). Total plot area = 134,090m²

3.1.8 Based on this methodology, the PAR for the SIL area is 57%.

3.1.9 Plot Area Ratio gives an indication of how efficiently the land is being used. The London Plan considers 65% an appropriate Plot Area Ratio target for industrial land. Blackhorse Lane SIL is therefore slightly less dense, an indication that there is an opportunity to intensify the site. This could be achieved both through a more efficient lay out of the site, and adding upper storeys to the industrial buildings. It will be important that any intensification ensures the reprovision of productive and valuable outdoor space such as yardspace and amenity space, while also increasing the density and productivity of the site overall.

24,234m²
yardspace

21,079m²
parking area

Figure 20 **Parking areas**

Yardspace and parking

3.1.10 In line with the GLA's Industrial Intensification Study, yardspace is defined as the external space needed by an industrial occupier for their core business activities. This space can be covered or uncovered, and is often used for storage, production or processing activities which directly support a business' primary activity. This includes servicing and circulation space for vehicles which enable the movement of goods related to the core business activity.

3.1.11 For the purpose of this study, yardspace has been mapped as space within the site boundary which is not:

- building
- parking (staff & customer)
- green and other amenity space
- dead space (redundant/inaccessible)
- streets, footpaths and public realm

3.1.12 Parking areas have also been quantified, defined as customer parking and staff parking, and associated areas of hard standing. Parking areas cannot therefore be equated to spaces using standard measurements, because the areas include unusable and under used space.

3.1.13 Distinguishing between yardspace, parking and leftover spaces is not an exact science. Spaces can be used differently at different times of day and could be used differently by future tenants. Yardspace and parking mapping has been carried out through site visits and desk-based research, considering the existing layout, condition and use, concluding that there are 24,234m^2 of yardspace and 21,079m^2 of parking.

3.1.14 What is apparent is that whether parking or yardspace, buildings tend to have an apron of space outside their building which can be used flexibly for loading and deliveries, product display, parking, public seating, working or storage. This space is often used differently at different times of the day or week, as well as by different tenants. This small apron of space enables adaptability and flexibility to accommodate changing industry into the future.

Figure 21 **Townscape value**

- Positive
- Neutral - character reference
- Neutral
- Negative

Figure 22 **Building condition**

- Good
- Fair
- Poor

3.2 Built fabric

Townscape value

3.2.1 As part of the Industrial Audit, a building-by-building assessment has taken place through site visits and desk-based research. The assessment grades buildings in terms of their townscape value, considering the building's typology, history, materiality, appearance and relationship to surrounding spaces. Buildings were graded into four categories:

- *Negative:* the building detracts from the character of the area and quality of place
- *Neutral:* the building neither detracts from, nor benefits the character of the area and quality of place
- *Neutral, character reference:* at the moment, the building neither detracts from, nor benefits the character of the area and quality of place, but has hidden history or characteristics which could be reinterpreted through future building or public realm design. These buildings potentially have more value for meanwhile use.
- *Positive:* the building benefits the character of the area and quality of place.

3.2.2 Unlike many industrial areas which benefit from characterful historic assets, there are very few buildings of high townscape value on site, the only one being Uplands House. The site primarily consists of shed-like warehouses of varying condition and quality which are neutral or negative in terms of their contribution to the townscape. Many of the negative buildings on site have been deemed so because they fail to provide positive frontage onto key routes or a legible block structure.

3.2.3 There are a number of 1920s/30s warehouses on site, which have been altered beyond recognition or have not been maintained. The characteristics and history of these buildings could be used as references to inspire future design. These buildings could also be considered for meanwhile use.

Condition

3.2.4 Similarly, the building-by-building assessment considered the condition of the buildings. Buildings have been rated in three categories:

- *Poor:* the building and/or surrounding property needs improvement
- *Fair:* the building and/or surrounding property neither needs improvement, nor is it in good condition
- *Good:* the building has recently been refurbished and/or is fit-for-purpose

3.2.5 There are a number of properties which have been recently built or renovated and are in good condition. There seems to be some correlation between buildings which are in good condition, being of low townscape value, and vice versa meaning that form and function do not necessarily align.

3.2.6 While this analysis has been undertaken through site visits and desk based research, engagement with tenants and landowners, including site visits to the interior of the units will play an important role in furthering this understanding (see the Engagement Strategy in the appendix). In particular, it will be important to assess: how well the units meets the tenants' needs, efficiency and of use, flexibility to accommodate other uses; and ease of refurbishment, conversion or extension.

3.2.7 Townscape value and building condition are often considered when deciding whether there are suitable buildings to retain in redevelopment projects, as well as in considering phasing.

Figure 23 **Floor to ceiling heights allow for mezzanine**

Floor to ceiling height would allow for mezzanine

Floor to ceiling height would not allow for mezzanine

Figure 24 **Number of storeys**

One-storey

Two-storeys

Three-storeys

Mezzanines

3.2.8 The development of mezzanines can help to increase industrial capacity. The industrial audit, therefore, sought to understand the SIL's capacity to accommodate mezzanine. Through site visits, the following was assessed:

- Buildings with a 4m+ floor to ceiling height in some part were deemed able to accommodate mezzanine
- Buildings with less than a 4m floor to ceiling height were deemed unable to accommodate mezzanine

3.2.9 Based on this methodology, the buildings with capacity to accommodate mezzanine is shown in Figure 17. In order to maintain or increase industrial capacity, it is important that intensified industrial space maintains the flexibility to incorporate mezzanine through maintaining a substantial floor to ceiling height.

3.2.10 Unit surveys were not undertaken as part of the Industrial Audit, so the amount of existing mezzanine floorspace is unknown. A deeper understanding should be developed as part of the engagement with businesses (see the Engagement Strategy in the Appendix).. Furthermore, mezzanines were excluded from the floorspace calculations, in line with the GLA's practice note.

Number of storeys

3.2.11 Most of the buildings within the SIL are single storey. The few that do have additional storeys are largely clustered in the northern part of Uplands or form annexes to industrial warehouses. All buildings with upper storeys are 2-storey, with the exception of Eden Girls' School which has two 3-storey blocks. All buildings with upper storeys are of office typology.

3.2.12 The three significant multistorey buildings on site - Uplands House, Eden Girls School and Switchboard Studios - are all of office block typology and none are industrial in use. The typology and floor-to-ceiling heights of the upper storeys on site make them unfit to accommodate industrial uses now or in the future. Given this, upper storeys were excluded from industrial floorspace calculations because upper storeys do not provide 'industrial capacity' as set out in the draft London Plan Policy E.

194m²
of A3

804m²
of B1a

2,972m²
of B1c

21,171m²
of B2

21,619m²
of B8

1,681m²
of mixed B uses

1,283m²
of mixed B and D uses

3,729m²
of D1

1,333m²
of Siu Generis

1,911m²
Unknown

19,357m²
Vacant

Figure 25 **Current land use**

3.3 Land use and profile of tenants

3.3.1 As part of the Industrial Audit (June 2019), analysis was undertaken to understand the activity taking place within the Blackhorse Lane SIL. Planning use class and business sector data provide a level of understanding to this end.

3.3.2 In the case that development is taken forward, this understanding would be developed further through engagement with the businesses on site to understand their work, aspirations and needs.

Land use

3.3.3 For the purpose of completing the 2019 Audit, the planning use class of each of the premises was established through three data sets:

- *Valuation Office Agency (VOA) data*: Whilst the focus of the VOA is to value property and business assets for business rates, it provides information such as the main features and attributes of a property. Our objective was to better understand the type of employment clusters that are prevalent within the Blackhorse Lane SIL.

- *Planning history search:* In order to supplement the findings from the VOA data we assessed the premises against the planning history of the site available on the London Borough of Waltham Forest's Online Planning Register in June 2019.

- *Site visit:* a site visit was undertaken in June 2019 and supplemented by desk-based research to identify current use.

3.3.4 Industrial uses remain prevalent in the SIL, though the nature of this industry is changing in line with London and sector-wide trends. Recent additions to the site include: Signature brewery, All Plants (vegan food manufacturers), Square Mile Roasters (coffee roastery), Yonder (climbing wall and co-working space including maker space), Switchboard Studios (26 co-working studios for over 80 people) and Minor Figures (cold-brew coffee producers). Those taking up business space reflect the increasing diversity of London's economy and the growth in artisan manufacturing and sectors typically occupying open workspace.

3.3.5 There are also many other uses housed on site which are less typical of an industrial area, including a school, a college, a training centre, a police response station, a funeral parlour and offices. This diversity of uses suggests that the area does not operate as a typical SIL.

3.3.6 While there is little A3 (retail) in the SIL, many businesses do have ancillary retail functions.

3.3.7 Indeed whilst this section summarises the results of the latest Land Audit (June 2019) subsequently further new businesses have entered the site (including Signature Brew, All Plants, Exhale Brewery, Jump Bicycles and Isokon). These businesses and any other future occupiers will be included in the next iteration of the audit in 2020

Figure 26 **Permitted/lawful use**

21,748m²
manufacturing

21,371m²
wholesale

10,259m²
transport and storage

2,024m²
public administration & defence

4,300m²
education

1,467m²
motor trades

782m²
health

561m²
arts, entertainment, recreation & other

561m²
information & communication

461m²
professional, scientific & technical

194m²
retail

12,236m²
unknown

Figure 27 **Business sectors**

Business sector

3.3.8 Each property has been categorised by business sector based on the existing or previous use of the building identified as part of this Industrial Audit. A two tier categorisation has been undertaken using the Office for National Statistics (ONS) 'UK Business Counts – enterprise by industry and turnover size band' (from Nomis, 19 July 2019).

3.3.9 The first two tiers (digits) of the UK Business Counts Data has been used for this audit:

- Broad Industrial Groups. This includes the overall industries of the economy (e.g. Manufacturing, Retail, Education etc.)
- Digital Division – Further breakdown within Broad Industrial Groups to capture specialisms within industries (e.g. food or furniture manufacturing, retail/wholesale trade etc.)

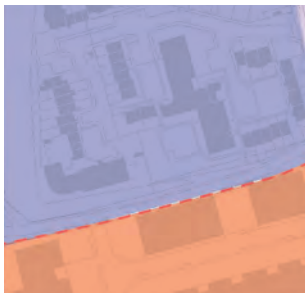
3.3.10 The mix of Broad Industrial Groups (BIG) which operate out of the Blackhorse Lane SIL are shown on the left. There is a broad diversity of sectors on site, with 11 different sectors active. These include sectors which are not contained in the GLA's list of SIL operational requirements (see 2.1.3), such as Education; Health; Professional, Scientific & Technical; Public Administration; and Arts, Entertainment, Recreation & Other'.

3.3.11 In terms of floorspace, small and medium scale manufacturing is the most prevalent business type. Over two thirds of space is occupied by businesses within either the Manufacturing, Wholesale or Transport and Storage industries.

Figure 28 **Character areas**

3.4 Character areas

3.4.1 The Blackhorse Lane area's character is diverse, contrasting and ever-changing. To assist our understanding, the area can be considered through character areas. The boundaries are not definitive but have been drawn up on the basis of predominant land use, ownership, building type and appearance, urban grain, streetscape and historical associations.

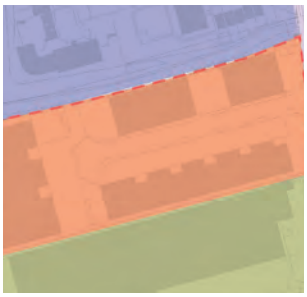


Existing homes - suburban terrace

A low density residential neighbourhood, with two storey terraced homes arranged in blocks of four. The houses are cottage-like in their proportions and more modest in detailing and materiality compared to the nearby Victorian/Edwardian streets.

The streets are laid out in radial geometric forms, creating quiet cul-de-sacs, as well as some awkwardly shaped blocks and leftover spaces.

This residential neighbourhood turns its back on the Blackhorse Lane SIL area and is separated by the footpath access to Walthamstow Wetlands.



Lockwood Way

A small estate for light industry comprised of single storey 1960s warehouses. The buildings are simple, brick sheds with corrugated metal panelling, flat roofs and roller shutters.

Buildings are arranged linearly along both sides of a dead-end access road. Most are smaller units with two larger buildings. There is no frontage onto Blackhorse Lane.

The public realm consists of an area of hardstanding between the street and building line which is used flexibly by different businesses including for parking, loading, product display, storage, public seating.

Figure 29 **Character areas (repeated)**

Delta Group

A more modern, planned provision of industrial space. The Delta Group area consists of linear rows of single-storey, double-height warehouses along both sides of an access route. The buildings are newer and in good condition compared to surrounding areas. They are metal-clad with areas of glazing. The street is wide with perpendicular parking and yardspace at the end.

The buildings are set back from Blackhorse Lane, separated by a fence line and at a different level, giving the sub-area a private and enclosed feel.

Uplands

Uplands is a business park for light industry, which is also home to a mix of other commercial and creative uses. For the most part, the site is made up of single-storey double-height warehouses. But buildings vary greatly in size, type, materiality and condition; a symptom of the fact that it has evolved gradually over time.

