LB Waltham Forest
Employment Land Study

Final Report
May 2016
1. **Introduction**

1.1 This report is a key element of the London Borough of Waltham Forest’s planning policy evidence base and has been prepared by Bilfinger GVA on behalf of the Council. The purpose of the study is to identify the future growth needs of the local authority area to inform the strategic level spatial strategy to guide future site allocations and ensure the appropriate capacity is available in the most appropriate locations to accommodate employment requirements.

1.2 This Employment Land Study (ELS) report provides the technical assessment of the future demand for and supply of employment land within the LB Waltham Forest area. It considers the scale and nature of future employment growth, the resultant requirements for new floorspace, how suitable the existing/identified sites are for meeting this need and any quantitative or qualitative need for additional land to be identified.

1.3 The ELS focuses solely on activities that occupy “B Class” employment floorspace, i.e. those employment generating activities that occur within Offices (B1a), Research and Development premises (B1b), Industrial space (B1c and B2) and warehouse buildings (B8). Whilst these are important components of the Waltham Forest economy they do not capture all employment generating activity. Indeed the Waltham Forest “Business Mapping Study” (Regeneris, 2015) confirms that ‘non-B class’ activities such as education, health, retail and hospitality provide more jobs than B class sectors, a fact reinforced by analysis in the accompanying baseline report to this ELS and also the forecasts of future employment considered in this Report.

1.4 The ELS builds on the accompanying Baseline Report (Bilfinger GVA, May 2016) which established both the current conditions and recent changes within the Waltham Forest economy and commercial property market. This integrated assessment of the borough has helped identify how the economy has been changing during and post-recession and what is likely to drive future opportunities for growth.

1.5 The key summary messages to emerge from the Baseline Report were:

- That the future prospects for the borough need to be considered in the context of the strategic focus for economic growth in the Upper Lee Valley and London overall;
- That there is a strong land supply in neighbouring areas that will compete for similar business and occupier activity;
- Economic activity across the Upper Lee Valley and London more generally is shifting, with ‘knock on’ effects for Waltham Forest in terms of sectors and businesses that are seeking to locate here;
• The population is growing rapidly, with a particular focus on working age cohorts, which provides an opportunity to harness skills locally;

• There are high levels of ‘transience’ within the borough, suggesting that if economic potential is to be reached then retaining skilled workers will be key. The economic approach needs to support (and be supported by) the creation of attractive residential options;

• The population is active, with lower levels of inactivity than a number of comparator areas. However there are greater proportions of residents with low skills and low occupations, the outflow of labour to Central London is also significant;

• Economic activity within the borough tends to be lower value, with a focus on manufacturing and ‘public sector’ employment, as a consequence growth rates have also been low. However, there are signs this is changing with greater levels of creative and tech-based business activity;

• Markets are not evenly distributed across the borough. Demand for industrial space is more pronounced in the south and west with office demand predominantly focused to the north. This is linked to infrastructure provision (particularly the trunk road network), the location of larger town centres and the current location of property supply;

• The borough has a high level of small business activity and has seen an increase in startup and survival rates in recent years;

• Demand (in all use classes) tends to be for smaller units or amounts of floorspace;

• The commercial property market is limited, with low transaction levels and a narrow range and low quality of stock which, in turn, impacts on rent levels.

1.6 These themes and influences on Waltham Forest’s economic prospects have formed the basis of the analysis and conclusions within this report, which focuses on the assessment of future employment land needs and provides strategic recommendations relating to the scale, type and location of future employment land needs and floorspace delivery. The application and use of the evidence base and conclusions presented within the ELS will need to be aligned to wider considerations within the planning sector. This will include ongoing and future changes to the planning system which are likely to significantly alter the level of control and influence local plan making authorities will have over land use.
2. **Employment Growth and Floorspace Requirements**

2.1 The previous sections have set out the baseline position for Waltham Forest in terms of recent economic performance and trends within the local property market. Whilst this has highlighted the relatively low scale of economic activity traditionally, it also underlines the rapidly changing dynamics of the Waltham Forest economy, which has seen recent positive trends in terms of employment and business growth and demand for property.

2.2 Waltham Forest is also influenced by a range of factors and shifts occurring outside of the borough boundary, as the London economy continues to evolve and re-shape. There are a number of influences that suggest the future nature and scale of economic activity within Waltham Forest will be different from that of the past.

2.3 Key ‘external’ influences include:

- the increasing and improving connections of Waltham Forest economic activity to London growth poles (Kings Cross, Knowledge Quarter, Mid Town, Here East, iCity, QE Olympic Park, City / Liverpool Street / Broadgate),
- the location transition of the tech and creative sectors which are facing significant price and space pressure in the City Fringe and Hackney, driving the emergence of new makers, crafts and art businesses in the Upper Lea Valley,
- the residential market shift which is seeing rapid growth in values resulting in the trend of households growing up and out from Inner London bringing a new cohort of economically active and ambitious skilled residents to the borough.
- the advantageous logistics position of the borough (particularly in relation to the M11, the North Circular and the canals) which is likely to see a new role and requirements of its employment land for servicing the growing local and London-wide population.

2.4 It is against this background that the future requirement for employment floorspace needs to be considered. Whilst historic trends will help shape future activity, the changing nature of the London economy in general will have a significant impact on Waltham Forest’s economic character in the future.

2.5 In understanding the range and portfolio of future employment land and floorspace need it is important to understand the potential nature of employment growth within Waltham Forest over the plan period (and beyond) to ensure sufficient provision is made and protected within the Borough’s employment sites.

2.6 This section sets out the forecast scenarios used within this Study to understand the ‘reasonable alternatives’ for potential future growth.
**Forecasting Approach**

2.7 The approach to forecasting future employment growth and hence employment floorspace requirements has been developed in a manner that tests alternative growth rates, reflecting the dynamic nature of Waltham Forest. The forecasts provide an understanding of both the scale and nature of potential growth within the borough to help inform policy choices and show the future opportunity. The focus of policy should therefore be on maximising the opportunities presented, positively planning to manage growth and expansion.

**Forecast Base**

2.8 The employment growth forecasts draw on two different bases in order to understand the potential impacts of different perspectives of growth.

2.9 The first base forecast is drawn from the GLA Employment Projections (2015) as set out in GLA Working Paper 67 (July 2015), this provides updated ‘interim’ projections for London at the gross and sector level alongside interim trend-based employment for each borough. Whilst useful to understand the updated considerations from the GLA on future economic growth, particularly given the last projections were produced in 2013 and London’s economy has changed significantly since this time. However, it is important to note these borough-level projections will not provide a new base for the London Plan.

2.10 Given the interim nature of the GLA forecasts and their reliance largely on ‘trend based’ influences we have also drawn on the employment growth projections provided by Experian Business Strategies, these were finalised and published in May 2015. The Experian forecast factors in demographic trends and future expectations and changes. It therefore allows for expected shifts in age profiles, economic activity rates and the impact of changes to the ‘statutory’ retirement age. The model uses a base population projection that is consistent with those used by DCLG and interprets their outputs to forecast the influence the complete ‘basket’ of demographic factors have on employment rates in any location.

2.11 The use of two forecasts also helps to understand the potential sectoral distribution of employment growth. The Experian forecast provides estimates for 38 economic sectors across the full range of activity types which align to Standard Industry Classification (SIC) codes, allowing them to be translated into floorspace requirements and aligned with planning use classes.

2.12 The GLA Borough-level forecasts only provide a ‘total’ level of employment, with no sectoral breakdown available beyond that provided for London as a whole, which is clearly not relevant for individual boroughs. Whilst the total level is helpful to understand the scale of
growth it is not able to be translated directly into employment activities and therefore space
types and requirements.

2.13 To enable a consistent understanding of floorspace requirements to be developed we have
translated the total employment figure provided by the GLA into the 38 sectors used by
Experian. To do this we have calculated the share of employment within each sector for
each year of the forecast within the Experian model and applied these to the GLA jobs figure.
This allows employment to then be translated into floorspace types.

**Full Time Equivalent Estimates & Consistent Base Positioning**

2.14 Before floorspace requirements can be forecast two further modifications to the employment
projections have been required. Floorspace requirements are based on estimates of Full Time
Equivalent (FTE) employment levels given a ‘workspace’ is planned on how many people will
occupy it at one time. Whilst a full time employee will occupy a workspace at all times a part
time worker is likely to only occupy it half the time, therefore providing a workspace for each
part time worker would result in over-provision of space. The standard assumption, used in this
study, is that 2 part time workers equal 1 FTE.

2.15 Helpfully the Experian forecast is provided on an FTE basis; as such it is possible to directly use
this as the basis for future employment floorspace forecasting. However, the GLA forecasts
are provided on the basis of levels of ‘employment’, including all employees and self-
employment. Therefore to be utilised to forecast employment floorspace requirements we
have converted the employment figure into an FTE equivalent.

2.16 This conversion has been undertaken based on the share of employment within Waltham
Forest between full and part time employment. Across the whole economy in the borough
BRES 2013 data estimates that 31% of employment is classed as part time. Whilst it is
recognised that this level will vary by sector it has not been possible to align detailed BRES
information and GLA forecasts within this study, as such the average level is applied to all
sectors.

2.17 This changes the level of activity from which floorspace requirements are calculated, as
shown in the ‘snapshot’ data shown below.
Table 1 - Comparison of Employment and FTE

<table>
<thead>
<tr>
<th>Year</th>
<th>GLA Employment Estimate</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>85,000</td>
<td>71,825</td>
</tr>
<tr>
<td>2020</td>
<td>88,000</td>
<td>74,360</td>
</tr>
<tr>
<td>2025</td>
<td>91,000</td>
<td>76,895</td>
</tr>
<tr>
<td>2030</td>
<td>94,000</td>
<td>79,430</td>
</tr>
</tbody>
</table>

Source: GLA, GVA, 2015

2.18 The second challenge for creating consistent and comparable forecasts is the ‘starting point’ for the forecasts themselves. The Experian and GLA models provide different estimates of ‘current employment’ given their different methodologies and measures of employment, making it impossible to draw direct comparisons between the two.

2.19 To establish a consistent base from which growth and floorspace requirements are forecast we have drawn again on BRES data, using the “Total Employment” figure for Waltham Forest, again adjusted to reflect FTE jobs in line with the explanation above. This provides a base employment level of 57,200 jobs.

2.20 The Experian ‘sector shares’ are then applied to this total figure for 2013 to estimate the make-up of the Waltham Forest economy. Annual growth rates are then applied to each sector based on the rates within the original model to ascertain how employment will change over time.

2.21 The employment land requirement forecast uses this detailed sector breakdown as the basis for aggregating groups of activity into land use types. This approach provides a land and floorspace requirement for office (B1a/b), industrial (B1c/B2) and warehousing (B8) activity. Whilst this approach aligns with the guidance provided by the NPPF and NPPG and provides a robust basis for planning purposes it should be recognised that future delivery may not be as neatly categorised.

Other Assumptions

2.22 There are a number of other consistent assumptions which are applied throughout the different forecasting tests to derive future employment land requirements.

2.23 Using employment density assumptions we can translate job creation forecasts into additional floorspace requirements. As a base model we use the following employment densities, these are based on our understanding of the nature of economic activity within (and likely to be
attracted) to the area, the subsequent occupier requirements within these activities, and the guidance provided by the HCA Density Guide Third Edition, 2015:

- **B1a/b** – 12 square metres per employee (NIA). This reflects a potential mix of professional services, TMT and other ‘corporate’ activities – albeit all at a relatively small scale.
- **B1c/B2** – 36 square metres per employee (GIA). This reflects the ongoing demand for industrial space and also provides a reasonable ‘mid-point’ estimate for future studio and creative workshop requirements (such as the ‘planned’ density for Maker Spaces); and
- **B8** – 70 square metres per employee (GEA). This reflects the likely distribution role as a location for ‘final mile’ activities rather than strategic distribution.