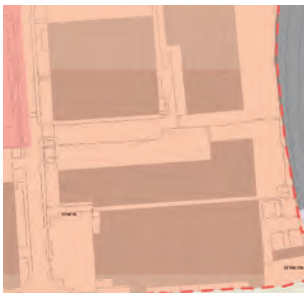
Notably, the large warehouses have been sub-divided into many smaller units. The result is a street pattern and grain which is not reflective of the activity on site. The public realm environment varies across the area, with unconventional access arrangements.

Eden Girls School

Eden Girls School is distinct, being a school surrounded by industry.

The school consists of three storey 1960/70s office blocks with a flat roof and repetitive windows along horizontal bands. The buildings are concrete, with pink, purple and blue panelling.

The school space is enclosed and gated, and does not address the street or surrounding area. It contains parking, lawns and sports areas. It generally feels removed from its context.



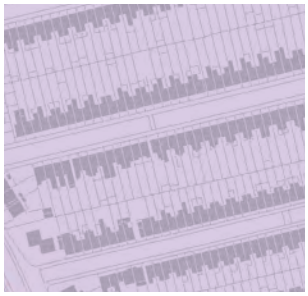
Forest Estate

An industrial area of double-height warehouses, some with two-storey office buildings attached.

Buildings are larger and sit loosely in space, often not facing on to the streets. Access arrangement are unconventional, and areas of private access make the area less permeable. Notably, there is a significant amount of planting, softening the feel of the public realm along Priestly Way.

The relationship to the area to the south is changing, as high density residential developments come forward. While the estate is generally inward looking, one row of buildings do provide frontage on to Blackhorse Lane, but are set back from the street.

Figure 30 **Character areas (repeated)**



Existing homes - terraced

Houses are tightly arranged in terraces along the residential streets with back gardens backing onto one another, creating a regular grid.

The area is mostly Victorian and Edwardian terraces, with some more recent additions which follow the same pattern. The street character is strong and coherent due to the consistency and rhythm of the architecture. Streets are generally dominated by on-street parking on both sides of the road.

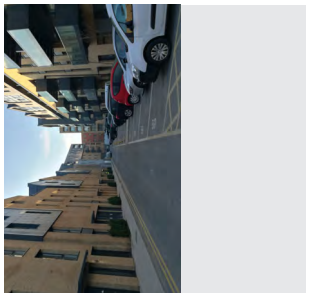
The area is primarily residential, though also has local amenities such as schools and parks, as well as shops along the south of Blackhorse Lane.

Suntherland Road

The modern urban typology (deep in plan, medium rise and delivers high density homes) has been incorporated as infill development between existing industrial and residential buildings.

Working within the constraints of the existing block structure and respecting neighbouring buildings has meant a more varied approach to the design of new homes. The buildings follow a less rigid rectilinear blocks and integrate houses and stacked maisonettes to provide more gentle transitions of scale.

The integration of different uses and building types make for animated and interesting streetscapes.

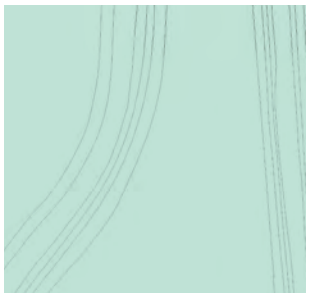


New high density housing

This area delivers high density homes as blocks of flats, which are deep in plan and medium rise. The character of the area is still evolving as it continues to be developed.

Perimeter blocks create simple streets and spaces which are generally well over-looked by balconies and streets have on-street parking. Though the animation and activity that multiple buildings and uses generate is lost. And there are parts of the ground floor which have an inactive/blank facade.

The area is primarily residential, with some shops at ground floor, nearer to the station.



Walthamstow Wetlands

The Walthamstow Wetlands are reservoirs for Thames Water which have recently been restored and opened as a nature reserve.

The landscape consists of large reservoirs, grasslands and footpaths, with some areas of tree cover. The area is relatively flat, with few obstructions, allowing for open, expansive views. The wetlands offer a break from the urban environment and act as a breathing space between Tottenham and Walthamstow.

At the moment, a fence line and levels restrict access and views from Blackhorse Lane SIL at ground level.

Figure 31 **Land ownership boundaries and lease lengths**

3.5 Land ownership

3.5.1 Intensification is likely to occur gradually along ownership lines, with soon-to-expire lease agreements freed up for earlier development.

3.5.2 To inform our understanding, the ownership titles and lease data for properties within the SIL area have been collated. Units have been categorized and mapped, according to length of time left on the lease or the time remaining until the lease break, whichever is sooner (as of July 2019).

3.5.3 Land ownership across the Blackhorse Lane SIL is fragmented, though there are a few significant areas of single ownership, which should inform sub-areas and phases for development. Notably, LB Waltham Forest own the northern parcel (Lockwood Way) and much of the centre of the site is owned by a single owner.

3.5.4 In terms of lease-length, most units have fewer than 10 years remaining on the lease, therefore the SIL has potential to come forward for development in the near future.

Figure 32 **Movement and access**

3.6 Movement, access and servicing

Site movement, servicing and access

3.6.1 The existing roads within the site include Priestly Way, Hookers Road, Lockwood Way and a number of unnamed internal roads. These are wide enough to accommodate articulated vehicles to service the industrial units. The existing radii on junctions onto Blackhorse Road are sufficient for the use of articulated vehicles, providing appropriate visibility splays for drivers. The nearest Strategic Road Network is the North Circular (A406) accessed via Blackhorse Lane to the north which is the predominant route for heavy goods vehicles. However this is 1.8 miles away which does not make it particularly appealing to logistics operators who favour immediate proximity to arterial routes. Furthermore, the immediately adjacent access roads are lined by Victorian terraced houses and therefore not ideal for high frequency HGV movements.

3.6.2 The north of the SIL (Lockwood Way, Delta Group, Eden Girls School and to some degree Uplands A) is arranged as discrete industrial estates, each with its own access route off of Blackhorse Lane. These tend to be simple T-shaped cul-de-sac of roads, providing direct access. Improvements could potentially be made by creating a north-south connection between these routes, creating a loop for safer and more efficient large vehicle access.

3.6.3 The street network in the south of the SIL is more complicated and convoluted. Priestly Way winds through the site, creating a number of pinch points and sub-optimal conditions for larger vehicles. Access is not intuitive. For example, Hookers Way connects to Blackhorse Lane and could provide direct access to the south of Forest Trading Estate but is gated, requiring drivers to enter the site from the north and travel south through the SIL. If the site were to be redeveloped, there is potential to improve vehicular access through establishing a more connected street pattern.

3.6.4 In terms of pedestrian access to the SIL, whilst footways are provided, they are considered to be below design standards. The existing pedestrian routes used to access Blackhorse Road underground station and the local bus routes on A503 Forest Road would be undertaken via Blackhorse Lane, or walking through the internal roads between the industrial units. Pedestrians are more likely to use the route on Blackhorse Lane where there is more formal and informal surveillance, particularly in the evenings.

3.6.5 The existing internal roads are not considered to be cycle friendly. There is no visible cycle parking provided on site and therefore employees and visitors would be more likely to use drive or use public transport when accessing the industrial units. There is an existing cycle route on Blackhorse Lane which connects into Waltham Forest's wider cycle network. This network has seen significant recent investment as part of the Mini-Holland Programme. Integrating basic cycle infrastructure on site would enable staff and customers to comfortably access the SIL via sustainable transport.

Parking

3.6.6 The SIL's on-street parking arrangements are informal, without restrictions and with cars using any areas of hardstanding as unmarked bays. The land surrounding the SIL is largely included within a Controlled Parking Zone (CPZ) restricting parking to permit holder. This may be resulting in more people using the SIL to park their vehicles.

Other transport infrastructure

3.6.7 The SIL does not benefit from any existing commercial water access (eg Wharfes), railway connectivity (eg rail heads) or other intermodal facility and is therefore wholly reliant on the road network.

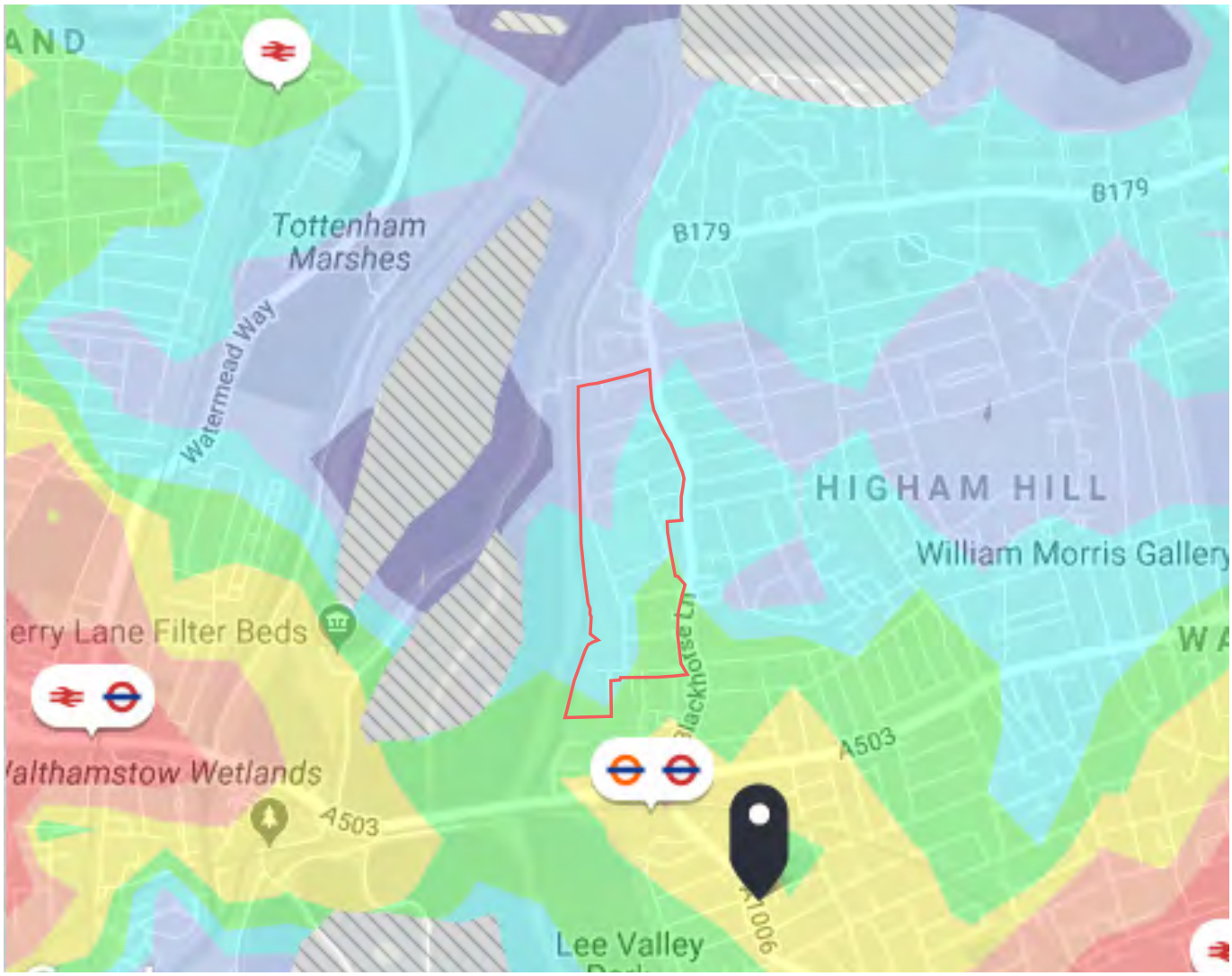


Figure 33 **Public transport accessibility levels**

Public Transport

3.6.8 Access to public transport varies across the SIL with central and southern parts well served by local bus routes and Blackhorse Road Station. The Public Transport Accessibility levels (PTAL) ranges from 3 in the south to 1b in the north as illustrated in Figure 25. This could improve through the introduction of a better street network.

3.6.9 The SIL is within approximately 5-15 minutes' walk from Blackhorse Road underground and overground stations which provides access to the Victoria and Overground Line with trains departing regularly during peak hours. The SIL is also a 20-30 minute walk from St James Street Overground Station which is further south on Blackhorse Lane. The SIL is within a short walk of eight bus services on Blackhorse Lane, providing regular bus services during peak hours.

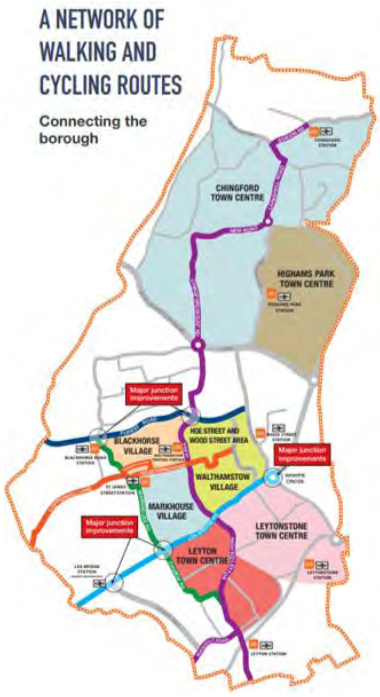


Figure 34 **Waltham Forest's cycling network**

Pedestrian and cycle accessibility

3.6.10 While the existing SIL provides limited pedestrian and cycling accessibility, the Blackhorse Lane area is served by well-established walking and cycling routes. In terms of local pedestrian accessibility, there is a well-established walking route along the River Lee Navigation running from Waltham Abbey to East India Dock.