2.24 The impact of variations to these assumptions is considered separately at the end of this section.

2.25 Floorspace estimates are translated into land requirements using assumed ‘plot ratios’ which estimate the amount of land required to accommodate development given ‘standard’ approaches to development and site coverage and make sufficient allowances for car parking, access/servicing and public realm treatments. The plot ratios used within the modelling are:

- **B1a/b** – 1.5;
- **B1c/B2** – 0.4; and
- **B8** – 0.4.

2.26 To convert floorspace into a land requirement requires the use of GEA figures, therefore both B1a/b and B2 floorspace estimates need adjusting as these are provided as NIA and GIA respectively. The NIA is increased by 20% whilst GIA is increased by 5% to estimate the GEA.

2.27 The assessment of employment land requirements usually also include allowances for both ‘windfall losses’ (i.e. employment space lost to other activities) and ‘churn’ i.e. the vacancy required within the stock to allow businesses to move.

2.28 Based on our understanding of employment land supply and losses within Waltham Forest, and guidance provided by the Council, we do not believe it is appropriate to plan to replace all floorspace that has been, or is planned to be, lost across the borough. In the main the sites lost have been largely defunct and under-utilised, therefore they were either not, or were unlikely to continue to, make a significant contribution to the local economy or cause significant displacement.

2.29 As such, future planning should seek to make provision for new growth rather than attempt to reinstate space that is deemed surplus to requirement by industries that have left the borough.
2.30 Within the model an allowance is made for the fact that the needs of businesses (such as location or property specification) change over time, requiring them to move. In other instances an existing business might cease its operations and a new business take over a site for redevelopment. For this to happen smoothly there is a need for certain levels of available vacant land. This type of demand has been called ‘churn’ demand or ‘frictional vacancy’.

2.31 An allowance for ‘churn’ is calculated from the average net ‘gain’ in employment floorspace within the Borough as recorded within the Annual Monitoring Report, as shown in Table 2 below.

<table>
<thead>
<tr>
<th></th>
<th>Office (sqm)</th>
<th>Industrial (sqm)</th>
<th>Warehouse (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013/14</td>
<td>2,047</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2012/13</td>
<td>119</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2011/12</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2010/11</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2009/10</td>
<td>-</td>
<td>-</td>
<td>245</td>
</tr>
<tr>
<td><strong>Average Annual Loss</strong></td>
<td><strong>361</strong></td>
<td><strong>0</strong></td>
<td><strong>41</strong></td>
</tr>
</tbody>
</table>

Source: LB Waltham Forest Annual Monitoring Reports

2.32 It typically takes two years to achieve a planning consent, site preparation and construction after a site has changed hands. For these reasons the annual net take-up of employment floorspace is multiplied by two to estimate the churn demand. This is, in effect, an allowance for the necessary frictional vacancy to allow the market and relocation chains to operate.

2.33 This allowance for churn, allows the commercial property market realities to be added to the baseline economic forecast.

**Forecast 1**

2.34 The first forecast used to understand the nature of potential growth within Waltham Forest is drawn from Experian and their borough-specific sector forecasts.

2.35 This forecast of employment growth would see just over 9,600 FTE jobs delivered within Waltham Forest between 2015 and 2031 an increase of 16%. Of this total growth approximately 60% of employment will be within non-B class sectors and, in theory at least, not accommodated within designated employment land.

2.36 In B class terms approximately 3,900 new FTE jobs will be created within Waltham Forest, a total increase of 17%. The forecast indicates 45% of these jobs (c.1,700 FTE jobs) would occur within B1a/b accommodation, with a further 38% (c.1,485 FTE jobs) within B8 properties and the remainder (c.660 FTE jobs) within industrial activity.
2.37 The floorspace requirements from Forecast 1 are shown below.

### Table 3 - Forecast 1 Land Requirement

<table>
<thead>
<tr>
<th>Floorspace Demand 2015 - 2031</th>
<th>Allowance for Churn</th>
<th>Change in floorspace</th>
<th>Change in Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>20,922</td>
<td>722</td>
<td>21,645</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>23,838</td>
<td>0</td>
<td>23,838</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>103,996</td>
<td>82</td>
<td>104,077</td>
</tr>
<tr>
<td>Total</td>
<td>148,757</td>
<td>804</td>
<td>149,560</td>
</tr>
</tbody>
</table>

Source: Experian Business Strategies, GVA, 2015

2.38 The base forecast identifies a total floorspace requirement of c.150,000sqm to 2031; this is driven by the long term requirement for warehouse floorspace (c.104,000sqm). The forecast identifies a requirement for industrial and office floorspace.

### Forecast 2

2.39 The second forecast used to understand the nature of potential growth within Waltham Forest is also drawn from Experian, however it considers the impact on employment within the economy based on the rate and sectoral composition of growth Experian expect for the whole of London.

2.40 The purpose is to understand whether a form of growth that isn’t tied to historic activity would require radically different amounts and types of employment floorspace and land. Given the pace at which London’s economy is evolving and the increasing ‘decentralisation’ of some activities testing this London-wide growth provides a reasonable alternative to the more locally orientated forecast in Forecast 1.

2.41 This forecast of employment growth would see just over 9,000 FTE jobs delivered within Waltham Forest between 2015 and 2031 an increase of 15%. Of this total growth approximately 63% of employment will be within non-B class sectors and, in theory at least, not accommodated within designated employment land.

2.42 In B class terms approximately 3,350 new FTE jobs will be created within Waltham Forest, a total increase of 15%. The forecast indicates 57% of these jobs (c.1,900 FTE jobs) would occur within B1a/b accommodation, with a further 29% (c.990 FTE jobs) within B8 properties and the remainder (c.460 FTE jobs) within industrial activity.

2.43 The floorspace requirements from Forecast 2 are shown below.
Table 4 – Forecast 2 Land Requirement

<table>
<thead>
<tr>
<th>Floorspace Demand 2015 - 2031</th>
<th>Allowance for Churn</th>
<th>Change in floorspace</th>
<th>Change in Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>22,868</td>
<td>722</td>
<td>23,590</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>16,718</td>
<td>0</td>
<td>16,718</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>69,138</td>
<td>82</td>
<td>69,220</td>
</tr>
<tr>
<td>Total</td>
<td>108,724</td>
<td>804</td>
<td>109,527</td>
</tr>
</tbody>
</table>

Source: Experian Business Strategies, GVA, 2015

2.44 The base forecast identifies a total floorspace requirement of c.110,000sqm to 2031; this is driven by the long term requirement for warehouse floorspace (c.69,000sqm). The forecast identifies a requirement for industrial and office floorspace.

Forecast 3

2.45 The third forecast used to understand the nature of potential growth within Waltham Forest is drawn from the GLA’s borough-specific total employment forecasts, translated into sectors based on Experian’s estimates of sector-based employment shares.

2.46 This forecast of employment growth would see less than 5,500 FTE jobs delivered within Waltham Forest between 2015 and 2031 an increase of 9%. Of this total growth approximately 63% of employment will be within non-B class sectors and, in theory at least, not accommodated within designated employment land.

2.47 In B class terms approximately 1,900 new FTE jobs will be created within Waltham Forest, a total increase of 9%. The forecast indicates 55% of these jobs (c.1,100 FTE jobs) would occur within B1a/b accommodation, with a further 36% (c.715 FTE jobs) within B8 properties and the remainder (c.165 FTE jobs) within industrial activity.

2.48 The floorspace requirements from Forecast 3 are shown below.

Table 5 – Forecast 3 Land Requirement

<table>
<thead>
<tr>
<th>Floorspace Demand 2015 - 2031</th>
<th>Allowance for Churn</th>
<th>Change in floorspace</th>
<th>Change in Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>13,020</td>
<td>722</td>
<td>13,742</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>5,890</td>
<td>0</td>
<td>5,890</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>49,952</td>
<td>82</td>
<td>50,033</td>
</tr>
<tr>
<td>Total</td>
<td>68,862</td>
<td>804</td>
<td>69,666</td>
</tr>
</tbody>
</table>

Source: GLA, GVA, 2015
2.49 The base forecast identifies a total floorspace requirement of c.70,000sqm to 2031; this is driven by the long term requirement for warehouse floorspace (c.50,000sqm). The forecast identifies a small requirement for additional industrial and office floorspace.

**Forecast 4**

2.50 The fourth forecast used to understand the nature of potential growth within Waltham Forest is also drawn from GLA information and, like Forecast 2, considers the impact on employment within the economy based on the rate of growth the GLA expect for the whole of London.

2.51 As with Forecast 3 the total employment level predicted by the GLA is translated into sector growth based on Experian’s forecast. However, unlike Forecast 3 these shares are based on the Experian London-wide forecast rather than Waltham Forest.

2.52 This forecast of employment growth would see just under 6,000 FTE jobs delivered within Waltham Forest between 2015 and 2031 an increase of 10%. Of this total growth approximately 63% of employment will be within non-B class sectors and, in theory at least, not accommodated within designated employment land.

2.53 In B class terms approximately 2,200 new FTE jobs will be created within Waltham Forest, a total increase of 10%. The forecast indicates 56% of these jobs (c.1,200 FTE jobs) would occur within B1a/b accommodation, with a further 35% (c.750 FTE jobs) within B8 properties and the remainder (c.210 FTE jobs) within industrial activity.

2.54 The floorspace requirements from Forecast 4 are shown below.

<table>
<thead>
<tr>
<th>Floorspace Demand 2015 - 2031</th>
<th>Allowance for Churn</th>
<th>Change in floorspace</th>
<th>Change in Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>14,549</td>
<td>722</td>
<td>15,271</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>7,581</td>
<td>0</td>
<td>7,581</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>52,902</td>
<td>82</td>
<td>52,984</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>75,032</strong></td>
<td><strong>804</strong></td>
<td><strong>75,836</strong></td>
</tr>
</tbody>
</table>

Source: GLA, GVA, 2015

2.55 The base forecast identifies a total floorspace requirement of c.76,000sqm to 2031; this is driven by the requirement for warehouse floorspace (c.53,000sqm). The forecast also identifies a requirement for industrial and office floorspace.
Potential Impacts of Higher Density Development

2.56 The forecasting model used above draws on ‘industry standard’ employment densities and plot ratios to translate employment into floorspace and land requirements. However, as recognised within the HCA Density Guide, these assumptions can vary significantly based on the nature of actual activity and its location.

2.57 These variances are particularly common within industrial and warehousing activity, where the scale of operation, level of automation and nature of individual activity can all impact employment densities significantly.

2.58 As an example, the Density Guide provides a large range for warehousing activity, based on the scale and nature of the distribution activity undertaken, with much lower densities experienced within large scale provision and national/regional distribution centres. Given Waltham Forest is not considered a location for large scale strategic distribution activities of the type found within Enfield (for example) it is not unreasonable to assume more intensive activity within this sector will be achieved given it is likely to be closely associated with other ‘production based’ activity.

2.59 Similarly, industrial activity within Waltham Forest has tended to be increasingly focused on higher value and smaller scale production activity rather than larger traditional manufacturing. This has been borne out by the property market analysis within the Baseline Report, which highlights the dominance of small unit take up within the borough since 2010.

2.60 The borough has also seen a rise in shared and managed small workspaces, which deliver much higher levels of employment per square metre than larger factories, particularly where these are operated on a membership basis. The Density Guide 3rd Edition suggests shared Maker Spaces and Co-working facilities can achieved effective densities similar to those of more traditional office based activities. Again this suggests that future employment in the borough will be delivered at a higher density than currently achieved.

2.61 Plot ratios can also vary significantly. Smaller scale industrial and warehouse activities require less space for servicing and loading, and can therefore occupy sites more efficiently, albeit still requiring servicing space. Space may also be delivered across a number of storeys, therefore increasing usage of sites.

2.62 Outside of industrial and warehousing activity locating office development in the borough’s more accessible locations, where public transport provision is at its highest, would allow these activities to delivered at higher densities, again increasing the efficiency of land uses. In particular new office stock within Walthamstow town centre could achieve much higher plot
ratios than used in the forecasts, although it needs to be recognised that this density would be tempered by provision on the borough’s other employment sites.

2.63 Given these influences, we have provided a sensitivity analysis of each forecast based on the following assumption alterations:

**Table 7 - Revised Modelling Assumptions**

<table>
<thead>
<tr>
<th>Employment Density</th>
<th>Plot Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>10</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>25</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>50</td>
</tr>
</tbody>
</table>

2.64 Applying these revised assumptions to the forecasts provides the following floorspace and land requirements for the borough between 2015 and 2031.

**Table 8 - Density Sensitivity Test Outputs**

<table>
<thead>
<tr>
<th></th>
<th>Forecast 1</th>
<th>Forecast 2</th>
<th>Forecast 3</th>
<th>Forecast 4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floorspace</td>
<td>Land</td>
<td>Floorspace</td>
<td>Land</td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>18,158</td>
<td>1.1</td>
<td>19,779</td>
<td>1.2</td>
</tr>
<tr>
<td>Industrial</td>
<td>16,554</td>
<td>2.2</td>
<td>11,609</td>
<td>1.5</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>74,364</td>
<td>12.4</td>
<td>49,466</td>
<td>8.2</td>
</tr>
<tr>
<td>Total</td>
<td>109,076</td>
<td>15.7</td>
<td>80,854</td>
<td>11.0</td>
</tr>
</tbody>
</table>

2.65 Unsurprisingly the delivery of space that enables a higher density and plot ratio to be achieved results in a significantly smaller land requirement for the borough. Based on standard assumptions the borough would need to identify between 15 and 34 hectares of additional land, however this range is reduced to between 7 and 16 hectares based on the revised density assumptions.

**Sensitivity Testing**

2.66 Despite being based on established and well respected base employment growth forecasts the results presented above appear to provide a result for Waltham Forest which does not align with recent trends in space demand or the portfolio of land and premises available within the borough.
2.67 All growth forecasts predict a significant level of jobs growth within the warehousing (B8) sector, representing around a third of all new jobs in B class sectors over the period to 2031. However, historically (based on Experian data) employment in the sector has been a much weaker contributor to employment growth.

2.68 Over the period between 2008 and 2010 the sector was a significant contributor to B class employment contraction in the borough, with the loss of employment in B8 activities contributing on average 40% of all B class losses. Since the recession to 2014 warehousing has contributed to employment growth, however this has been at an average rate of c.19%. The future projections suggest that this ‘contribution rate’ will increase over the period between 2015 and 2031 to an average of 30% of employment growth.

2.69 Whilst Waltham Forest lies in an area of strong market demand for warehousing space this has tended to focus to the west of the Upper Lee Valley, with limited major B8 development in Waltham Forest itself. Given the difference in infrastructure provision in Waltham Forest to areas such as Enfield (where there are more direct connections to the M25 and A406 as well as larger link roads such as the A10 and A1056) and a more constrained land supply it is perhaps unlikely that the growth in employment would be as significant as the forecasts suggest.

2.70 Our own analysis, as well as that by others such as the Regeneris Business Mapping Study, suggests that the economy is becoming more strongly orientated to a range of new sectors that occupy smaller workshop, studio and office spaces. For small businesses in particular the economic make up of Waltham Forest is much more closely aligned with locations closer to Central London such as Hackney and Haringey than it is Outer London boroughs such as Enfield.

2.71 The nature of workspaces and the infrastructure provision also provide a similar context to more centrally aligned locations, with a higher provision of public transport via the Victoria, Central and London Overground lines and a finer grain road network more reflective of inner than outer London.

2.72 Given this physical and business context there are strong reasons to suggest that the growth of Waltham Forest may occur in a different pattern to that predicted by the forecasts. This would be exacerbated by the successful implementation of policy objectives to intensify the use of land across the borough and nurture the growth of new economic activities.

2.73 To assist the borough in understanding the potential floor space and land requirements of an alternative form or mix of employment growth we have considered two further sensitivities that seek to understand growth more orientated towards inner London sectoral mixes, in particular understanding the impact this has on warehousing need in particular.
2.74 To estimate this impact we have considered the growth rates Experian expect to occur within a number of ‘inner north London’ boroughs including Camden, Islington, Hackney and Haringey.

2.75 These rates have been applied to the Waltham Forest 2013 base, in line with the methodology explained earlier in this section. This would see total employment within Waltham Forest grow by approximately 15% over the period to 2031, with 66% of growth occurring within non-B class sectors.

2.76 Within B class activity the inner north London form of growth would see 75% of employment within office activity, with the balance shared between industrial and warehouse based activity.

<table>
<thead>
<tr>
<th></th>
<th>Floorspace Demand 2015 - 2031</th>
<th>Allowance for Churn</th>
<th>Change in floorspace</th>
<th>Change in Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>27,462</td>
<td>722</td>
<td>28,185</td>
<td>2.3</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>4,634</td>
<td>0</td>
<td>4,634</td>
<td>1.2</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>47,357</td>
<td>82</td>
<td>47,439</td>
<td>11.9</td>
</tr>
<tr>
<td>Total</td>
<td>79,454</td>
<td>804</td>
<td>80,257</td>
<td>15.3</td>
</tr>
</tbody>
</table>

2.77 Overall the land requirement for the borough is similar to that of the GLA Economics based forecasts, however it would see a marginal rebalancing of provision away from warehousing towards office space.

2.78 The inclusion of Camden and Islington within this analysis could potentially ‘skew’ analysis towards CAZ activity, rather than the nature of economic activity usually occurring outside of Zone 1. To allow for this change we have also run the Experian based forecast using just the anticipated growth rates for Hackney and Haringey, given they have an economic composition much more closely aligned with recent trends in Waltham Forest.

2.79 Using this sensitivity sees employment within the borough growing by 11% by 2031, with 70% of this growth driven by non-B class activities. Under this scenario over 30% of growth would be within warehousing activity.
### Table 10 – Sensitivity 2: Hackney & Haringey Growth

<table>
<thead>
<tr>
<th></th>
<th>Floorspace Demand 2015 - 2031</th>
<th>Allowance for Churn</th>
<th>Change in floorspace</th>
<th>Change in Land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>17,669</td>
<td>722</td>
<td>18,391</td>
<td>1.5</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>-5,033</td>
<td>0</td>
<td>-5,033</td>
<td>-1.3</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>48,102</td>
<td>82</td>
<td>48,184</td>
<td>12</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>60,738</strong></td>
<td><strong>804</strong></td>
<td><strong>61,542</strong></td>
<td><strong>12.2</strong></td>
</tr>
</tbody>
</table>

As shown growth more similar to the boroughs of Hackney and Haringey would see a requirement for 12ha of B8 land, a 1.3ha decrease in need for industrial land and a 1.5ha requirement for office land.

As noted above recent market performance, the nature of new workspace delivery and the type of land and premises within Waltham Forest suggests that future employment growth and floorspace demand will be orientated towards smaller scale activity. Coupled with high (and improving) public transport accessibility both employment density and land utilisation are likely to be higher than ‘industry norms’ may suggest.

Based on the assumptions on increased utilisation and efficiency presented above (Table 7) the floorspace and land requirements associated with the two sensitivity tests are set out below.

### Table 11 - Sensitivity Tests: Enhanced utilisation

<table>
<thead>
<tr>
<th></th>
<th>Sensitivity 1</th>
<th>Sensitivity 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floorspace</td>
<td>Land</td>
</tr>
<tr>
<td>Office (B1a/b)</td>
<td>23,607</td>
<td>1.9</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>3,218</td>
<td>0.6</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>33,908</td>
<td>5.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>60,734</strong></td>
<td><strong>8.1</strong></td>
</tr>
</tbody>
</table>

### Conclusions

It is clear from the forecast analysis that there is a requirement to accommodate additional employment floorspace within the borough across all use classes to allow the economy to grow. As noted in the baseline report, to a large degree employment growth will be driven by a range of ‘external factors’ that are shaping Waltham Forest more generally, most notably the strong growth in the population and the migration of businesses from inner London.

Strategic economic trends are also influencing the scale and nature of demand for employment land within Waltham Forest, with the on-going growth of the distribution sector (for example) influencing the need for additional warehousing capacity.
Each forecast scenario has sought to consider the potential alternate scales and mixes of economic growth that could come forward over the plan period within the borough. What is clear is that no single forecasting approach provides the appropriate basis for future planning given the differences in either the scale or mix of requirements.

In recommending the basis for future planning it is therefore relevant to take the forecasts as a starting point and consider them, alongside the other evidence provided in this Study and other work prepared on behalf of the Council, such as the Business Mapping Study and the Creative Enterprise Zone Feasibility Study, to arrive at a ‘consensus projection’ for the borough.

On this basis, drawing on the totality of evidence that exists and the constraints that face the borough in terms of land supply, it would be appropriate to plan for a ‘mid-point’ level of growth, suggesting a target of 2,750 FTE jobs within the B class sectors.

Both our analysis of strategic market trends and the work prepared by others on behalf of the Council suggest that the economic future of the borough lies within a range of activities that are likely to be more focussed on either office or shared workspace environments. This will mean that growth will be focussed much more significantly towards the office sector, with locations such as Enfield and Broxbourne continuing to be the focus for larger industrial activity. As such in the future we would expect this growth to be shared 70% for ‘office’ activity, 10% for industrial and 20% for warehousing.

Based on this share of demand and drawing on the assumptions outlined in previous subsections of the paper to the report we project a future requirement of circa 57,000sqm of additional floorspace. This assumes that space is utilised at relatively high density in line, reflecting the focus of market activity and the type of space that will come forward.

This overall requirement breaks down to the need to accommodate an additional c.19,000sqm of office floorspace, c.10,000sqm of industrial space and 28,000sqm of warehouse space. This would require an indicative land provision of between 7.2ha and 10.6ha depending on the intensity of development, again given the likely scale and nature of activity space is likely to be developed at high plot utilisation levels and therefore the land requirement would be at the at the lower end of this range.

This level of requirement will enable the borough to balance different needs and plan to accommodate a balance between housing and economic growth. Even this projection is likely to present some challenges in land capacity given the limited land supply within the borough, this is considered in more detail in following sections of this report.
3. **The Employment Site Portfolio**

3.1 This section considers Waltham Forest’s supply of employment land and floorspace within the Borough. This analysis is based on detailed on-site survey of the key characteristics of each employment site, which contributes to the site assessment matrix and site survey forms; included as Appendices to this report.