3.6.11 In terms of local cycle accessibility, Quietway 2 runs to the south on Coppermill Lane and leads to Clerkenwell in central London, Cycle Superhighway 1 runs to the west along the A10 and leads into Shoreditch in central London.

3.6.12 The Waltham Forest Mini-Holland scheme is located within a few minutes cycle, which links into the sub-regional public transport network.

3.6.13 A map of the walking and cycling routes within Waltham Forest borough are illustrated in Figure 33.

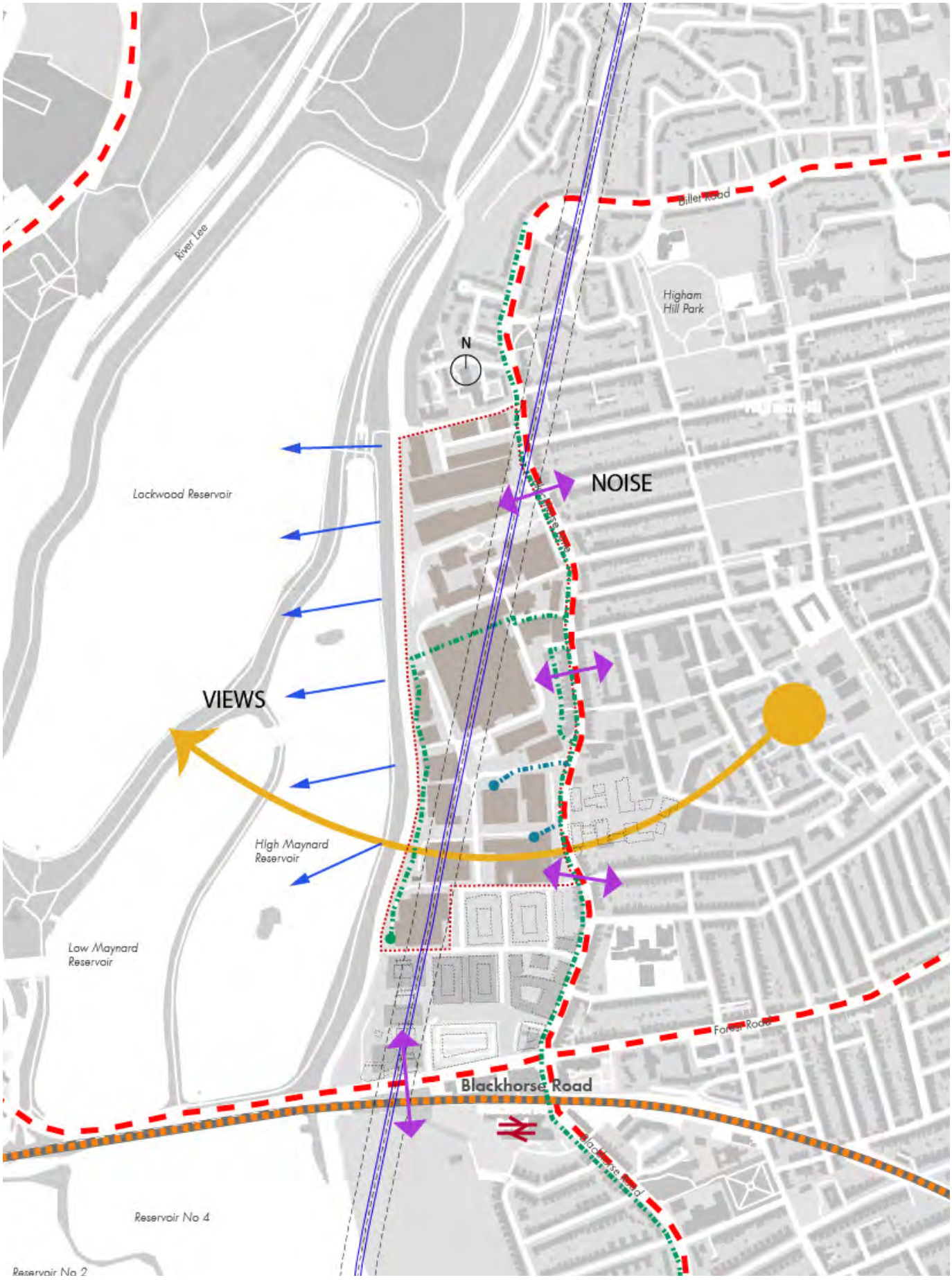


Figure 35 **Constraints mapping**

3.7 Key physical constraints

Utilities

3.7.1 Services are provided to the SIL via Blackhorse Lane. This includes gas, electricity, water and broadband. Whilst there may be some capacity within the existing network, onsite and offsite upgrades are likely to be required for any future development, particularly reflecting national policy supporting a move to electric vehicles and similar.

3.7.2 To the north of the SIL, on Blackhorse Lane, there is a high voltage electric supply, however the provision within the SIL is low voltage. Services within the SIL are mainly run beneath ground within the existing road infrastructure. Existing infrastructure includes a number of electrical substations, fire hydrants and the Thames Spine Tunnel.

3.7.3 The Thames Spine Tunnel is a high-pressure water main, which crosses the SIL heading from north to south with a diameter of 2,540mm. The Thames Spine Tunnel cannot be diverted as it forms part of London's strategic water network. No construction can take place within 15m of the outside wall of the tunnel and piling or foundations within this zone may be restricted (this will be subject to impact assessments). The Thames Spine Tunnel is a key physical constraint and future development will need to respond to this.

3.7.4 There is increasingly a requirement for high speed broadband connectivity to serve future development. Whilst the SIL is served by fibre optic, through a number of suppliers, upgrades are likely to be required for any future development.

Flood Risk

3.7.5 The majority of the SIL is located within Flood Zone 1, where the probability of fluvial and tidal flooding is classified as low. There are sections of the SIL along the River Lee Navigation which, based on the online Flood Map for Planning, are located within Flood Zone 2 (i.e. medium probability of fluvial flooding).

3.7.6 The Long Term Flood Risk Information flood map identifies some potential surface water flooding for the most extreme rainfall events; for future developments this should be managed via an appropriate surface water drainage strategy. Due to the location of the SIL mainly within Flood Zone 1 it is unlikely that flood risk would be a significant constraint to future redevelopment.

3.7.7 The highest flood level within the SIL for a 1 in 200 year event is 8.66m, therefore floor levels are recommended to be above 9.26m (allowing for 600mm freeboard). If floor levels are proposed to be below this level in any future development then these blocks should be located outside the existing flood risk areas. Alterations to the available flooded area may have an impact on downstream flood risk and some mitigation measures may be required if such alterations are proposed.

3.7.8 There are several sewers and one culverted watercourse which cross the SIL. These are subject to easements from Thames Water and the EA. Thames Water are likely to require at least a 3m easement from assets and 8m from the culverted watercourse.

4 Stage 1: options

4.1 An evidence-led approach to Blackhorse Lane SIL

4.1.1 Proposals for Blackhorse Lane SIL should respond to the site's specific context and be firmly rooted in the evidence and analysis set out in the previous three sections, addressing the SIL's issues and harnessing its opportunities. They will also need to be informed by engagement with local businesses and key stakeholders.

4.1.2 The evidence suggests that to achieve industrial intensification and economic growth part or all of the SIL would benefit from wholesale redevelopment through a coordinated masterplanning process to create a modern industrial neighbourhood, given the following factors:

- Existing building stock does not meet demand. The SIL's large warehouses have become difficult to let and been subdivided into much smaller units. The majority of lease transactions and recent enquiries have been for space below 1,000sqm. The quantum of available floorspace on the SIL has increased to its highest level since 2013. This is reflective of the changing nature of industry in the area, and the building stock being oriented to the wrong market. Purpose-built units can better provide for existing businesses, while designing in flexibility in the size of unit and use class to respond to market demand (section 1.3 and 2.4).
- The SIL has a high proportion of service-oriented businesses, compared to other SILs in London. These businesses would benefit from improvement to the public realm and legibility as well as better integration with the surrounding neighbourhoods, to support local footfall (section 2.3).
- Existing buildings are in poor condition and offer little by the way of townscape or heritage. Furthermore, the majority are single storey, which suggests redevelopment could increase density and make better use of the land, for example industrial intensification through stacked industrial units (section 3.2 and 4.4).
- There has been a shift toward more creative and artisan industry at Blackhorse Lane SIL, creating jobs and shaping a USP for the area. There is an opportunity to foster this growth by improving the quality of the business units and surrounds to remain competitive with other locations, and for investment into placemaking to perpetuate the 'bump effect'. This would also support LBWF's ambitions for Blackhorse Lane to become a Creative Enterprise Zone by increasing the amount of creative workspace and fostering education opportunities (sections 2.3 and 3.3)
- Wholesale redevelopment could help to upgrade digital connectivity to enable businesses to operate effectively within the modern economy (section 2.6).
- There is demand for new homes in the area and the existing uses would be largely compatible with residential if designed well. (In contrast to the majority of SILs, Blackhorse Lane does not serve a utilities function and has no heavy industry on-site making it distinct from the 43 SILs which do.) The SIL is within an Opportunity Area and has a relatively high PTAL rating. Incorporating homes on to the site could incentivise investment and provide cross-subsidisation towards building high quality, modern industrial space in innovative typologies (section 2.3 and 1.5).
- The street layout within the SIL is sub-optimal. Redevelopment of the site would allow for improvements to be made in terms of efficiency, while also improving access for larger vehicles which are needed to service industrial businesses (section 3.6).

- The opening of the Walthamstow Wetlands presents an opportunity to create leisure access and establish views to the Wetlands which would provide a particular USP as a place to work (section 1.4).

- Without wholesale redevelopment, improvement would be likely to come forward as a building by building upgrade. The environment created would bear comparison with the existing SIL and would provide limited additional capacity. The low value of the development means it is unlikely to deliver improvements to the site or wider area (section 2.6).

4.1.3 Given the case for redevelopment of the SIL, a process is being undertaken to evaluate options, following the GLA Practice Note and draft London Plan Policy E7: *"Development Plans and planning frameworks should be proactive and consider, in collaboration with the Mayor, whether certain logistics, industrial and related functions in selected parts of SILs could be intensified. Intensification should facilitate the consolidation of the identified SIL to support the delivery of residential and other uses, such as social infrastructure, or to contribute to town centre renewal."* This document represents Stage 1 of this process and will conclude with:

- Section 4.2 sets out criteria for determining appropriate locations for intensification

- Section 4.3 evaluates a series of options based on this criteria and concludes with a preferred approach to intensification at Blackhorse Lane SIL

- Section 5 proposes a sub-area strategy for Stage 2 and the redevelopment of the SIL.

4.2 Criteria for intensification

4.2.1 The Blackhorse Lane SIL has a reasonable plot area ratio (57%), with all sites demonstrating high utilisation/coverage of land. There are no significant opportunities for infill development. Given this, intensification is likely to be achievable through two means: (1) by making the site layout more efficient, with superfluous roads and hardstanding designed out (2) by using different building typologies including stacked industrial units to increase industrial floorspace (possible typologies are explored in section 4.4).

4.2.2 In order to determine which parts of the site might be best placed for intensification, a set of criteria has been considered, emerging from the analysis set out in the previous sections.

4.2.3 These criteria include:

- Exclusion zone
- Vehicular access
- Boundary conditions and sensitivity
- Business and landowner intentions
- Existing density
- Ownership consolidation
- Condition and merit of existing stock
- Deliverability

4.2.4 Each of these criterion is outlined on the following pages with a 'heatmap' suggesting the most to least appropriate location for industrial intensification based on that criterion. The criteria are then considered collectively in 4.2 to build a picture of where industrial intensification might be possible.

4.2.5 Industrial only redevelopment is unlikely to warrant a wholesale redevelopment, due the costs associated. This means that an industrial only option would be likely to come forward as a building by building upgrade. Therefore the environment created by this option bears comparison with the existing estate and would provide limited additional capacity. The low value of the development means it is unlikely to deliver improvements to the site or wider area. So whilst areas for industrial intensification are identified, to facilitate development, it is likely to require the introduction of other uses alongside.

Figure 36 **Plot area ratio**

Exclusion zone

4.2.6 One of the main constraints to development at Blackhorse Lane SIL is the Thames Spine Tunnel, a high-pressure water main which crosses the SIL heading from north to south with a diameter of 2,540mm. The Thames Spine Tunnel cannot be diverted as it forms part of London's strategic water network. No construction can take place within 15m of the outside wall of the tunnel and piling or foundations within this zone may be restricted.

4.2.7 Given this exclusion zone, it will be much more difficult to achieve industrial intensification on the sites effected.

Nothing can be built within 15m of the outside wall of the Spine Tunnel, making intensification more difficult to achieve around this area.

Key

indicative exclusion zone - more difficult to achieve intensification

Vehicular access

4.2.8 Vehicular access for servicing and deliveries is an important function of industrial businesses. Therefore industrial intensification would be best situated where vehicular access is best.