**Supply Overview**

3.2 The first step in reviewing the portfolio of employment sites has been to agree a comprehensive list of sites that currently accommodate B class employment activity. An initial list of sites has been provided by the Council and additional sites have been added to this list where necessary. In line with NPPG guidance, analysis has focussed only on sites that are greater than 0.25ha in scale.

3.3 **That is not to say that smaller sites are not important** in meeting a range of business’s needs, particularly given the findings of the Business Mapping Study and the level of employment activity outside of the designated employment sites. However, for the purposes of this study it is important to focus on those sites that make a significant contribution to the borough’s employment land stock and offer opportunities to accommodate employment growth.

3.4 The Council should seek to retain smaller sites below the threshold where these remain active and provide the type of floorspace required by businesses. This will be particularly critical within the boroughs town centres where sites are unlikely (on their own) to be above the survey threshold. As discussed later in this report the town centre sites in particular will be a vital components of the boroughs approach to meeting future demand and will, as far as possible in the light of extensions to permitted development rights, need to be protected.

3.5 In total 40 active employment sites were identified within the Borough, totalling 140.32ha of employment land plus one site which is currently vacant (0.75ha). This figure excludes a number of sites which are not considered to be in active employment use and are alternatively classified as being; vacant employment sites, new residential development sites, potential future employment sites and existing sites below the 0.25 threshold, as shown below in Table 12. It also excludes three sites which were excluded to avoid double-counting / overestimating (which duplicated, or largely crossed over with, other included sites, and one of which fell largely outside the Borough boundary).

3.6 The excluded sites which are no longer considered to be in employment use are discussed in more detail in a later section, accompanied by Table 26.
Table 13 shows the three sites which were identified as being less than 0.25ha, and were therefore excluded from the group of active employment sites. All excluded sites from the active employment site category are included within the site assessment matrix tables; in red for those below the 0.25ha threshold and for those excluded to avoid double-counting, and highlighted in blue for residential development. Many sites proved to be identical to another differently labelled site, and in these cases the site is included as one line in the site assessment matrix table with the other sites it is the same as indicated in brackets in the site reference column.

**Table 12 - Site Categorisations**

<table>
<thead>
<tr>
<th>Site Classification</th>
<th>Number of Sites</th>
<th>Total Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active employment Sites: B class</td>
<td>26</td>
<td>112.04</td>
</tr>
<tr>
<td>Active employment sites: some non B class uses</td>
<td>14</td>
<td>28.28</td>
</tr>
<tr>
<td>Vacant employment sites</td>
<td>1</td>
<td>0.75</td>
</tr>
<tr>
<td>New residential development sites</td>
<td>19</td>
<td>20.57</td>
</tr>
<tr>
<td>Potential future employment sites</td>
<td>1</td>
<td>2.50</td>
</tr>
<tr>
<td>Existing sites below 0.25ha threshold</td>
<td>3</td>
<td>0.43</td>
</tr>
<tr>
<td>Sites exclude to avoid double-counting</td>
<td>3</td>
<td>1.64</td>
</tr>
<tr>
<td><strong>All Sites</strong></td>
<td><strong>67</strong></td>
<td><strong>166.21</strong></td>
</tr>
</tbody>
</table>

**Table 13 - Employment Sites below 0.25ha threshold**

<table>
<thead>
<tr>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Designation</th>
<th>Area Cluster</th>
<th>Site Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEA19 (34)</td>
<td>Hatherley Mews, Units 1-40</td>
<td>Borough Employment Area</td>
<td>Cluster 3 - Walthamstow</td>
<td>0.16</td>
</tr>
<tr>
<td>BEA21 (35)</td>
<td>East London Office Centre</td>
<td>Borough Employment Area</td>
<td>Cluster 3 - Walthamstow</td>
<td>0.04</td>
</tr>
<tr>
<td>21</td>
<td>Lennox Trading Estate</td>
<td>LBW Clusters</td>
<td>Cluster 4 - Upper Lee Valley OA</td>
<td>0.24</td>
</tr>
</tbody>
</table>

3.7 Outside of these excluded ‘sites’ a number of standalone businesses within the borough’s town centres have also been excluded from the site survey process as they would fall beneath the threshold. However, properties such as Strettons, Church Hill and Juniper House have been considered as part of the wider review of Walthamstow town centre.

---

1 Includes sites with 0-25% non B class uses
2 Includes sites with more than 25% B class uses
3.8 Figure 1 shows the location of the 67 sites identified within the Borough (including those that were subsequently excluded from the site assessment process).

3.9 Whilst the active employment sites are located throughout the Borough there is evidence of parts of the Borough where no employment uses have been identified, and of key employment area clusters. These key clusters within the Borough are examined in further detail in the subsequent analysis.
Figure 1 - Overview Map of All Sites
Site Assessment Approach

3.10 The 41 employment sites (those active or currently vacant) were assessed by undertaking the following aspects:

- **Site visit** (on-site);
- **Site visit photographs** (on-site);
- **Completion of site survey form** (on-site and desk based for certain elements);
- **Analysis of the following data** (desk-based);
  - Statutory Designations e.g. habitat, landscape, flooding etc.
  - CoStar Focus availability data (2015) – indicating vacancy levels
- **Categorisation of sites into sub-markets** (desk-based):
  - Cluster 1 – Chingford & Highams Park
  - Cluster 2 – North Circular Corridor
  - Cluster 3 – Walthamstow and Wood Street
  - Cluster 4 – Lee Valley Opportunity Area (OA)
  - Cluster 5 – Leyton & Leytonstone
- **‘Traffic light’ categorisation of sites in Employment Sites Assessment Matrix** (desk-based – drawing on the site surveys);
- **Categorisation of sites into 3 groups advising on future action** (desk-based):
  - Protect and Maintain
  - Protect and Enhance
  - Monitor and Manage

3.11 The on-site aspects of the assessment process and the desk-based analysis of the data indicated above, allowed for sites to be considered based on a range of criteria, using a ‘traffic light’ categorisation system where red is considered a disadvantage for an employment site and green is considered an advantage. For the results of this assessment, presented in the Site Assessment Matrix, see Appendix 1.

3.12 Table 14 shows details recorded within the site survey forms were categorised into red, amber and green for the 11 main criteria considered within the forms. Four further criteria are considered within the table, but categorised out with the traffic light approach.
### Table 14 - Traffic light categorisation of sites in the matrix based on site survey forms

<table>
<thead>
<tr>
<th>Location Character</th>
<th>Included Sections from Site Survey Forms</th>
<th>Categorisation</th>
<th>Categorisation</th>
<th>Categorisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Description: Location character</td>
<td>Site Description: Location character</td>
<td>Mainly residential with few commercial uses</td>
<td>Mixed commercial and residential area</td>
<td>Well established commercial area</td>
</tr>
<tr>
<td>Predominant Occupier Nature</td>
<td>Site Description: Nature/Significance of existing occupiers</td>
<td>I = International</td>
<td>N = National</td>
<td>L = Local</td>
</tr>
<tr>
<td>Building Quality</td>
<td>Existing Conditions: Quality of buildings</td>
<td>Poor Very Poor i.e. significant dilapidation of buildings. Possible structural problems including cracks in externals, walls, leaking roofs, damp, broken windows. Limited lifespan without major repairs/renovation.</td>
<td>Average i.e. buildings adequate for existing user adequately maintained no visual evidence of major dilapidation. Reasonable probability of re-occupation if existing occupier vacates - possibly minor works required.</td>
<td>Good Very Good i.e. all buildings in excellent or good condition/upkeep. Well maintained/managed and no obvious problems. Possible evidence of some lack of maintenance /upkeep (holes in fence, peeling paint). High probability of re-occupation if existing occupier vacates - no works required.</td>
</tr>
<tr>
<td>On-Site Amenities</td>
<td>Existing Conditions: On-site amenities</td>
<td>None evident</td>
<td>Limited range of: retail (convenience and comparison), restaurant/café, gym/sports, bank, hotel, crèche, education and other</td>
<td>Wide range of: retail (convenience and comparison), restaurant/café, gym/sports, bank, hotel, crèche, education and other</td>
</tr>
<tr>
<td>Proportion of non B Class Floorspace</td>
<td>Existing Conditions: Proportion of floorspace in non B class use</td>
<td>50-100% non B class</td>
<td>25-49% non B class</td>
<td>0-24% non B class</td>
</tr>
<tr>
<td>Neighbouring Amenities</td>
<td>Existing Conditions: Neighbouring amenities</td>
<td>No services in close proximity</td>
<td>Close to one or two services</td>
<td>Close to a local centre with a reasonable range and quantity of services</td>
</tr>
<tr>
<td>Environment Quality for Current Use</td>
<td>Existing Conditions: Quality of environment for current use</td>
<td>Very poor</td>
<td>Average</td>
<td>Good</td>
</tr>
</tbody>
</table>

i.e. The quality of the streets and the public realm within and surrounding the business cluster are of low quality. Nothing in the local environment seems

Very Good

i.e. The quality of the streets and the public realm within and surrounding the business cluster are of very good quality (no potholes, no litter, no
3.13 The approach to the site assessment seeks to establish the current conditions of the employment sites in terms of quality of stock, amenity provision, accessibility etc. as observed at the time of survey. However, we recognise that within a borough as dynamic a number of factors are subject to change as new investment is brought to the area. Where possible these changes are taken into account within the survey forms and site assessments in terms of how they influence the future opportunities and potential of the sites.

3.14 Assessments of sites are undertaken in light the context of the nature of activity undertaken within the site at the time of survey, as such they assess amenity, stock and infrastructure provision against the likely expectations and requirements of particular activities. This allows

<table>
<thead>
<tr>
<th>Neighbouring Uses</th>
<th>Neighbouring uses</th>
<th>Mix of red and green, or: Airport, Rail, Higher Education &amp; Further Education</th>
<th>Road, Industrial, Office &amp; Warehousing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evidence of Pollutants</td>
<td>Evidence of pollutants</td>
<td>3 or more of the following: Noise, traffic, 24 hour operation, air, lighting</td>
<td>None evident</td>
</tr>
<tr>
<td>Physical Opportunity for Intensification</td>
<td>Development Context: Opportunity for intensification</td>
<td>Yes or No</td>
<td></td>
</tr>
<tr>
<td>Vacant Land</td>
<td>Development Context: Vacant Land</td>
<td>Yes or No</td>
<td></td>
</tr>
<tr>
<td>Vacant Buildings</td>
<td>Development Context: Vacant buildings (re-use and refurb)</td>
<td>Yes or No</td>
<td></td>
</tr>
<tr>
<td>Adequate Access &amp; Parking</td>
<td>Existing Conditions: Access &amp; Parking</td>
<td>Not adequate for the majority of the 5 aspects</td>
<td>Potential issues with adequacy, but not to the extent of the red categorisation</td>
</tr>
<tr>
<td>Internal Circulation</td>
<td>Existing Conditions: Access &amp; Parking</td>
<td>Poor</td>
<td>Average</td>
</tr>
</tbody>
</table>
account to be taken of the different needs of different occupiers in office, industrial and warehouse premises. This enables the identification of sites that are suitable for different types of uses today, with the consideration of planned investments and improvements informing the recommendations regarding future suitability.

3.15 The traffic light categorisations for each site helped to assess their overall quality and identify the overall nature and characteristics of the five sub-markets; Cluster 1 - Chingford & Highams Park, Cluster 2 - North Circular Corridor, Cluster 3 - Walthamstow & Wood Street, Cluster 4 - Lee Valley OA, Cluster 5 - Leyton & Leytonstone. This categorisation has also been used to form the recommendations on future action for the employment sites.