4.2.9 Although the SIL is not advantageously connected for logistics occupiers, with the North Circular (A406) being 1.8 miles away, and the immediate roads being small scale residential with Victorian terraces, when considering the areas of the SIL which are best connected these lie to the north and east of the site due to connectivity via Blackhorse Lane. The nearest strategic road network is the A406 accessed via Blackhorse Lane to the north which is the predominant route for heavy goods vehicles. For more local journeys, less suitable for frequent or heavy freight, A503 Forest Road to the south provides access to east to Walthamstow, and west to Tottenham Hale and subsequently the A10 which runs north to the M25.

Vehicular access is generally better to north the of site, with quicker access to the North Circular, the nearest arterial route.

Generally, the vehicular access is better on the eastern side of the site, with more direct access to Blackhorse Lane.

Local residential streets less suitable for frequent or freight movements.

Key

less accessible — more accessible

Boundary conditions and sensitivities

4.2.10 One of the key criteria for developing an intensified industrial offer is the level of sensitivity of the SIL's neighbours on each side. This takes into consideration:

- use (residential being more sensitive than other uses)
- buffer/space between buildings (more space/buffer being less sensitive)
- existing noise and activity (noisy/busy areas being less sensitive than quiet ones)
- ecological sensitivity

4.2.11 Generally it is preferable to have industrial intensification in areas of lower sensitivity. Though there are of course mitigation measures which can be taken in the design and in terms of selecting the right tenants for each space which can help to minimise the impacts for intensification on neighbouring properties.

The neighbours on the northern and eastern edges of the SIL are likely to be of moderate sensitivity towards industrial intensification. Both are low rise residential uses. However the northern edge has a green buffer between the homes and the SIL (the footpath entrance to the Wetlands). On the eastern edge Blackhorse Lane provides a level of existing noise and activity which sets the character for the street.

Walthamstow Wetlands is part of the Lee Valley Special Protection Area and therefore likely to be of some sensitivity towards industrial intensification. As part of a masterplanning process, consultation would be required with relevant stakeholders and action taken to mitigate impacts.

The stretch of homes which back on to the SIL are likely to be more sensitive to industrial intensification given they lack a buffer.

There is a new residential development adjacent to this frontage. Though Blackhorse Lane provides a level of existing noise and activity which sets the character for the street.

To the south is a high density residential development. Given the lack of buffer and level of exposure to the SIL with flats overlooking, this area is likely to be more sensitive to industrial intensification.

Key

more sensitive — less sensitive

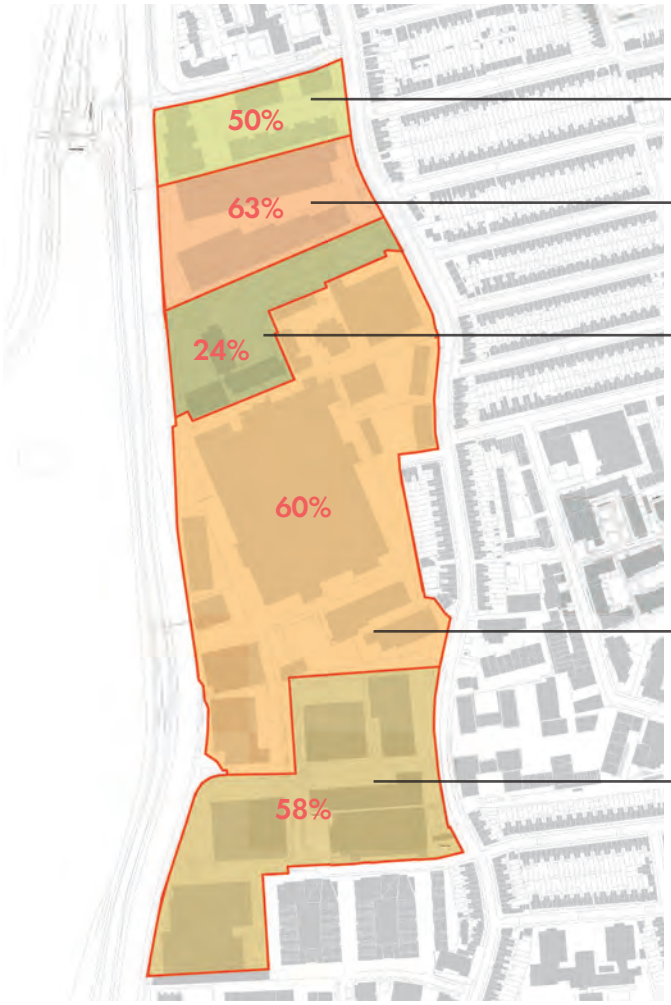
Existing density

4.2.12 Industrial intensification seeks to increase the density in an area, in terms of built form/capacity and economic activity. A low existing density is more capable of accommodating an increase, making this a relevant criteria for intensification.

4.2.13 Plot area ratio (PAR) is a measure of density and has been considered for each of the character areas. The methodology for calculating PAR is set out in section 3.1.

4.2.14 The PAR for each of the character areas and for the SIL overall are below the London Plan's default 65% PAR for industrial land. This would seem to indicate that the entire SIL would be appropriate for industrial intensification, though intensification would likely require a change in typology. It will be important that any intensification ensures the reprovision of productive and valuable outdoor space (which PAR does not account for) such as yardspace.

4.2.15 There are other indicators of density which can help to provide a more nuanced understanding, including efficiency of use of units, job density etc. These will be explored as part of the business/landowner engagement.



Lockwood Way is of lower density than the SIL average, and therefore more appropriate for industrial intensification.

Delta Group is the highest density character area within the SIL, though is still below the GLA's standard 65% plot area ratio for industrial land.

Eden Girls School is the lowest density character area within the SIL. However, industrial intensification would likely necessitate a change in use, which may not align with landowner intentions or social infrastructure requirements of the local area.

Uplands character area has the second highest density on site although does present potential opportunity for limited intensification

Forest Estate is of a medium density in relation to the rest of the SIL also offering potential scope for limited intensification.

Key

higher density — lower density

Business and landowner intentions

4.2.16 The appropriate location for intensification should be determined and designed to respond to the needs and aspirations of the businesses and landowners. Engagement with the tenants and landowners, therefore, is a critical next step in the masterplanning process. An Engagement Strategy is set out in the Appendix.

4.2.17 As this engagement has not yet taken place, length of tenancy can give some indication of the areas which are more readily available for redevelopment.

Buildings within Lockwood Way have a mix of tenancy arrangements and lengths of lease remaining.

Buildings within Delta Group have significant time remaining under the lease.

Buildings within Uplands are more readily available for redevelopment based on lease expiry/break clauses.

Buildings within Forest Estate are predominantly under freehold.

Lease expiry/break

- expired
- 0-3 years
- 4-5 years
- 6-10 years
- 10+ years
- Freehold

Ownership consolidation

4.2.18 Due to multiple ownerships (as shown in section 3.5) Blackhorse Lane SIL will not be brought forward as a single site, but will instead develop through a process involving multiple landowners.

4.2.19 Intensification should take place in an area where there can be a complete first phase of development to rehouse existing businesses in a single decant and unlock the rest of the site. Because of this, areas of fragmented land ownership are less likely to be able to forward a phase of industrial intensification, while areas of consolidated land ownership are more appropriate for intensification.

Three parcels in the north of the SIL - Lockwood Way, Delta Group and Eden Girls School - each represent a significant land holding and have their own access route, which could support intensification.

The largest area of consolidated land ownership is in the centre of the site, indicating it would be appropriate for intensification.

The south east of the site is in fragmented ownership, making it more complicated and less appropriate for intensification.

The south west part of the site is reasonably consolidated.

Key

less consolidated — more consolidated

Condition and merit of existing stock

4.2.20 The condition of the building stock and any heritage or townscape merit are a consideration when evaluating the most appropriate locations for redevelopment and therefore intensification.

4.2.21 Townscape merit and building condition were assessed as part of the industrial audit (summarised in section 3.2). Generally, the building stock is in poor condition and offers very little by way of townscape merit. It is unlikely that many buildings would be retained as part of a redevelopment.

4.2.22 It is reasonable to suggest that buildings in poor condition might be redeveloped first, while those in good condition and of higher townscape merit might be left to later stages. Intensification should take place as a first phase of development to rehouse existing businesses in a single decant and unlock the rest of the site. Therefore areas of poorer building stock are more appropriate locations for intensification.

Lockwood Way and Delta Group are of neutral townscape merit, however Lockwood buildings are in poorer condition making them somewhat more appropriate for intensification.

There is a group of buildings in poor condition in Uplands A suggesting this could be an appropriate location for intensification.

Uplands House is the only buildings within the SIL which is in good condition and offers townscape value. This should be considered for retention or for a later phase of development.

Buiding in Forest Estate are neutral to negative in terms of townscape value, and neutral to poor in terms of building condition, suggesting it is an appropriate location for intensification.

Key

better stock

poorer stock

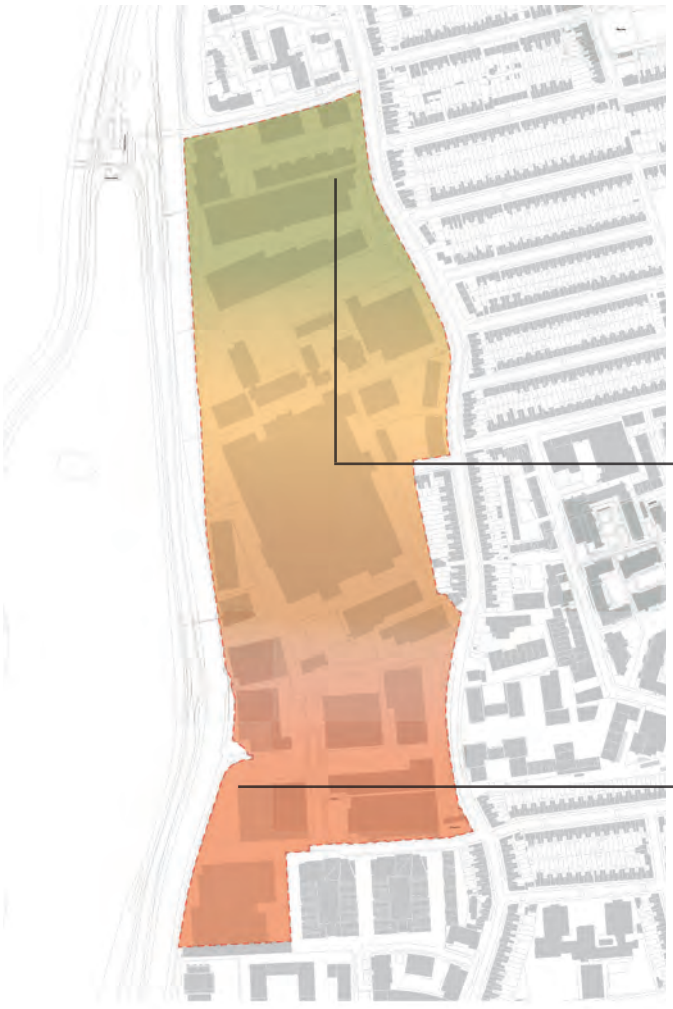
Deliverability

4.2.23 Cost is a key consideration in any redevelopment project. Deliverability is a major factor in whether proposals will be brought forward and will ultimately be delivered while operational costs can also have a bearing on the future ability to lease a space:

- Investment in building modern, fit-for-purpose industrial space, particularly stacked industrial units which command a higher cost base, needs to be weighed up against the current or potential lease value in the absence of redevelopment.
- Occupier costs may be higher during operation if a businesses has to introduce operational considerations as a result of being above ground floor level or occupying a shared building. This can include movement of goods within a building, shared spaces with other tenants or potential increases to insurance premiums as a result of shared access'.

4.2.24 Land values provide a proxy for those areas which would be exposed to greater (higher land value) or smaller (lower land value) levels of risk associated with development and operational cost. Redevelopment of areas of lower land value for industrial intensification would be better able to accommodate the cost considerations set out above.

4.2.25 Areas of higher land value can support redevelopment and have a greater ability to accommodate higher value uses. Introduction of such uses will also assist in off-setting costs of redevelopment on lower land value parcels and therefore contribute to the deliverability of a redevelopment proposal



Generally speaking, land values are lower in the north being further from Blackhorse Road Station, making industrial intensification more deliverable.

Land values are higher in the south due to proximity to Blackhorse Road Station and the new residential redevelopment, making industrial intensification less deliverable.