3.16 It is important to note that in some cases the traffic light categorisations reflect the appropriateness and quality of sites for employment use ‘on paper’, but do not consider this in conjunction with their support and provision for current uses. Although a site may not be very ‘green’ in the traffic light categorisation within the matrix, and may not be appropriate for employment uses should the current occupier(s) leave, or seem like the most desirable employment site in terms of quality, it may accommodate a locally important business within the Borough, or may provide the only appropriate site in the Borough for certain uses. It would therefore demonstrate its value as an employment site despite not ranking well in all criteria within the Site Assessment Matrix, and could be assigned with protection and employment maintenance for the future.

3.17 Similarly, not all occupiers require grade A space. In fact certain occupiers, such as certain bad neighbour uses including car repairs, waste transfer and disposal sites etc., are more suited to lesser grade space, and would seek to occupy this rather than grade A space.

3.18 The ‘Adequate Access & Parking’ criteria, is assessed both in terms of wider accessibility to the site (considering closest trunk road, rail access, bus routes and its location in the context of strategic routes within the Borough) and its immediate accessibility (considering the entrance and exit appropriateness

**Advising on Future Action**

3.19 To consider the future role of sites, the active employment sites within each sub-market cluster are assigned one of three future advice categories, which are explained as follows.

**Protect and Maintain**

3.20 This applies to sites which are suitable in their current form and should therefore be protected. They will require some investment in stock and public realm from a range of actors (including landowners, occupiers and the public sector) to maintain their condition and quality, but should not require any significant investment or intervention.
Protect and Enhance

3.21 This applies to sites which are largely suitable in their current form, and in the short term, however require some level of investment from a range of actors (including landowners, occupiers and the public sector) in order to address stock quality issues and undertake refurbishment where necessary. Such improvements should have the medium to long term impact of reducing the level of vacancy evident on many of these sites and targeting redundant and under-utilised units to improve the intensity of employment activity.

Monitor and Manage

3.22 This applies to sites which are of poor quality and are not currently functioning adequately as employment sites, based particularly on poor stock condition / quality, high levels of vacancy and under-utilisation and poor accessibility and amenity levels. The future employment role of these sites should be reviewed and a decision taken as to whether they should continue functioning as employment sites or be considered for other uses.

3.23 In some cases the development of new types of employment space on these sites, which is currently lacking with the Borough’s employment site portfolio, may transform their employment role and function and therefore justify its continuation.

3.24 Where sites are not specifically allocated for employment purposes and they currently make a poor offer to the market it is likely that the market will seek to bring these forward for non-employment uses. It may be possible, in line with the approach to some designated sites, to seek a mixed use development that retains some employment capacity, however it is likely that some will be lost entirely to the employment portfolio. Even if these sites are ‘lost’ such a loss of undesignated sites is unlikely to materially harm the economic prospects of the borough.

Borough Wide Characteristics

3.25 Before considering the employment site characteristics of the supply in each of the Borough’s sub-market areas, the key Borough wide characteristics of Waltham Forest’s employment land supply are identified.

Lack of choice

3.26 The Borough has a large amount of small to medium sized light industrial stock, however much of this is rather dated and there is very limited provision of new stock of this type. This provision suits the historic nature of the Waltham Forest economy, and the need for this space is reflected in the high levels of occupancy within most estates. However, the portfolio within the borough is narrow and there are few purpose-built, modern office and studio spaces provided within the borough’s employment sites or the town centres, limiting the opportunity
for Waltham Forest to attract new types of business activity. It is also noticeable that there is
very little purpose built and operated space for SMEs, again this relates to office and studio
space but also small workshops - although these tend to be provided for through other stock
such as railway arches and general industrial units.

Legacy of larger units

3.27 Much of the stock within the Borough is dated, as already indicated, and this dated stock
tends to be in the form of larger units which have now become partially or wholly redundant
and therefore underutilised. Examples include large former industrial buildings that are now
used for document storage, meaning large volumes of floorspace generate few jobs.

3.28 Some units could be re-used, however the investment required to refurbish and provide
appropriate accommodation for modern business requirements is likely to be considered
uneconomic when balanced against alternative uses that could be achieved through the
Prior Approval legislation. Many of the building types that lend themselves to conversion and
subdivision are also attractive for residential re-use. This is already evident within the borough
with a number of potentially suitable buildings being subject to Prior Approval Notifications

Figure 2 - Examples of Buildings Offering Shared Workspace Potential

3.29 The images in Figure 2 highlight some of the buildings within the borough that could be (or
are) sub-divided to provide small workspaces. Despite the presence of a number of buildings
that could offer this opportunity most stock is unlikely to be fit for purpose as it is not designed
with the appropriate flexibility to be easily sub-divided, which would allow the space to be
adapted to become suitable for modern occupiers.
**Pockets of poorer quality**

3.30 The poor quality stock observed within the Borough is not concentrated in one location or industrial estate, instead it is located in pockets mixed within employment sites. This tends to reflect the fragmented ownership within sites, which results in a disjointed approach to stock and site maintenance. Whilst this pepper-potting of lower quality stock avoids whole estates becoming ‘redundant’ it does still have negative impacts on the appearance and perception of the locations within which it lies. These negative impacts affect the value of stock across the whole estate and therefore the incentive for landowners to invest, this also has implications for the estate in terms of attracting higher quality (and hence higher value) employment activities.

**Successful new development**

3.31 New employment development within Waltham Forest appears to be very successful, resulting in high occupancy levels and higher rent achievement. Where new light industrial stock has been developed it has attracted new occupiers, in part this has been driven by relocations from further south in the Lee Valley, reinforcing the growing economic role of the borough. For example the development of new light industrial units at the Leyton Industrial Village has been highly successful with limited vacancy and high achieved rents. Similarly larger units along Orient Way have also been successful.

3.32 There are opportunities for further new development or redevelopment which could help to diversify the portfolio, this would be beneficial in continuing to support the growth of the local economy. One risk to redevelopment will be that any new development and redevelopment may increase rents and mean some existing or potential businesses cannot afford to locate within the borough. However, given the range and scale of employment provision this risk is likely to be low.

**Residential pressures on employment land**

3.33 As a result of London wide population and household growth, there is an increasing pressure on industrial land for new residential development, which is being felt particularly in Waltham Forest considering its requirement to contribute to the 20,100 new homes target to 2031 for the Upper Lee Valley Opportunity Area. The Council itself has identified a housing delivery target of 12,000 homes within the borough by 2020.

3.34 This residential pressure is already evident in a number of new (completed and progressing) residential developments in the Borough, many of which are located on former employment land. The on-going demand and need for new housing will continue to put pressure on employment land, particularly where it is closely aligned to public transport infrastructure.
3.35 As discussed later in this report harnessing this value uplift to deliver new, mixed use development that secures upgraded and new forms of employment floorspace offers a potential avenue for enhancing the workspace portfolio, particularly where residential activity can cross-subsidise delivery.

Sub-Market Analysis

3.36 Having identified the key borough wide characteristics of employment land supply in Waltham Forest, along with the earlier property market analysis, some key distinctions become evident based on the geographic clustering and associated commercial activity of sites. Whilst there are clearly differences between each site and similarities between sites located in very different parts of the Borough, within each sub-market cluster sites often share broadly consistent trends across a range of characteristics, as identified in Table 15.

3.37 The five areas, which have similar accessibility, stock character and scale, and employment uses are as follows:

- **Cluster 1 - Chingford & Highams Park**: This cluster, which captures the Chingford Hatch and Highams Park settlement areas, is small in the sense that it contains only three active employment sites; Larkshall Business Centre, Highams Park Industrial Estate and Jubilee Avenue.

- **Cluster 2 - North Circular Corridor**: This cluster captures the employment sites which sit alongside the North Circular (A406) and therefore benefit from good strategic accessibility. Employment sites within this cluster include the Hall Lane and North Circular Road SIL designations, Avenue Way, Cabinet Way and Waltham Park Way sites.

- **Cluster 3 - Walthamstow & Wood Street**: This cluster corresponds with the urban area which incorporates Walthamstow Town Centre, including Clifford Road, Barret Road (The Old Station Yard), Skeltons Lane and Ravenswood Industrial Estate employment sites.

- **Cluster 4 - Lee Valley OA**: This cluster encapsulates an area of large scale employment sites, many of which are designated as SIL, which benefits from the influence of the Upper Lee Valley OAPF. Employment sites within this cluster include the Blackhorse Lane, Argall Avenue, Rigg Approach, Lammas Road and Former Town Gas Works SIL sites.

- **Cluster 5 - Leyton & Leytonstone**: This cluster contains the urban areas of Leyton and Leytonstone, including a number of small scale employment sites, many of which contain railway arch units. Employment sites within this cluster include; The Sidings Industrial Estate, Joseph Ray Road, Lancaster Road Arches, Howard Road and Montague Road / Courtnay Road Arches.

3.38 An indicative indication of these five cluster areas is shown below in Figure 3.
### Table 15 - Predominant characteristics of sub-market area clusters

<table>
<thead>
<tr>
<th>Cluster</th>
<th>Accessibility</th>
<th>Scale, character &amp; stock</th>
<th>Predominant employment use types</th>
<th>Other characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chingford &amp; Highams Park</td>
<td>Generally good (proximity to North Circular for sites in south)</td>
<td>Fairly large scale sites</td>
<td>Predominantly B1 and B2 uses</td>
<td>Very few sites clustered here – “gap” in provision Poor location character</td>
</tr>
<tr>
<td>North Circular Corridor</td>
<td>Very good, particular in terms of strategic access to road network (North Circular)</td>
<td>Fairly large scale sites</td>
<td>Mixed B and sui generis (retail trade counter)</td>
<td>Large proportion of trade counter uses – taking advantage of road links</td>
</tr>
<tr>
<td>Walthamstow &amp; Wood Street</td>
<td>Mixed – not strategically well located but benefit from good public transport</td>
<td>Mixed</td>
<td>Mixed (particularly including B2)</td>
<td>Contains 2 sites below the 0.25ha threshold alongside standalone properties in the Walthamstow Town Centre</td>
</tr>
<tr>
<td>Lee Valley OA</td>
<td>Mixed - strongest for sites clustered at North (North Circular proximity) and south (A12 proximity)</td>
<td>Mixed scale, but with a number of the largest SIL and Borough Employment Area sites in Borough</td>
<td>Mixed B1c / B2 / B8</td>
<td>Contains majority of Borough’s SIL sites</td>
</tr>
<tr>
<td>Leyton &amp; Leytonstone</td>
<td>Generally poor (direct and strategic)</td>
<td>Small scale with local occupiers. Large proportion of rail arch units, often poor quality, although some have been recently refurbished</td>
<td>Large presence of vehicle repair and garage related uses (in rail arch units) – B2</td>
<td>Contains majority of Borough’s rail arch units Poor location character</td>
</tr>
</tbody>
</table>

3.39 These are generalised characteristics, so there may be exceptions to them in some cases, however they provide a useful overall indication of distinctions and similarities between different clusters.

3.40 The benefit of assessing the employment sites within the context of these clusters is in the ability it provides to identify common influences on sites and their occupiers, for example; locational challenges, the impact of accessibility and similarities in stock character or occupier nature. This is useful in understanding the potential future role of employment sites within different parts of the Borough.
Figure 3 - Indicative Indication of Sub-Market Clusters
Cluster 1 - Chingford & Highams Park

3.41 Three active employment sites have been identified within the Chingford & Highams Park Cluster, as shown below in Table 16. The total area for these sites is 10.24ha of employment land.