Key

less deliverable — more deliverable

Conclusion

4.2.26 Section 4.1 set out the detailed criteria for assessing industrial intensification across the SIL. Based on this assessment the following is evident:

- Exclusion zone: There is a pipeline from the south, to the north east of the SIL, above which development is not possible, making these sites less appropriate for intensification.
- Vehicular Access: It is evident that the eastern half the SIL offers the greater vehicular connectivity, and the north is somewhat better served by the Strategic Road Network than the south being nearer to the North Circular.
- Boundary conditions and sensitivities: The boundary to the south and the terraced housing backing on to the SIL in the south east are most sensitive to industrial intensification.
- Existing Density: The whole SIL falls below the 65% PAR and thus offers potential for intensification however character areas to the north (Lockwood and Eden Girls School) have lower densities and thus the greatest potential. This understanding will be furthered through engagement with businesses, to consider other indicators of density.
- Business and landowner intentions: The most appropriate location for intensification will be subject to review following engagement with businesses and landowners.
- Ownership consolidation: The north (Lockwood, Delta and Eden Grils School), the central area and far south western corner all benefit from consolidated land ownership, making thses areas more suited to delivering intensification.
- Condition and merit of existing stock: The building stock is in poor condition and offers very little by way of townscape merit, suggesting most of the SIL is appropriate for intensification. There is a group of buildings in poor condition in Uplands A suggesting this could be an appropriate location for early redevelopment and industrial intensification.
- Deliverability: The northern part of the SIL presents lower land values and therefore greater propensity to support development and operation of intensified industrial uses, these being more cost sensitive. The higher land values to the south allow for integration of other uses which would also create cross-subsidisation benefits for other areas of the SIL

4.2.27 Section 4.2 sets out three options for intensification based on these findings.

4.3 Options for intensification

4.3.1 Based on the initial approach and criteria set out in sections 4.1 and 4.2, this section of the document evaluates areas within the SIL considering their suitability for intensification. The character areas have been used, grouping the top three smaller areas into one. Given the scale of the SIL and its characteristics, these options were seen as a pragmatic approach to capture the variation in conditions across the area:

- Option A: Lockwood/Delta/Eden Girls School
- Option B: Uplands
- Option C: Forest Estate

less appropriate for intensification

more appropriate for intensification

Option A: Lockwood/Delta/Eden Girls School

4.3.2 The first area and the most northerly in the SIL consists of three character areas - Lockwood Way, Delta Group and Eden Girls School. Each of the three parcels is inward looking with its own access road and is bordered to the to the east by Blackhorse Lane and to the west by the Wetlands. Lockwood and Delta group are both industrial whereas Eden Girls School is, as the name suggests, a school.

4.3.3 Intensification in the northern part of the SIL (Option A) would be supported by good vehicular access, is less affected by the exclusion zone than other options, presents the most deliverable option in terms of land values and avoids the most sensitive neighbours. Ownership is consolidated into three parcels, which could facilitate intensification. Building stock is not a significant indicator in this instance; the area neither has the best nor the worst stock and none of the buildings are of high townscape value. The existing density is slightly lower than the rest of the SIL at Lockwood and Eden Girls School. While Delta is higher, it remains under the GLA's 65% default plot ratio and could be intensified if stacked typologies were used (see Appendix).

4.3.4 In terms of business and landowner intentions, this criteria will be subject to review following engagement with stakeholders (see the Engagement Strategy in the Appendix). It is noted that the school is social infrastructure that may continue to be required in the area and has relatively recently seen investment in the improvement of its estates, and so is unlikely to be significantly altered or to relocate within the timescales for change that this document envisages for the wider area.

4.3.5 Based on this evaluation, Option A is suitable for industrial intensification, with the exception of the School site which is assumed to remain in situ until further engagement..


Exclusion zone


Vehicular access


Boundary sensitivities


Existing density


Business/landowner intentions


Ownership consolidation


Building stock


Deliverability

Option B: Uplands

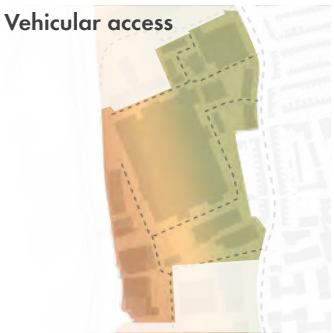
4.3.6 Uplands is in the centre of the SIL and is characterised by a range of buildings, from smaller industrial units through to very large footprint buildings, which do not address the streets. Over recent years as former businesses have vacated these larger buildings have become increasingly unsuited to modern requirements in this location and so represent a significant opportunity for change. There are three access roads which enter the SIL at Uplands; the furthest north is a simple T access road while the other two are less typical.

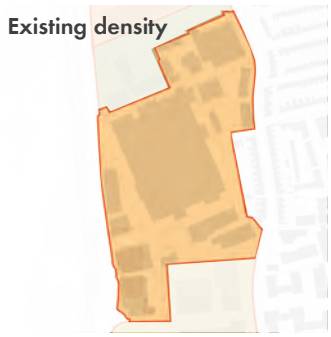
4.3.7 The criteria give a mixed picture about the suitability of Uplands for industrial intensification. Intensification would be supported by good vehicular access (better in the north and east), a large area of consolidated ownership, and availability in term of lease length.

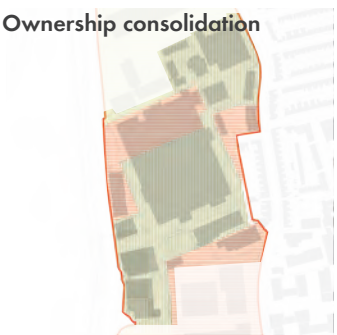
4.3.8 On the other hand, the exclusion zone crosses much of Uplands posing a challenge towards intensification and the density is high in relation to the rest of the SIL (though still below the GLA's 65% default plot ratio), suggesting stacked typologies would need to be used to achieve an uplift (see Appendix). The area is less deliverable in terms of land values, particularly in the south. And there is row of terraced homes backing directly on to the SIL along the south east border of Uplands which would be sensitive to intensification.

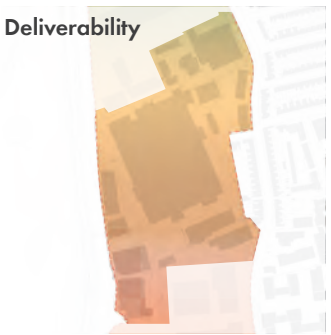
4.3.9 The building stock within Uplands is varied. It is home to the only building in good condition with townscape merit which could be considered for retention or a later phase of development. However, these buildings sit alongside a cluster of buildings in poor condition, which could offer for a first phase of intensification.

4.3.10 Whilst the criteria give a more mixed picture than in Option A, the evaluation suggests that the north east of Option B is suitable for industrial intensification, whereas the south and west would be less appropriate.









less appropriate for intensification

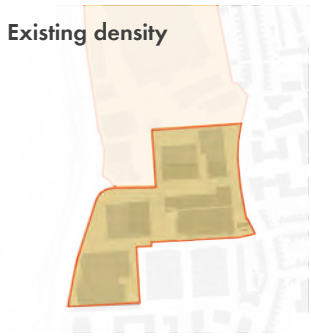
more appropriate for intensification

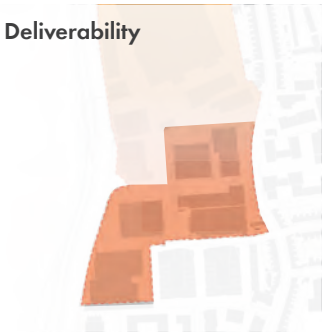
Option C: Forest Estate

4.3.11 Forest Estate is the most southerly in the SIL. Like the others it is bordered by Blackhorse Lane to the east and Walthamstow Wetlands to the west. Unlike the others, it neighbours a new high density residential neighbourhood and Blackhorse Lane's neighbourhood centre to the south. The area is characterised by large footprint buildings which do not address the streets. The access arrangements are slightly unconventional with Hookers Road being gated and the south westerly buildings being accessed by Priestly Way to the north.

4.3.12 Industrial intensification in Forest Estate would be made difficult by the area of consolidated land ownership being severely effected by the exclusion zone which restricts development. Furthermore, the southern boundary is the most sensitive with neighbours overlooking and no buffer, the area has the poorest vehicular access and is the least deliverable in terms of land values. While existing density is relatively low and the building stock is not consequential, other factors would indicate that Forest Estate (Option C) is the least appropriate location for industrial intensification.

4.3.13 In terms of business and landowner intentions, this criteria will be subject to review following engagement with stakeholders, but it is worth noting that there are a number of freeholder occupants.





Evaluating the options for intensification

4.3.14 Assessment of the options against the criteria demostrates that Option A is the most suitable area for industrial intensification, given it is supported by the best vehicular access, is least effected by the exclusion zone, is the most deliverable in terms of land values and avoids the most sensitive boundaries. Furthermore, three significant parcels of consolidated ownership provide an uncomplicated arrangement from which to bring about change.

4.3.15 Within Option A the school presents a unique context being social infrastructure which is likely to continue to be required. Given this, the school site has been discounted from the area deemed appropriate for industrial intensification until further engagement takes place regarding the future of the school.

4.3.16 Intensification is more appropriate in the north of Option B than the south, given the north offers better vehicular access, is more deliverable in terms of land values, avoids sensitive boundary along the south eastern edge and has a cluster of buildings in poor condition which could offer a first phase of intensification.

4.3.17 Option C and the south of Option B are less appropriate for intensification given they have the poorest vehicular access, are less deliverable in terms of land values and have the most sensitive neighbours. Furthermore Option C's parcel of consolidation ownership is effected by the exclusion zone, making intensification more difficult to deliver.

4.3.18 This assessment points to a broad strategy of intensification and consolidation being focused in the north.

Preferred approach

4.3.19 Application of the criteria set out in section 4.2, the northern area of the SIL area (Areas A and B) has been identified as the most appropriate location for industrial intensification.

4.3.20 In terms of business and landowner intentions, the picture is still evolving. The most appropriate location for intensification will be subject to review following engagement with stakeholders (see the engagement strategy in the appendix). This will allow an approach to the SIL's intensification to respond to the needs and aspirations of landowners and businesses.

Considering areas for non-intensification

4.3.21 Inversely Figure 38 shows the area which presents the best option for the integration of other uses. Integrating higher value uses (while retaining existing businesses and supporting LBWF's Creative Enterprise Zone ambitions) can help offset the costs of intensification as well as helping in urban design terms to create a cohesive place, responding to the threats to organic growth identified in section 2.6. The southern part of the SIL is more appropriate for the introduction of other uses, given its higher PTAL rating, the neighbourhood centre forming to the south on Blackhorse Lane, and reflecting the higher density residential development to the south.

4.3.22 These have not been drawn as distinct areas. Upon completion, the redevelopment of the SIL should not feel like two zones, but one cohesive place. This is particularly important when considering the character and function of the streetsccape. The overlap therefore represents a seemless transition in character and uses, from a more mixed-use creative industrial neighbourhood to the south, towards an intensified industrial area in the north.

Figure 37 **Area most appropriate for intensification**

Figure 38 **Area more appropriate for integration of other uses**

4.4 Building typology options

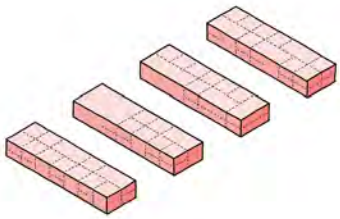
4.3.23 A series of building typology options have been developed in order to understand the intensification potential and to assess the pros and cons of the possible built forms for Blackhorse Lane SIL.

4.3.24 Each option represents an individual or blended building typology. In order to understand the development capacity of each typology, a sample site from within the SIL area has been modelled based on the assumptions given for each typology and the physical constraints of the site, in order to reach a per hectare indicative density. It is worth noting, that while each typology has been considered on a SIL-wide basis for ease of comparison, no single typology would be suitable for repetition across the entirety of the SIL area. Furthermore, densities will vary given site specific constraints, meaning they should not be applied on a site-wide basis.

4.3.25 Each option has been initially considered on its merits in terms of placemaking, development capacity, phasing, viability, policy ambition and accessibility. These typologies will be developed further in Stage 2 and through the engagement process.

4.3.26 For each option, the colours refer to:

- industrial
- residential
- other space (retail, commercial or community space)



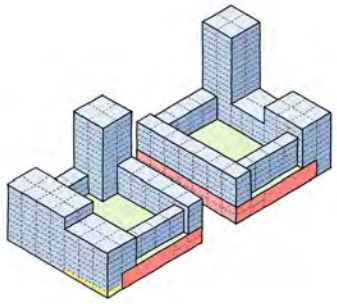
Industrial only - single storey, small units

Rows of small industrial units with vehicular access and yardspace are suitable for accommodating the businesses which are presently found at Blackhorse Lane SIL and evidence suggests there is growing demand for smaller units and workshops. There could be designed as modules which can be combined to create larger units. While the GLA's target for this type of development is a 65% plot ratio, with the exclusion zones and other physical constraints on the site, the floorspace delivered would be comparable to the existing floorspace.

Indicative density

Industrial floorspace	4,000 - 5,000m²/ha
Residential floorspace	0m2
Other floorspace	0m2

Assumptions: Retaining the existing floor area ratio, and improving the quality of the buildings over time.



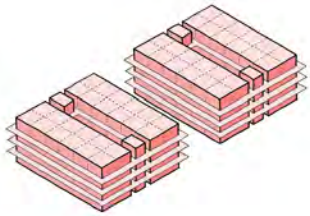
Industrial development layered with residential above

This typology demonstrates how industrial space might be delivered at ground floor with residential development above. This approach allows for small/medium scale industrial uses to be accommodated within the core of a block, providing a podium courtyard above to the residential development. This podium would then be wrapped in smaller components such as workshops to provide active street frontage. Layering the uses allows for some streets to be designed for heavier vehicles with alternate streets for residential. Consideration needs to be given in the design to protecting the usability of the industrial space and to mitigate the impacts of industry on residents.

Indicative density

Industrial floorspace	3,500-4,500m²/ha
Residential floorspace	250-350 homes/ha
Other floorspace	0-500m2/ha

Assumptions: Podium level used as industrial space, the podium is wrapped with maisonettes, retail, and workshops, residential buildings up to 30 storeys.



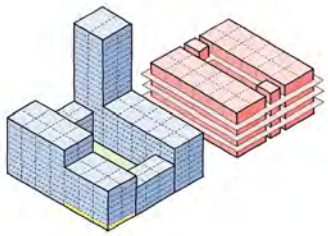
Industrial only - stacked

This typology is based around medium sized units accommodated at ground level, providing a podium space for rows of smaller units above. Multiple large goods lifts would be needed, together with wide decks or corridors to allow for pallet trucks to manoeuvre. The stacking of industrial space in this way has the benefit of increasing the intensity of activity, increasing synergies between businesses and the opportunity to develop shared resources such as cafes, tools or bookable spaces. There is higher costs associated with building and operating these units. For these reasons, this typology has been considered unsuitable without cross-investment from other development to offset.

Indicative density

Industrial floorspace	15,000 - 20,000sqm m^2/ha
Residential floorspace	0m2
Other floorspace	0m2

Assumption: stacked industrial buildings are up to 4 storeys

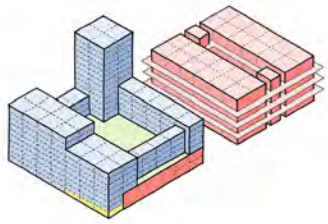


Stacked industrial adjacent to residential

This typology explores the potential to re-provide the existing industrial space in a stacked format and incorporating housing alongside. This typology could allow existing businesses could be rehoused in a single move and for the costs associated with the stacked typology to be offset by the development values of the residential. A key challenge for this approach is that the split in land use in this way potentially leaves residential use and industrial uses facing each other across a street, a challenge both in the form and function of the streetscape.

Indicative density

Densities would depend on the proportion of residential blocks to stacked industrial blocked. See indicative densities for each individual typology.

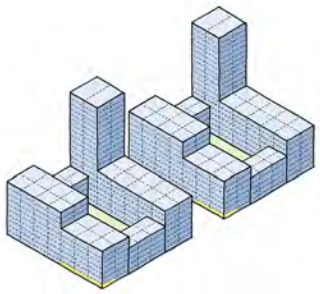


Hybrid including stacked and layered typologies

This approach combines the previous two options. The presence of the stacked industrial space helps to tackle early phasing and the retention of existing businesses within the site through single-move decanting. Following on from this, new blocks can be developed out which deliver the broader mix of uses. This typology has potential to intensify the use of the site and contains a mix of spaces and development forms which could maximise the options for different businesses. The mixed nature of the blocks adjacent to the solely industrial area is more flexible in terms of creating acceptable safe streets and spaces.

Indicative density

Densities would depend on the proportion of stacked industrial blocks to industrial layered with residential blocks. See indicative densities for each individual typology.



Residential only - courtyard blocks

While not industrial, this typology could be introduced through intensification, consolidation and release. It provides high development values (particularly with views over Walthamstow Wetlands) meaning it could be a valuable tool to help cross-subsidise stacked industrial development and to invest into a robust public realm which can support a diversity of needs.

Indicative density

Industrial floorspace	0m^2/ha
Residential	300-400 homes/ha
Other floorspace	500-1000m^2/ha

Assumption: Podium level used as ancillary and parking space, Frontages around podium used as maisonette, retail or community space, Residential buildings up to 30 storeys.

5 Stage 1: outputs

5.1 Sub-area strategy

5.1.1 There are two main sub-areas for Blackhorse Lane SIL as set out in section 4.3:

- Sub-area 1: Intensify and consolidate industry
- Sub-area 2: Retain businesses and integrate other uses

5.1.2 These sub-areas have been further delineated in response to: access, land use, character and land ownership (as per section 3).

- Sub-area 1A: Lockwood Way and Delta Group are two standalone industrial estates each formed around simple T-shaped access roads off of Blackhorse Lane.
- Sub-area 1B: Eden Girls School is a school under private freehold ownership, with its own access route. The site is self contained and inward looking, with walls along each border. Given its distinct use and character, it merits specific consideration.
- Sub-area 1C and Sub-area 2A: Uplands is an industrial area where buildings vary greatly in size, type, materiality and condition; a symptom of the fact that it has evolved gradually over time. Street access is more complicated, with Priestly Way winding through the site. A large part of Uplands is within a single ownership.
- Sub-area 2B: In Forest Estate, buildings are larger and sit loosely in space. Forest Estate can be accessed via the south part of Priestly Way, separating the area from Uplands. Forest Estate is under multiple ownerships.

5.1.3 Due to multiple ownership (see Figure 39) Blackhorse Lane SIL will not be brought forward as a single site, but will instead develop through a process involving multiple landowners. In order to support delivery:

- Each landowner should reprovide the industrial floorspace to retain existing businesses on their site, and, where possible, this should be part of the first phase of development;
- Landowners should work together where necessary to make development deliverable;
- The Stage 2 Masterplans should be set out in a way that each phase should function as a completed place regardless of the progress made on developing adjoining parcels, while also ensuring each phase contributes towards a greater vision beyond its own boundaries.

5.1.4 Given the above, positive landowner engagement and the creation of a landowner forum will be a critical part of delivering intensification at Blackhorse Lane SIL (see the Engagement Strategy in the Appendix).

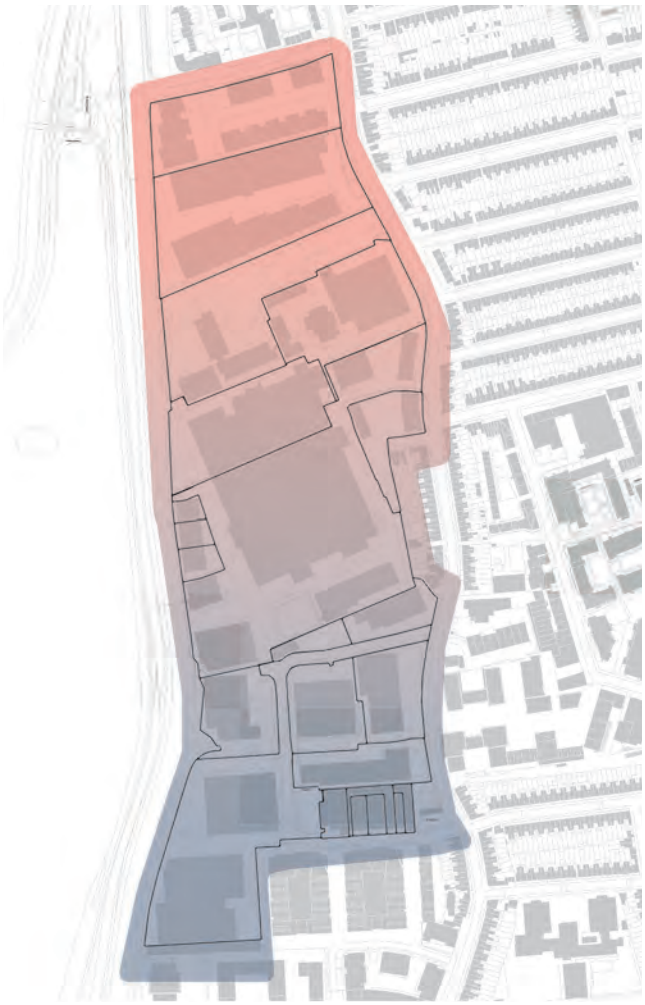


Figure 39 **Sub-areas with the landownership boundaries**

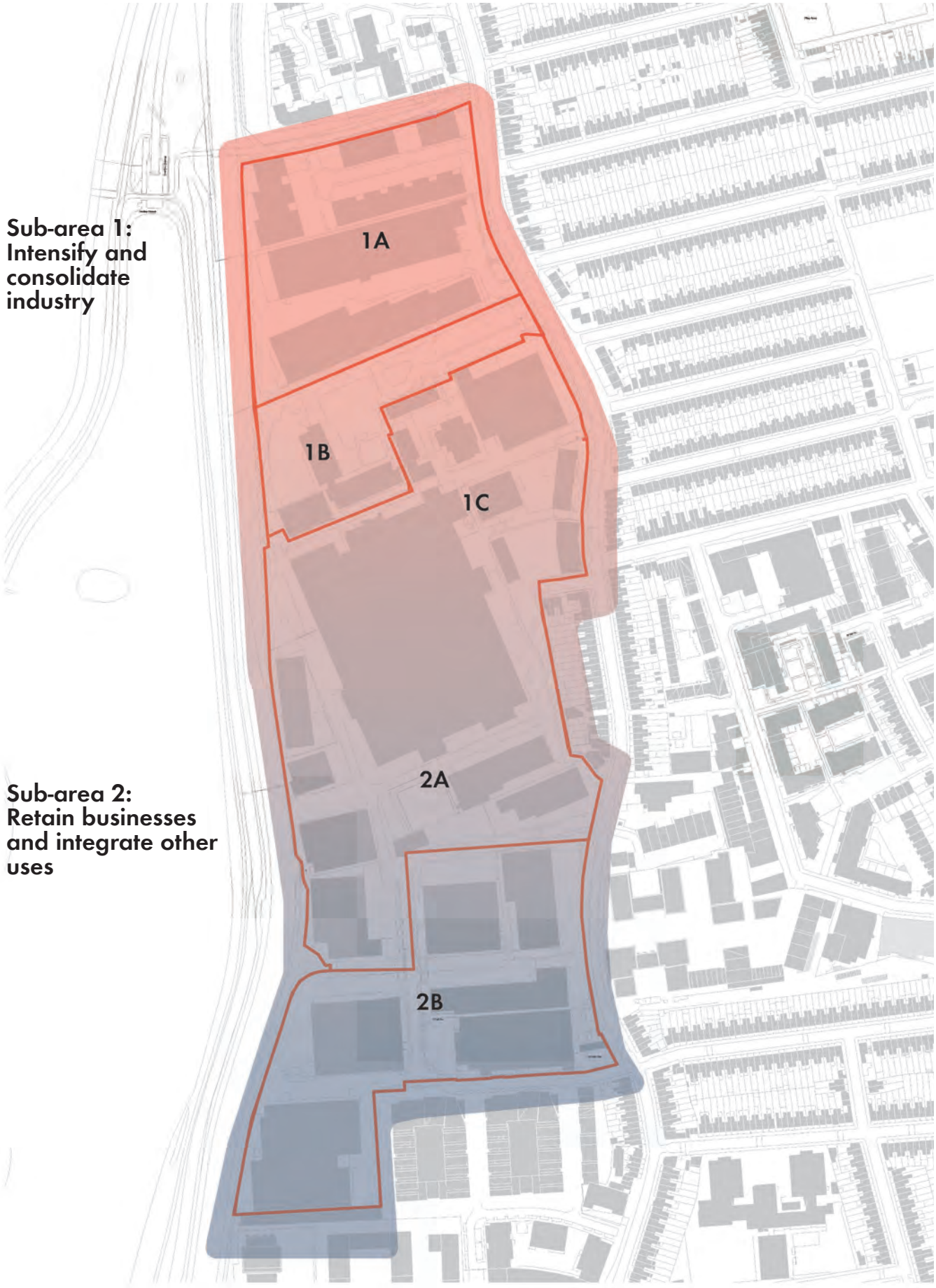


Figure 40 **Sub-areas**

5.2 Sub-area 1: Intensify and consolidate industry

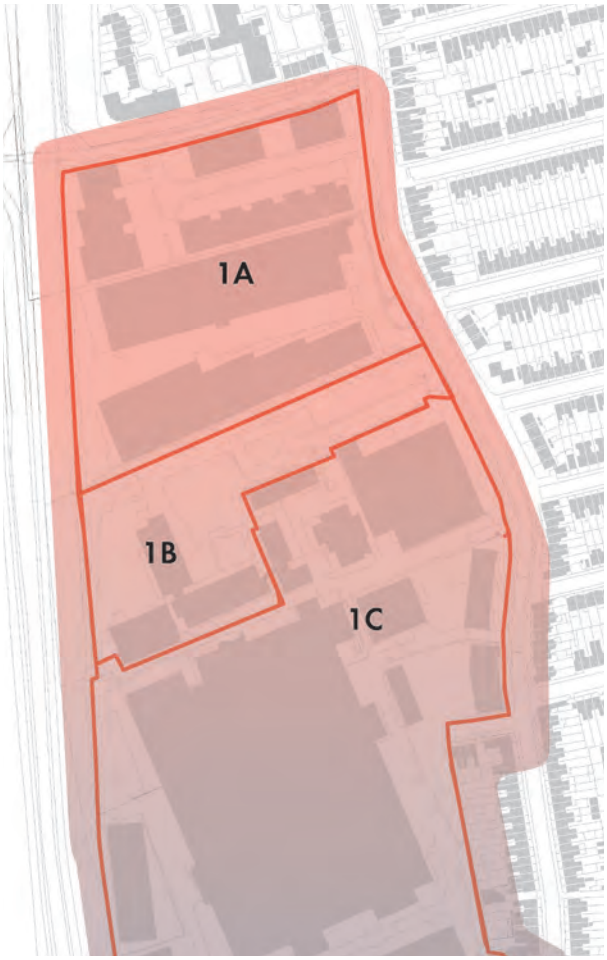
5.2.1 The focus for sub-area 1 is on intensification to deliver an increase in industrial capacity. Industrial topologies (single storey and stacked) would be more suitable/encouraged, with limited use of non-industrial typologies.