Table 16 - Cluster 1 Active Employment Sites

<table>
<thead>
<tr>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Site Status</th>
<th>Predominant Stock Quality</th>
<th>Overall Quality Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>GVA 1</td>
<td>Larkshall Business Centre</td>
<td>0.37</td>
<td>Additional Employment Site</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>BEA13 (33)</td>
<td>Highams Park Industrial Estate</td>
<td>5.65</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1331079 (33A)</td>
<td>Former C&amp;A Warehouse</td>
<td>4.22</td>
<td>Employment land with planning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3.42 All stock within this cluster has been purpose built for employment uses. The stock type consists largely of light industrial and warehouse units, however, there is also new non B class development within the Former C&A Warehouse site in the form of a new Tesco store with residential units above and behind.

3.43 Overall stock quality for the cluster is mixed. This is predominantly driven by the nature of some units at the Larkshall Business Centre which are of poorer quality, albeit with some better quality units to the north. The other two sites within the cluster are good. This is particularly the case for the new light industrial / warehouse / office development on the Former C&A Warehouse site.
Office provision in this Cluster is focussed at the southern end of Larkshall Road and within Chingford town centre. The stock within the Larkshall Road area provides a base for a number of small professional service firms and there is little noted vacancy, however the stock is dated and of relatively low quality.

Stock within Chingford is largely clustered along Station Road and is a mix of dated, purpose built office premises and older conversions, Doric House (a purpose built block dating from the late 1960s) provides the single largest offer at c.600sqm. Regardless of the stock type it predominantly is of lower quality, albeit some of the conversion properties appear to be in better condition and continuing to meet a local need.

There is some mix in the use types within this cluster. The predominant types of uses on the sites falls into the B2 use class, however Highams Park Industrial Estate also contains some B1c and B8 uses. Along with the new Tesco retail store development and accompanying residential units, the Former C&A Warehouse site has some B1 and B2 uses, and will have further B1 and B2 uses delivered as part of the 71,000sqft employment element of the Highams Green development, providing new industrial / office and high tech space. There are other non B class uses evident at Highams Park Industrial Estate in the form of a Health and Fitness Club / Gym and some trade counter use (Magnet Trade).

The Highams Park Industrial Estate and Former C&A Warehouse sites are of good overall quality, considering all of the characteristics across the site assessment matrix. Larkshall Business Centre is ranked as poor quality, based particularly on its poor location character, neighbouring uses, adequate access and parking and internal circulation.

Similarly, site accessibility is good for the Highams Park Industrial Estate and Former C&A Warehouse sites, but is poor for Larkshall Business Centre, particularly in terms of direct access to the site. This is divided across two entrances directly off the B160 each of which can only access part of the site due to there being no internal through route which links the north and south of the site. Manoeuvrability off the road and into the sites is made difficult by the small internal yard space accompanying units and inadequate internal circulation, which would make accessibility particularly challenging for larger vehicles.

Based on site assessments there is some evidence of vacancy within this cluster, however this is not of a particularly significant scale, with the exception of the Former C&A Warehouse site where large parts of the site are currently under construction and where some of the newly developed units have not yet been occupied and are currently being advertised to let (some of which are occupied by businesses such as International Lift Equipment). There are some vacant units at Highams Park Industrial Estate which are currently being advertised to let.
3.50 The opportunity for intensification is limited, considering the intensive and constrained nature of the Larkshall Business Centre site, and the intensification underway as part of the new development on the Former C&A Warehouse site.

3.51 Analysis of the employment sites within the Chingford & Highams Park Cluster has led to the following site specific advice, as shown below in Table 17.

Table 17 - Advice on Future Action for Cluster 1 Employment Sites

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Future Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Larkshall Business Centre</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Highams Park Industrial Estate</td>
<td>Protect and Enhance</td>
</tr>
<tr>
<td>Former C&amp;A Warehouse</td>
<td>Protect and Maintain</td>
</tr>
</tbody>
</table>

3.52 Both the Highams Park Industrial Estate and the former C&A Warehouse have benefitted (or will benefit) from investment in stock and redevelopment to provide new purpose built and good quality employment stock and therefore provide an improving offer to the market. Whilst some units remain vacant this is likely to relate more to their location, which is somewhat remote from the borough’s core economic hubs, than their suitability as employment sites. Given the strengthening of the economy we would expect both sites to be attractive to the market and should be protected.

3.53 The Larkshall Business Centre is more challenged. The stock quality overall is mixed (albeit with some newer, better quality units) and wider access and servicing is weak, its location within a largely residential area limits its attractiveness to occupiers. However, vacancy is low and it clearly meets the needs of some businesses, particularly those servicing the local area, with some retail/trade counter presence. At this point in time the site should continue to be protected as an employment location, however over the plan period it should be monitored and redevelopment supported if units become vacant and fail to attract new occupiers.

Cluster 2 - North Circular Corridor

3.54 Five active employment sites have been identified within the North Circular Corridor Cluster, as shown below in Table 18. The total area for these sites is 14.16ha of employment land.
### Table 18 - Cluster 2 Active Employment Sites

<table>
<thead>
<tr>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Site Status</th>
<th>Predominant Stock Quality</th>
<th>Overall Quality Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIL 1</td>
<td>Hall Lane</td>
<td>1.84</td>
<td>SIL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIL 2</td>
<td>North Circular Road</td>
<td>4.05</td>
<td>SIL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA12</td>
<td>Justin Road/Trinity Way - Avenue Business Park &amp; Trinity Park</td>
<td>3.20</td>
<td>Borough Employment Area</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>BEA16</td>
<td>Cabinet Way - Deacon Trading Estate</td>
<td>2.16</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA11</td>
<td>Waltham Park Way</td>
<td>2.91</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Figure 5 - North Circular Corridor Cluster Sites

All employment stock within this cluster has been purpose built for employment uses, however there is variation in the types of stock within the cluster. There is a predominance of large scale light industrial / warehouse type units, however many of these units are occupied by sui
generis rather than B class uses, with trade counter / retail activity. The other major stock type
evident within the cluster is the more modern office park style office units at Trinity Park.

3.56 Stock quality is good across the cluster, although the quality is slightly weaker for the light
industrial / trade counter units at Waltham Park Way, or for some of the light industrial /
warehouse units at Justin Road, which forms part of the BEA12 site along with the Trinity Park
office element.

3.57 As suggested above, the cluster contains a mix of employment uses, both B class and non-B
class. The B class employment uses are mixed across the B1c, B2 and B8 use categories. There
is significant sui generis / non B class activity largely in the form of trade counter uses, evident
at the North Circular Road site, Deacon Trading Estate and Waltham Park Way. B class
occupiers within the cluster include Matthews Printing, County Construction (both at the Hall
Lane site). Non – B class occupiers within the cluster include Safestore, Costco, Tool Station,
Carpet Works, Topps Tiles, Screwfix, Vauxhall and Dagenham Motors (across the other four
sites).

3.58 Many occupiers on sites within the cluster have a regional / national presence, which is likely
to reflect its strong strategic accessibility as a result of its proximity and direct accessibility to
the North Circular, and to a lesser extent the SIL designation status of some sites.

3.59 Overall quality within the North Circular Corridor cluster, considering all of the characteristics
across the site assessment matrix is good, and is contributed to significantly by good location
character, strategic accessibility, parking, internal circulation and building quality and building
age of the cluster’s sites.

3.60 Accessibility is a particular strength for the sites within this cluster. In strategic terms the
majority of sites benefit from their proximity and direct accessibility to the North Circular, as
well as from the fact that their location is close to a significant cluster of other industrial /
employment uses. Direct accessibility is also good for the majority of sites, with clear site
access which accommodates the movement of all vehicle sizes into and out of the site.

3.61 Based on the site assessments there is no evidence of significant vacancy within this cluster,
however there are some office units advertised to let at Trinity Park (four business / office units).
Similarly, there is no significant scope for physical intensification within the cluster.

3.62 Analysis of the employment sites within the North Circular Corridor Cluster has led to the
following site specific advice, as shown below in Table 19.
Table 19 - Advice on Future Action for Cluster 2 Employment Sites

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Future Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hall Lane</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>North Circular Road</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Justin Road / Trinity Way – Avenue Business Park &amp; Trinity Park</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Cabinet Way – Deacon Trading Estate</td>
<td>See notes below. Potential to Protect and Enhance towards B class uses.</td>
</tr>
<tr>
<td>Waltham Park Way</td>
<td>See notes below. Potential to Protect and Enhance towards B class uses.</td>
</tr>
</tbody>
</table>

3.63 Recommendations within this cluster fall into two clear categories.

3.64 Firstly, relating to those sites which are protected as B class employment sites but currently accommodate wholly non-B class activities. Both the Cabinet Way and Waltham Park Way sites are used for trade counter, retail (including car sales) and self-storage activity – whilst each of these are employment generating they do contribute to the accommodation of the requirements identified by the employment forecasts set out above.

3.65 In recent years the value of ‘big box’ retail and self-storage activities have increased significantly, with retail in particular representing one of the highest value uses in the market. As such it is difficult to see at this point in time an investor or developer seeking to replace these uses with B class activity. However, in the long term as the retail sector in particular continues to evolve, there may be opportunities to reconfigure these sites.

3.66 The Council therefore has a choice, it can remove these sites from the employment portfolio to reflect their ‘alternate’ use, providing an alternate designation that formalises in policy their nature and role. There are clear risks to this approach, firstly as de-designation would result in the permanent loss in any capacity and, secondly, it could encourage greater levels of out of town retail/leisure activity potentially harming strategies for the boroughs town centres.

3.67 Or, given their strategic accessibility is likely to be a key attractor for businesses, it can continue to consider the sites for employment and seek to encourage, through future redevelopment, an increase in B class activity. The area will potentially be attractive a range of larger B8 activities which rely heavily on access to the trunk road network.

3.68 The latter option has risks as there is no guarantee any redevelopment will take place, however it would offer opportunities to accommodate future forecast growth without the need to identify additional land.
The second set of sites Hall Lane, North Circular Road and Justin Road/Trinity Way are more straightforward given they continue to play an important role within the employment portfolio and, in the case of Trinity Way, provide some of the borough’s only purpose built, modern, office stock. These sites should be protected as employment sites throughout the plan period.

Given the strategic accessibility of this cluster it may provide an attractive location to meet some of the identified needs for warehousing and distribution activity. Whilst it may not be as strong an offer as nearby sites to the west of the Lee Valley for major logistics users given the greater presence of residential communities. However given the opportunity to connect to the A406 sites are likely to be attractive if additional capacity can be identified, potentially through sites such as Chingford Island, shown below in Figure 6, which are considered to be performing poorly in terms of greenbelt assessment.

Figure 6 - Chingford Island Location

Cluster 3 - Walthamstow & Wood Street

Four active employment sites have been identified within the Walthamstow & Wood Street Cluster, as shown below in Table 20. The total area for these sites is 4.39ha of employment land.
Table 20 - Cluster 3 Active Employment Sites

<table>
<thead>
<tr>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Site Status</th>
<th>Predominant Stock Quality</th>
<th>Overall Quality Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEA10 (27)</td>
<td>Clifford Road</td>
<td>2.57</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA22 (39)</td>
<td>Barret Rd (The Old Station Yard - Wood Street)</td>
<td>0.54</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Skeltons Lane - Wood Street (inc. former Dairy Site)</td>
<td>0.81</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Ravenswood Industrial Estate</td>
<td>0.47</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 7 - Walthamstow and Wood Street Cluster Sites

3.72 Outside of these sites the employment offer of Walthamstow town centre has also been considered and is discussed at the end of this section.
3.73 All stock types for the active employment sites within this cluster are purpose built for employment uses. Whilst there is some variation in stock types across the different sites within the cluster, the majority are small to medium sized light industrial warehouse units.

3.74 The stock quality within the cluster varies across different sites. The Clifford Road and Barret Road sites both exemplify good quality units, however at Barret Road the majority of these units accommodate non B class uses; namely a garden centre and trade counter uses, alongside residential development which occupies the southern part of the site.

3.75 The relatively modern, good quality light industrial units at Walthamstow Business Centre on part of the Clifford Road site (the other part of which is being developed with residential units) accommodate a range of occupier uses which are predominantly B1b / B1c / B2 uses.

3.76 Two larger standalone office buildings are located along Fulbourne Road/Forest Road, 2BFulbourne Road (c. 700sqm) is occupied by an accountancy business, whilst 869 Forest Road is occupied by LB Waltham Forest.

3.77 The stock at Ravenswood Industrial Estate is considered to be poor based on its dated nature and limited evidence of refurbishment, however it continues to meet a range of needs including car repairs/MOTs. More recently the site has seen the introduction of a micro-brewery and Gin Factory, bringing new activity to the site.

3.78 At Skeltons Lane the stock quality is slightly better, but is not considered to be good, with a substantial amount of open storage evident on site. Opposite the Skelton’s Lane site is the Dairy site, which is of low quality and unlikely to meet future business requirements in its current form if it’s current function ceases. However it may provide an opportunity to provide new floorspace as part of a mixed use redevelopment.

3.79 The occupiers on sites in this cluster tend to be local in nature, however there is also evidence of regional nature occupiers at Barret Road. The micro-brewery and Gin distillery within Ravenswood are likely to have a larger draw in terms of bringing new visitors to the site from across a wider area.

3.80 The majority of sites in this cluster are considered to be of average overall quality, considering all of the characteristics across the site assessment matrix. However, the overall quality of the Ravenswood Industrial Estate specifically is poor, albeit continuing to meet a range of business needs.

3.81 Accessibility varies within the cluster, both strategically and in terms of direct site access. Clifford Road has the strongest strategic access within the cluster, based on its closer proximity to the North Circular along Fulboume Road, however there are some direct site access issues where access for large vehicles is challenging.
3.82 Strategically, whilst they are not as advantageously located, Barret Road, Skeltons Lane and Ravenswood Industrial Estate have good direct site access, which is not restrictive for larger vehicles. However, this does require access off Wood Street and Shemhall Street respectively, which can be difficult at peak times due to congestion.

3.83 Based on site assessments there is no evidence of significant vacancy within this cluster. However, there are a small number of vacant units evident at Clifford Road and Skeltons Lane. Potential for physical intensification within the cluster is very limited, with only Skeltons Lane/Dairy site demonstrating any potential for this, considering the large proportion of open storage on site.

3.84 Additional capacity could be created through the re-use of the Travis Perkins site within Barret Road, shown below in Figure 8 the parallel retail study suggests this site may not be required for retail activity in the future, suggesting there is an opportunity to bring new B class activity forward.

Figure 8 - Travis Perkins Site Location

3.85 Analysis of the employment sites within the Walthamstow & Wood Street Cluster has led to the following site specific advice, as shown below in

Table 21 - Advice on Future Action for Cluster 3 Employment Sites

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Future Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clifford Road</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Barret Rd (The Old Station Yard - Wood Street)</td>
<td>Protect &amp; Enhance – largely non B class employment</td>
</tr>
<tr>
<td>Skeltons Lane – Wood Street</td>
<td>Protect and Enhance – albeit the Dairy site likely to require redevelopment and could provide a location for a new mixed use development</td>
</tr>
<tr>
<td>Ravenswood Industrial Estate</td>
<td>Protect and Enhance</td>
</tr>
</tbody>
</table>
3.86 All of the sites within this cluster offer opportunities to continue to provide employment and servicing opportunities for the rapidly changing centres of Walthamstow and Wood Street. It is clear that all sites would benefit from investment in their stock in order to ensure they continue to play an active role in the market. This investment should entail enhancements to the quality of stock and their relationship to surrounding areas (public realm), this would be achieved through private (landowner) investment in the site and public sector investment in the wider streetscape.

3.87 The sites at Wood Street have particular medium term potential to make a much more significant contribution to the economy and the opportunity to deliver new forms of workspace to support a diversification of local economic activity. This will be driven by the evolution of Wood Street as retail and residential centre, supported but the enhanced connections through the Overground service.

3.88 Within the Wood Street area rapidly rising values and demand for new residential development are likely to place employment sites under considerable pressure. However they do offer the opportunity to deliver a different type and better quality of workspace within mixed use sites, and this should be a pre-requisite of any redevelopment. Other locations in London have been able to demonstrate that the redevelopment of old industrial sites can secure a replacement of commercial floorspace quantum on the back of development of new residential units.

3.89 Developments such as those delivered by the Workspace Group (including Bow Trading Estate, Faircharm Deptford, the Light bulb, Wandsworth) have all secured significant levels of enhanced workspace through such an approach. These have improved the ‘fit’ of the workspace offer with local needs and also increased the employment capacity of sites by delivering a different type of more efficient space. The reprovision of the existing floorspace quantum and employment capacity should therefore be the starting point for considering the future of sites at Wood Street.

3.90 Sites in this cluster should be protected through planning policy, with the opportunities at Wood Street proactively promoted to encourage the delivery of new B class space.

**Walthamstow Town Centre**

3.91 Walthamstow is the largest town centre within the borough and, like most large town centres in London, has traditionally accommodated a range of B class employment activities, most notably within office floorspace. The core B class floorspace employment activity is driven by the Council, with a range of ‘offices’ across the town including the Town Hall and Sycamore House on Forest Road, a housing office within the Central Parade and further accommodation at Juniper House, both on Hoe Street. None of these sites are designated as
employment land within the Local Plan given the mixed nature of local authority activity and their sole use for public administration functions.

3.92 However, as noted above, within the town centre there are two designated Borough Employment Areas (Hatherley Mews and the East London Office Centre). Given their sizes these BEAs sit below the threshold recommended by the NPPG for individual site assessment, however this should not be allowed to underplay their importance to the borough, in particular when taken as part of the wider mix of B Class space within the town centre. Indeed, in understanding the opportunities and functions of the town centre these BEAs alongside other B Class buildings such as that currently occupied by Strettons, other stock at Church Hill and The Clockworks (Forest Road) need to be considered together as they underline the importance of continuing to provide B class space within Walthamstow.

3.93 Given the lack of office floorspace within the borough properties within Walthamstow have formed the major cluster of capacity for a range of professional and business service activities despite being of mixed quality. There is a lack of good quality modern stock which is geared towards meeting the needs of small businesses, with the majority of the offer dated in either c.1970’s era purpose built buildings (such as Quant House) or conversion of older premises (such as 21-23 Church Hill).

3.94 Despite this lack of modern stock there are some properties that do provide an important offer. The East London Office Centre, whilst an older building, does provide reasonable quality units available on flexible “all inclusive” terms which are likely to be attractive to a range of small businesses. The Stretton’s building on Hoe Street also provides good quality accommodation for a single occupier.

3.95 The refurbishment of properties along Hatherley Mews, promoted as “The Tramworks”, has provided a new cluster of small office and studio spaces targeted at a range of creative businesses. The redevelopment of the two storey Mews workshop premises also provides residential accommodation and a cafe. Hatherley Mews provides a key offer in supporting the diversification and evolution of the Waltham Forest economy, providing the size, type and nature of property and environment that attracts a broad range of small business activity. Similarly the Clockworks provides a mix of workshop and studio space in an attractive, period building that can attract a similar scale and nature of business.

3.96 Whilst the quality of stock is mixed across the town centre the clustering of core activity around the High Street – Hoe Street crossroads provides excellent levels of accessibility via train, underground and bus at Walthamstow Central. It also offers a wide range of retail and leisure amenity services from which businesses can benefit, adding to the potential attractors for new occupiers.
3.97 However, it is these strengths that are also challenging the on-going provision of B class employment space within the town centre, particularly as demand for housing (and hence values) increase. This pressure is already being experienced at Church Hill, where Quant House is undergoing redevelopment to provide new flats, and also within Hatherley Mews where a number of units are subject to Prior Approval Notifications. Whilst it is too late to retain Quant House the loss of further capacity should be resisted where possible, in particular this should focus on protecting stock suitable for Waltham Forest’s new generation of businesses such as Hatherley Mews.

Cluster 4 –Lee Valley OA

3.98 Nineteen active employment sites are identified within the Upper Lee Valley Opportunity Area Cluster, as shown below in Table 22. The total area for these sites equates to 105.83ha of employment land. The Essex Wharf site (site reference 1331066) is excluded from consideration within this cluster as the majority of the site falls outside the Borough boundary.

3.99 In relation to this employment land total it is important to note that there is a partial crossover of land between the Alpha Business Centre & Car Park and the Brunner Road sites, which results in some very minor double-counting and therefore, a potentially higher employment land area than is completely accurate.

3.100 It is worth noting that the employment land position in this cluster is complex, with many of the identified sites already coming forward for development of largely residential orientated development. In a large number of areas this is re-using sites that were already vacant or largely unused, reducing the displacement impact on businesses.

3.101 Whilst these sites have, for completeness, been surveyed as part of the current portfolio and the findings presented here, the future recommendations take into account the likely role they will play based on the current understanding of future development proposals.
### Table 22 - Cluster 4 Active Employment Sites

<table>
<thead>
<tr>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Site Status</th>
<th>Predominant Stock Quality</th>
<th>Overall Quality Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>SIL 3</td>
<td>Blackhorse Lane</td>
<td>16.07</td>
<td>SIL</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>1331074</td>
<td>Ferry Lane Industrial Estate/Station Hub</td>
<td>5.94</td>
<td>Employment land with planning</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>BEA9 (1331187, 24, 24A 1331199 &amp; 1331212)</td>
<td>Sutherland Road</td>
<td>5.70</td>
<td>Borough Employment Area</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>1331014</td>
<td>Alpha Business Centre &amp; Car Park (WTC Site 15)</td>
<td>1.56</td>
<td>Employment land with planning</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Brunner Road</td>
<td>1.74</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA8</td>
<td>Argall Avenue Extension</td>
<td>2.50</td>
<td>Borough Employment Area</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>SIL 4 (20B, 20C &amp; 20D)</td>
<td>Argall Avenue</td>
<td>26.81</td>
<td>SIL</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>SIL 5 (19)</td>
<td>Rigg Approach</td>
<td>5.04</td>
<td>SIL</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>BEA7 (18)</td>
<td>Heybridge Way</td>
<td>2.11</td>
<td>Borough Employment Area</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>SIL 6</td>
<td>Lammas Road</td>
<td>1.95</td>
<td>SIL</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>SIL 7 (same as 15)</td>
<td>Former Town Gas Works</td>
<td>3.35</td>
<td>SIL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Lea Bridge Gas Works</td>
<td>2.50</td>
<td>LBW Clusters</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>17</td>
<td>Church Road (Lea Park Trading Estate)</td>
<td>0.96</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA6 (13)</td>
<td>Church Road</td>
<td>5.34</td>
<td>Borough Employment Area</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>BEA5 (12)</td>
<td>Orient Industrial Park &amp; Leyton Business Centre</td>
<td>2.14</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Shaftesbury Court</td>
<td>0.26</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA3 (5)</td>
<td>Auckland Road</td>
<td>5.14</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA2 (4)</td>
<td>Sherrin Road</td>
<td>11.86</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA15 (2)</td>
<td>Temple Mills Lane</td>
<td>2.69</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Figure 9 - Lee Valley OA Cluster Sites

SIL 3 Blackhorse Lane, Station Hub, BEA 9 Sutherland Road
23 Brunner Road & Alpha Business Centre
BEA 8 Argall Avenue Extension
SL 4 Argall Avenue
17 Church Rd, Lee Park Trading Estate
SL 5 Rigg Approach
SL 6 Lammas Road
SL 7 Former Town Gas Works
3.102 Six of the sites within this cluster (Blackhorse Lane, Ferry Land Industrial Estate / Station Hub, Sutherland Road, Alpha Business Centre & Car Park, Argall Avenue, and Argall Avenue Extension) contain some vacant units, the majority of which are advertised to let. The Church Road (Lea Park Trading Estate) does not have significant unit vacancy, but does have some vacant land within the site. Despite this cluster having more vacancy than is evident in other clusters, the vacancy levels are still fairly modest and vacancy is often rather piecemeal within sites, reflective of fragmented ownership, although this has some exceptions e.g. Alpha Business Centre and Car Park.