5.2.2 Intensification could be achieved through:

- Higher plot ratios: Plot Area Ratio gives an indication of how efficiently the land is being used. Redevelopment should aim for more efficient use of land. It will be important that any intensification ensures the reprovision of productive and valuable outdoor space such as yardspace, circulation space and amenity space, while also increasing the density and productivity of the site overall. Development in sub-area should aim to deliver the London Plan standard 65% plot area ratio for industrial land.
- Development of multi-storey 'stacked industrial' buildings: As section 4.4 explains, building multi-storey industrial units can, if well designed, create much more workspace in the same area. A multi-storey facility can also be run as a studio, a campus or a co-working platform (see Employment and Sector study in appendices for more information on platform case studies) with the opportunity to develop shared resources such as cafes, tools, or bookable spaces which support micro-businesses as well as to support synergies between businesses. These types of development can be particularly good at promoting start ups and innovation orientated businesses where the 'bump effect' is particularly important to business growth and inspiration.
- Smaller units: Focus on creating smaller units to respond to recent demand. This should help to increase density on site in terms of businesses per hectare. If designed as 'module' units, spaces can be flexibly merged to form larger units to respond to market demand in the future.

5.2.3 These types of space will support the continued organic growth of Blackhorse Lane SIL, responding to the trends in take up seen in recent years and mirroring changes within business activities which are particularly evident in East London (see section 2.5). Elements of these can also support LBWF Creative Enterprise Zone ambitions. The priority will be for redevelopment to rehouse existing businesses in sub-area 1, as well as look to house larger scale B8/B2 businesses from sub-area 2.

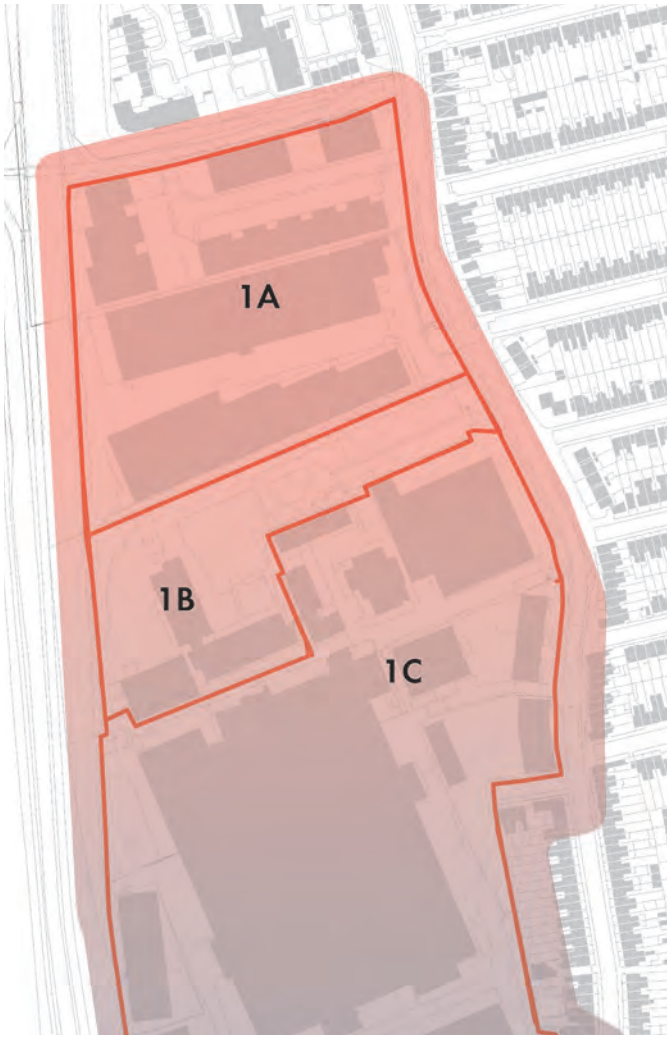
5.2.4 It is envisioned that new businesses in the area would compliment the existing uses, including: small scale manufacturing; wholesale, storage and distribution; designer-makers; media production; and R&D lab space. More detail on these proposed uses can be found in the adjacent table.



Industrial/ Employment Sector	Relevant Units	Propensity for Stacking	Frequency of deliveries [16, 17]	Notes
Small scale manufacturing (B1c and B2)	Small manufacturing units, particularly to retain existing businesses	✓ ✓	Medium	Stacking dependent on occupier and use of space. Existing businesses include: Square Mile Roasters, Signature Brewery, Exhale and All Plants.
Wholesale, storage and distribution (B8)	Small warehouse storage units, geared towards small-medium delivery frequency due to non-arterial road network	✓ ✓	Medium	Stacking dependent on eaves heights. Existing businesses include: Vibration Music, Zeppelin Rentals, Jump Bicycles.
Designer-makers (B1c, possibly B2)	Open Workspace Studio space Platform start up space Flexible/hybrid space	✓ ✓	Low	Shared and collaborative space is beneficial for smaller businesses. Potential to link with University to support start-ups. Local business examples include: Yonder, Blackhorse Workshop, Makerversity and Maker Mile.
Media production (B1a, B1c)	Open Workspace Co-work space Flexible/hybrid space	✓ ✓ ✓	Low	Shared and collaborative space is beneficial for smaller businesses. Delta currently on site could serve as an anchor to attract media companies as well as retain other existing businesses such as Powell & Ovel Display.
R&D lab space (B1b)	Shared lab space Space for R&D e.g. food labs, tech.	✓ ✓ ✓	Low	Mixed stacking and co-location dependent on nature of research . Potential to link to University to support start ups.

[16] GLA (Jan 2017) Industrial intensification Primer
[17] We Made That, Savills, Feasibility (May 2018) Industrial Intensification and Co-Location Study: Design and Delivery Testing

Sub-area 1: Intensify and consolidate industry



Sub-area 1A: Lockwood Way and Delta Group

5.2.5 The Lockwood Way estate is a simple industrial area formed as a T-shaped cul-de-sac of road with industrial units backing onto the boundary of the site on three sides.

5.2.6 The Delta Group has a similar structure to the south. Delta already represents a significant density of activity within the site and occupy high quality modern buildings. The site is large and would be able to accommodate a stand-alone programme of intensification and redevelopment.

5.2.7 The Lockwood Way site has a continuous gradient across the parcel, whereas at Delta a large flat space has been created with a steeper ramp down from Blackhorse Lane representing a whole storey height difference. This may represent a good opportunity to manipulate the levels to provide industrial space below a podium which also benefits from easy street-level access.

5.2.8 The two sites could be intensified and developed independently, based around the existing road layout, or together. Either way, with landowner coordination, a potential future north-south connection between the two sites would could form a loop of road which gives easier and safer access to larger vehicles.

5.2.9 Key principles for Lockwood Way and Delta Group:

- Potential for intensification to reach the 65% plot area ratio or more if including stacked industrial typologies
- Maintain the existing set-back from Blackhorse Lane, retaining or re-providing the existing trees
- Enable a new north-south vehicular connection
- Develop the southern boundary in a way which allows the school (1B) to work in its current configuration, while safeguarding the opportunity for future redevelopment

Sub-area 1B: Eden Girl's School

5.2.10 The existing school occupies former office and factory premises, and is set back from Blackhorse Lane via a long driveway. It is noted that the school has relatively recently invested in the improvement of its estates, and so is unlikely to be significantly altered or to relocate within the timescales for change that this document envisages for the wider area. Given this, the masterplan should respond to allow the school to continue to be operational in its existing configuration, while also keeping a number of options open:

- The school site could be developed as industrial in the event that the school does relocate. This should be drawn as a stand-alone scheme which isn't reliant on other interests coming forward, but which can connect with and continue a wider block structure for the area.
- While remaining operational in its existing location, a possible change for the school to consider is how the existing driveway serves their needs and whether this space might be re-integrated back into the wider area and the school gate moved west, closer to the building. Care will need to be taken to ensure that the street routes created to the school remain safe and focussed to the needs of walking and cycling.

5.2.11 Key principles for Eden Girl's School:

- To retain its existing community use
- Alternatively, if the school were to be relocated, potential to be redeveloped as industrial floorspace at the 65% plot area ratio or more if including stacked industrial typologies

Sub-area 1C: Uplands north

5.2.12 Uplands is characterised by a range of buildings, from smaller industrial units through to very large footprint buildings. Over recent years as former business have vacated these larger buildings have become increasingly unsuited to modern requirements in this location and so represent a significant opportunity for change.

5.2.13 The sub-area has a frontage onto Blackhorse Lane and benefits from easy vehicle access. The development of a more integrated street network, with consideration for turning, could aid in creating safer access for larger vehicles.

5.2.14 Consideration will need to be given to maintaining a high quality street frontage to Blackhorse Lane, and the retention and continued use of Uplands House could be particularly beneficial.

5.2.15 The south eastern edge of this sub-area backs onto an existing residential terrace, and will be expected to provide a suitable back-to-back plot relationship. This will be helped by the significant level change in favour of the existing gardens along the line of the boundary.

5.2.16 Key principles for Uplands:

- Potential for intensification to reach the 65% plot area ratio or more if including stacked industrial typologies
- Establishment of a more connected street pattern
- Develop the northern boundary in a way which allows the school (1B) to work in its current configuration, while safeguarding the opportunity for future redevelopment

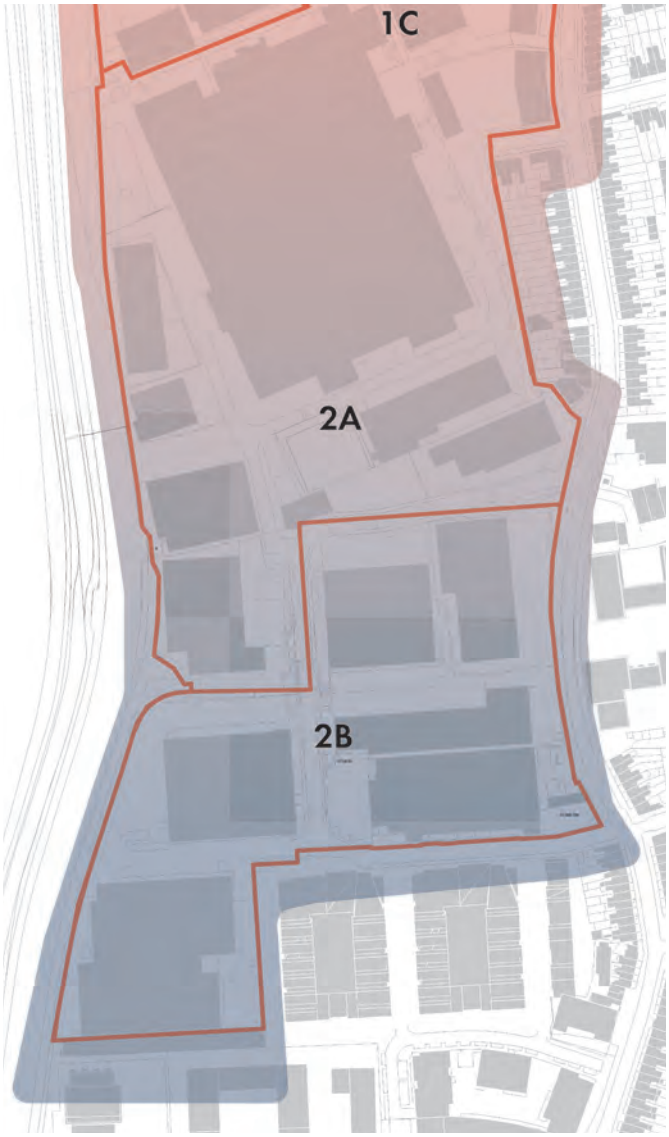
5.3 Sub-area 2: Retain businesses and integrate other uses

5.3.1 Sub-area 2 will focus on retaining existing businesses and integrating other uses to create a vibrant mixed-use neighbourhood to support its ongoing and evolving business function and enable the SIL to fully contribute to London's economy. This could include adjacent, layered and hybrid typologies.

5.3.2 Firstly, development should reprovide the industrial floorspace needed to retain existing businesses. The types of businesses on site seem to be largely compatible with residential and community uses (with the exception of a few larger scale B2/B8 businesses which could move to the north of the SIL). Furthermore, many of the existing businesses have customer-facing ancillary uses, such as cafes, brew-pubs and retail, which could benefit from more footfall and a better street environment. Engagement with businesses will be important to design a solution which works for them. This should take into consideration: vehicular movements/servicing, safety and security, unit layout, use of yardspace and public realm and noise and air quality.

5.3.3 The increased industrial capacity in sub-area 1, will support the integration of new homes and other uses, such as non-industrial workspace and community infrastructure in sub-area 2. This is reflective of the ambition to enhance Blackhorse Lane as a local centre, while responding to the higher PTAL rating and proximity to the Station of this area of the SIL. Appropriate design mitigation should look to ensure that uses can work harmoniously. More detail on the proposed uses can be found in the adjacent table.

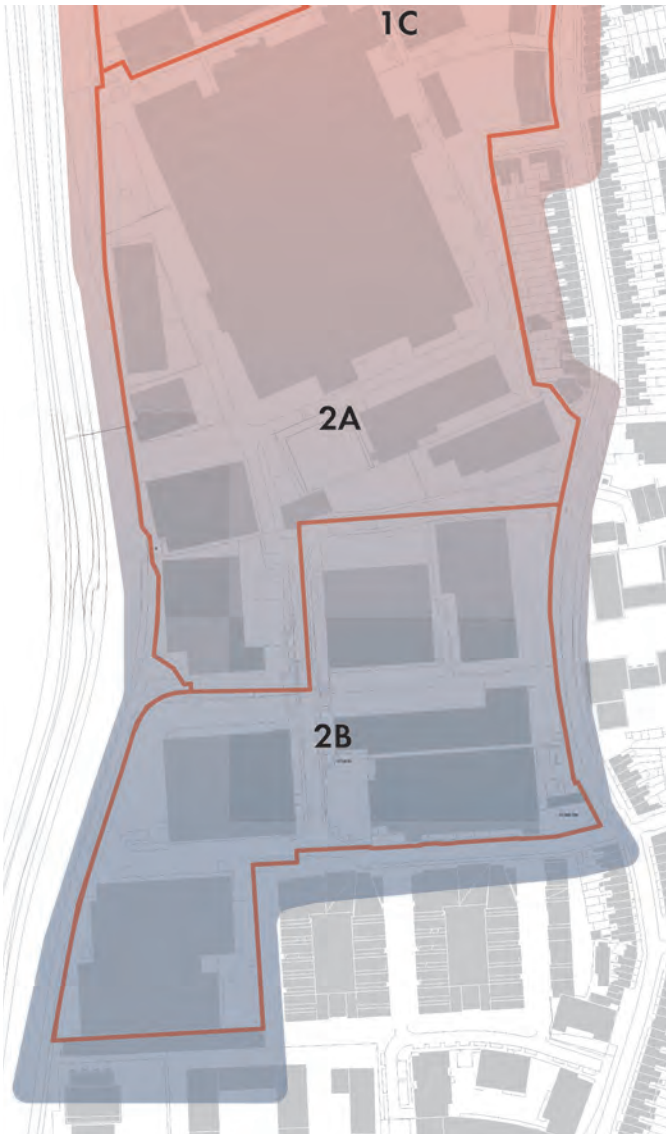
5.3.4 Ultimately, Blackhorse Lane is 'the home of people who make and create'. As the area evolves new and old industry should be celebrated and growth promoted in line with the Council's mantra: Keep, Seed and Grow.



Sector/Uses	Types of Spaces	Frequency of deliveries	Potential for integration with residential[18]	Notes
Small scale manufacturing (B1c and B2)	Small manufacturing units, particularly to retain existing businesses	Medium	✓ ✓	Stacking dependent on occupier and use of space. Existing businesses include: Square Mile Roasters, Signature Brewery, Exhale and All Plants.
Designer-makers (B1c, possibly B2)	Open Workspace Studio space Platform start up space Flexible/hybrid space	Low	✓ ✓ ✓	Shared and collaborative space is beneficial for smaller businesses. Potential to link with University to support start-ups. Local business examples include: Yonder, Blackhorse Workshop, Makerversity and Maker Mile.
Media production (B1a, B1c)	Open Workspace Co-work space Flexible/hybrid space	Low	✓ ✓ ✓	Shared and collaborative space is beneficial for smaller businesses. Local existing businesses such as Delta and Powell & Ovel Display.
R&D lab space (B1b)	Shared lab space Space for R&D e.g. food labs, tech.	Low	✓ ✓	Mixed stacking and co-location dependent on nature of research. Potential to link to University to support start ups.
Open workspace (B1a/B1b)	Flexible Studio / Co-working spaces (these can be occupied by a range of companies)	Low	✓ ✓ ✓	Shared and collaborative space is beneficial for smaller businesses akin to Switchboard Studios.
Leisure / Community / Civic Spaces (D1/D2)	Community Facilities, Gallery spaces, Leisure spaces (i.e. gyms / performance space / cinema etc.)	Medium	✓ ✓ ✓	Reflecting ambitions to enable the Black Horse Lane area to play a greater role as a neighbourhood centre and proximity to public transport provision.
Alternative Uses (C3 Residential)	Dwellings / Co-living / Build to Rent	Low	NA	Reflecting ambitions to enable the Black Horse Lane area to play a greater role as a neighbourhood centre and proximity to public transport provision.
Alternative Uses (A1-A5)	Retail and supporting ancillary uses	Medium	✓ ✓ ✓	Providing local supporting services for employees and residents within Blackhorse community.

[18] GLA (Jan 2017) Industrial intensification Primer

Sub-area 2: Retain businesses and integrate other uses



Sub-area 2A: Uplands South

5.3.5 Uplands is characterised by a range of buildings, from smaller industrial units through to very large footprint buildings. Over recent years as former business have vacated these larger buildings have become increasingly unsuited to modern requirements and so represent a significant opportunity for change. This is reflected by the large Warren Evans unit remaining vacant until smaller sub-lets of the space were made available.

5.3.6 This area would benefit from the creation of a more complete block structure by extending and connecting existing streets. The development of a more integrated street network will aid the safe access of larger vehicles. Consideration will need to be given to ways in which pedestrian and cycle safety can be delivered in areas where frequent heavier use is possible.

5.3.7 This sub-area is particularly affected by the presence of the Thames Water easement, necessitating a series of open spaces through the centre of the site to respond to this key constraint. This opportunity can be developed as a way of providing a positive overlap between different uses and creating vibrant public spaces.

5.3.8 The north eastern edge of this sub-area backs onto an existing residential terrace, and will be expected to provide a suitable back-to-back plot relationship. This will be helped by the significant level change in favour of the existing gardens along the line of the boundary.

5.3.9 Key principles for Uplands:

- Reprovide the industrial floorspace needed to retain existing businesses. Where possible, this should be part of the first phase of development
- Integrate other uses to create a mixed-use industrial neighbourood
- Establishment of a more connected street pattern
- Creation of mixed use public space and yards along the Thameswater easement

Sub-area 2B: Forest Estate

5.3.10 The southern area of the existing SIL is characterised by a series of larger industrial buildings framing a potentially cohesive street structure if it can be developed and augmented in the right ways.

5.3.11 The area is particularly important in providing the connection and continuity to the south, picking up on newly established route leading down towards the tube and rail station and extending the planned 'Maker's Street'. The routes need to be clear, legible and safe for walking and cycling. The interface with heavier and more frequent vehicle movements will therefore be important to manage.

5.3.12 The Dagenham Brook watercourse flows from east to west in a culvert across this sub-area. There is an opportunity to create a blue-green east west link to improve the ecological quality of Dagenham Brook and deliver a walkable route to the waterside.

5.3.13 The existing buildings on the eastern side of the parcel, against Blackhorse Lane, are currently set back from the road. This provides a welcome respite from the constricted nature of the street and should be a feature which is maintained, creating a wider public space at the point where the east-west green corridor and Blackhorse Lane cross, and potentially creating a public realm focus which will provide the core of a more established neighbourhood centre offer.

5.3.14 The character of the loop of existing road means that it should be relatively straightforward to maintain access for larger vehicles without requiring large turning movements or compromising pedestrian safety.

5.3.15 Key principles for Forest Estate:

- Reprovide the industrial floorspace needed to retain existing businesses or work with other landowners to re-house these businesses in sub-area 1. Where possible, this should be part of the first phase of development
- Integrate other uses to create a mixed-use industrial neighbourhood
- Consider aligning the connections and character to integrate with the residential neighbourhood to the south
- Establish a blue-green east-west corridor along the line of the Dagenham Brook

Conclusion

5.3.16 As described, these sub-areas represent the potential to create increased industrial activity on Blackhorse Lane SIL, reflecting LBWF and the GLAs ambitions around industrial intensification, and ensuring that the organic evolution of the business activities on the site are supported to enable the SIL to continue to fully contribute to the London economy. The redevelopment of the sub-areas as identified will foster economic growth in an area already experiencing much progression and diversification within its industry. This will be achieved by marrying industrial intensification, retention of existing businesses, facilitating growth of niche and new businesses in artisan and unique sectors, introducing alternative uses and creating footfall in an attractive environment

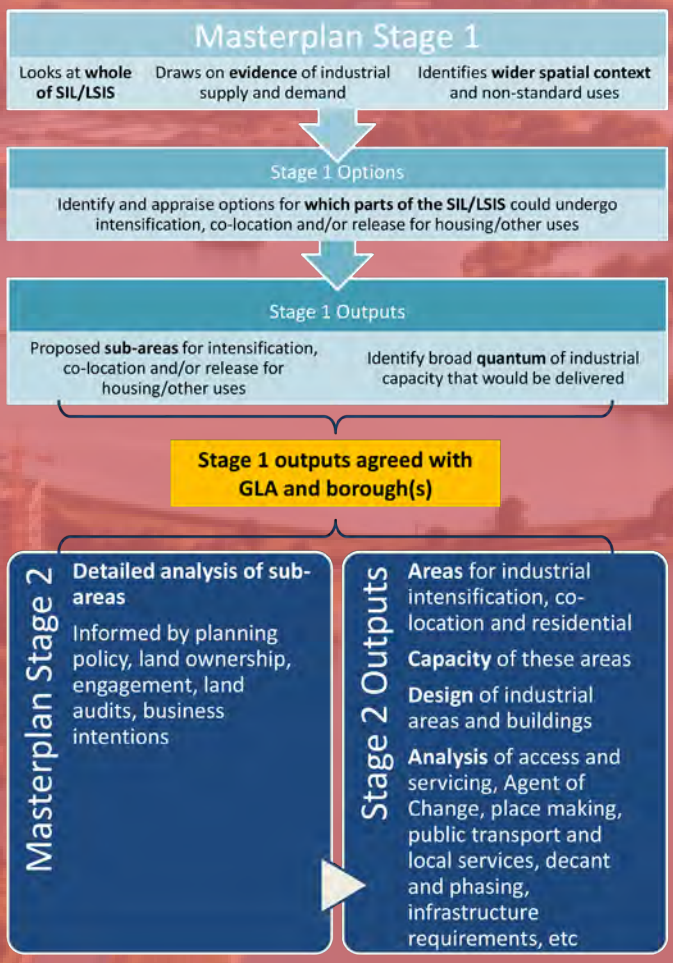
6 Next Steps

6.1 Next steps

6.1.1 Blackhorse Lane SIL demonstrates considerable potential. The evidence presented identifies that it would benefit from redevelopment, bringing opportunities for industrial intensification and introduction of supporting uses to maximise its economic contribution to the London economy. The sites opportunities and constraints clearly establish best use across different areas of the SIL, linked to clear economic drivers

6.1.2 The next steps in realising intensification at Blackhorse Lane are:

- Engagement with the GLA and LB Waltham Forest: The team will work with the GLA and LB Waltham Forest to agree the outputs from Stage 1 and to forge a collaborative approach which responds to the wider Waltham Forest and London context.
- Engagement with businesses, landowners and the wider community: A programme of engagement is planned with key stakeholders to help forge a shared vision for the area. This includes the creation of a landowner forum; 1-2- 1 meetings and a workshop with businesses to identify how they use their space, as well as to understand their aspirations for the future; and pop up events for the surrounding community. Further detail can be found in the Blackhorse Lane SIL Engagement Strategy in the Appendix.
- Stage 2 Masterplans: as per the GLA's 2018 practice note, Stage 2 masterplans can be brought forward by landowners (or a consortium of landowners) for the sub-areas in line with this Masterplan Stage 1 document. Each Masterplan for Stage 2 will include detailed analysis of the existing industrial capacity, the landownership and ensure adequate engagement takes place to enable a spatial framework to be set for each. The spatial frameworks will take into consideration land use and capacity, transport, access and servicing, placemaking, streets and public spaces, and infrastructure requirements. This process will be done in collaboration with LBWF and GLA.


Masterplan Stage 1
Looks at **whole of SIL/LSIS**
Draws on **evidence** of industrial supply and demand
Identifies **wider spatial context** and non-standard uses
Stage 1 Options
Identify and appraise options for **which parts of the SIL/LSIS** could undergo intensification, co-location and/or release for housing/other uses
Stage 1 Outputs
Proposed **sub-areas** for intensification, co-location and/or release for housing/other uses
Identify broad **quantum** of industrial capacity that would be delivered
Stage 1 outputs agreed with GLA and borough(s)
Masterplan Stage 2
Detailed analysis of sub-areas
Informed by planning policy, land ownership, engagement, land audits, business intentions
Stage 2 Outputs
Areas for industrial intensification, co-location and residential
Capacity of these areas
Design of industrial areas and buildings
Analysis of access and servicing, Agent of Change, place making, public transport and local services, decant and phasing, infrastructure requirements, etc