3.103 Given the large scale and mixed nature of these employment sites it is unsurprising that there are clear opportunities for redevelopment and potential intensification of activity to generate more jobs within them. A significant number of the large sites (for example Rigg Approach, Argall Avenue and Blackhorse Lane) contain considerable areas of open storage, builder/construction yards, plant hire and other low density uses which could be re-organised to create development parcels.

3.104 A number of sites also contain vacant buildings or land which offer the potential for physical intensification without displacing existing businesses, four sites within the cluster are considered to offer this opportunity: Ferry Lane Industrial Estate / Station Hub, Alpha Business Centre & Car Park, Auckland Road and Temple Mills Lane. Lying within the LLDC area the Temple Mills Lane
site is identified for transport related uses, however within the draft Waste Plans it is also identified as a potential waste site, as such the B Class opportunity may be limited.

3.105 The development potential of this area has been recognised within the market, with proposals coming forward for residential led mixed use development, providing an uplift in the quality and amenity offer in the area.

3.106 In order to consider further detail of employment site characteristics better for this cluster, which contains a large number of sites, the sites are divided into sub-clusters based on their overall site quality identification.

3.107 The following six sites within the cluster are ranked as having good overall quality; Blackhorse Lane (SIL3), Argall Avenue (SIL4), Argall Avenue Extension (BEA8), Former Town Gas Works (SIL7), Sherrin Road (BEA2) (4) and Temple Mills Lane (BEA15).

3.108 The following nine sites within the cluster are ranked as having average overall quality (albeit with some pockets of poorer quality stock); Ferry Lane Industrial Estate / Station Hub (1331074), Sutherland Road (BEA9), Alpha Business Centre & Car Park (1331014), Brunner Road (23), Rigg Approach (SIL5), Heybridge Way (BEA7), Lammas Road (SIL6), Church Road (BEA6) and Orient Industrial Park & Leyton Business Centre (BEA5).

3.109 The following three sites within the cluster are ranked as having poor overall quality; Church Road (Lea Park Trading Estate) (17), Shaftesbury Court (11) and Auckland Road (BEA3).

**Sites with good overall quality**

3.110 All stock types in the active employment sites with good overall quality in this cluster are purpose built for employment uses. There is variation in the stock type across the different sites within this sub-cluster, with the majority of sites including large warehouse / distribution units many of which are mixed with some smaller office, workshop and light industrial units. The age of stock is mixed across half of the sites (Blackhorse Lane, Argall Avenue, Argall Avenue Extension) however the Former Town Gas Works, Sherrin Road and Temple Mills Lane all have predominantly modern stock which has been delivered since 1990.

3.111 In terms of stock quality there is evidence of mixed quality nature in some sites; Blackhorse Lane, Argall Avenue and Argall Avenue Extension, however there is a tendency towards good quality amongst the mix at Argall Avenue Extension, and Argall Avenue has good quality pockets, such as the Argall Avenue and Argall Business Areas. There is predominantly good stock quality at Sherrin Road and Temple Mills Lane.

3.112 Occupiers on these sites tend to be local and regional in nature, however there is also some evidence of national occupiers at the Former Town Gas Works Site (e.g. FedEx) and Temple
Mills Lane (TfL). The types of uses on these sites range across the B1a, B1c, B2 and B8 spectrum, as expected based on the range of stock type evident. The three SIL sites (Blackhorse Lane, Argall Avenue and Former Town Gas Works) accommodate the majority of the larger storage and distribution uses.

3.113 Each of these six sites has good site access and accessibility, both in terms of direct site access and entrances and in terms of the more strategic connectivity of the sites. Blackhorse Lane has good proximity and access to the A503 Forest Road and more importantly the A406 North Circular, and the other sites had good proximity and access to the A12 which links to the A406 North Circular. In terms of direct site access, the site entrances and access routes are largely suitable for all vehicle sizes.

3.114 Argall Avenue has a more mixed level of access. Whilst the majority of the site is accessed directly from Argall Way itself (which itself has a direct access to the A104 Lea Bridge Road) two areas have less direct access. To the south east some units are only accessible via Burwell Road and Wellington Road, which are relatively small residential streets unsuitable for large goods vehicles. To the north east of the area some units are functionally separated from the main industrial estates by a restricted access road that prevents access between Argall Avenue and the Southern Access Road. This means activities in this location are accessed from the Southern Access Road, which in turn is accessed via residential streets.

Sites with average overall quality

3.115 Stock types in the active employment sites with average overall quality in this cluster are predominantly purpose built for employment uses. Again, there is variation in the stock type across the different sites within this sub-cluster. There are fairly large warehouse units on a number of sites (including Ferry Lane Industrial Estate, Rigg Approach and Lammas Road), as well as smaller light industrial and industrial units being part of the mix on a number of sites (including Brunner Road, Rigg Approach, Lammas Road and Orient Industrial Park and Leyton Business Centre). Some rail arch units are also found within the Lammas Road site.

3.116 Stock age is mixed throughout these nine average quality sites, particularly at Ferry Lane Industrial Estate, Brunner Road, Heybridge Way, Lammas Road and Sutherland Road. Rigg Approach also contains a mixed age of stock, however there is a tendency towards older stock. Stock at the Alpha Business Centre, Orient Industrial Park and Leyton Business Centre, and Church Road (with the notable exception of a refurbished building developed in 1898) is predominantly aged between 1970 and 89.

3.117 Stock quality within this sub-cluster is mixed within a number of sites including; Brunner Road, Heybridge Way, Lammas Road, Ferry Lane Industrial Estate (with some tendency towards poor quality), and Rigg Approach and Church Road (both with some tendency towards average
quality). Several sites (Sutherland Road and Orient Industrial Park and Leyton Business Centre) have predominantly average stock quality, and Alpha Business Centre and car park have predominantly poor quality stock.

3.118 Occupiers of these sites tend to be predominantly local in nature, with some evidence of regional occupier presence at Lammas Road, Heybridge Way, Church Road and Orient Industrial Park and Leyton Business Centre, and some evidence of national occupier presence at Heybridge Way.

3.119 The types of uses on these sites range across the B1a, B1c, B2 and B8 uses. The SIL site, Rigg Approach is very mixed in terms of its occupiers and uses, and the larger storage and distribution uses are found particularly on Ferry Lane Industrial Estate, Higham Lodge (within Sutherland Road), and Heybridge Way. Trade counter uses (such as RTS Roofing Supplies) are evident at Brunner Road and Heybridge Way, and the main locations for office use in this sub-cluster are at Church Road and Lammas Road.

3.120 The offer within Sutherland Road is particularly diverse. It is home to Blackhorse Workshop, a high profile shared workspace that is held up as an exemplar within London of how to provide affordable workspace for a range of small creative and manufacturing businesses. The area is coming forward for mixed use development, which is entirely compatible with the offer made by activities such as the Workshop. However it also accommodates less suitable activity including a meat processing plant which, whilst an important employer, does not complement the wider activities within (or planned for) the area.

3.121 There is generally good accessibility for many of these sites, particularly for Ferry Lane Industrial Estate, Alpha Business Centre and Car Park and Heybridge Way. However, access is particularly poor for Orient Industrial Park and Leyton Business Park, where the direct site access is very restricted, accessed from a small residential road where on street parking in the residential streets would cause significant issues for larger vehicles (despite a wide site entrance itself to allow for larger vehicles). Whilst strategically the site is close to the A12, it does not benefit from good direct access onto it.

3.122 There are potential accessibility issues for Sutherland Road (due to the residential nature of many of the of its site access routes), Lammas Road (with challenged direct site access) and Brunner Road which is constrained in terms of direct site access due to narrow roads and strategically given the site is located a substantial distance from both the A12 and the A406 North Circular.
Sites with poor overall quality

3.123 The Lea Bridge Gas Works site within this sub-cluster, shown below in Figure 10 is not considered in detail here given it is not currently in active use. Whilst the gas holders have been decommissioned they still occupy the site and there are no other employment generating uses in the site. Whilst it is not considered to contain active employment uses, it could offer good strategic accessibility, lying in close proximity to Orient Way (which joins with the A104 and A12). However, to come forward for development site access would have to be addressed with the current access via residential streets inadequate for more intensive large scale B class use of the site. However, it may be appropriate for a more mixed approach that integrates smaller business workspace into a larger residential scheme.

Figure 10 - Lea Bridge Gas Works Site Location

3.124 All stock types in the active employment sites with poor overall quality are purpose built for employment uses. There is variation in the stock type across the three active employment sites considered within this sub-cluster; Lea Park Trading Estate has relatively small light industrial units, Shaftesbury Court has slightly larger light industrial / warehouse units and Auckland Road is very different in its provision of large scale refuse and recycling centre specific units in addition to a large proportion of open storage and space for vehicle movements etc.

3.125 Stock age across this sub-cluster is dated; Lea Park Trading Estate and Auckland Road have stock which dates back predominantly to the pre1940 – 1969 period, whilst Shaftesbury Court stock predominantly dates back to 1970 – 89.

3.126 Reflective of the dated nature of stock, exacerbated by a lack of investment, the quality of stock across these three sites is relatively poor, particularly at Shaftesbury Court, however the stock at Lea Park Trading Estate is in better condition, albeit it is still of rather average quality.

3.127 The occupiers of these sites are local in nature, and the Auckland Road site is in single occupancy by Bywaters, operating the Leyton Reuse and Recycling Centre. Types of uses at
Lea Park Trading Estate and Shaftesbury Court tend to be B1c and B2 uses and include JB Foods Ltd. (at Lea Park Trading Estate) and Titan Forge Ltd (at Shaftesbury Court).

3.128 Generally accessibility is poor within this sub-cluster, both strategically, and in terms of direct site access. For both Lea Park Trading Estate and Shaftesbury Court direct site access is significantly challenged by access roads which are residential in nature, and often narrow with poor manoeuvrability and limited or no signage. Specifically in the case of Shaftesbury Court the site access is also opposite a school entrance. Neither of these sites are well connected to the strategic road network.

3.129 However, Auckland Road is an exception within this sub-cluster. It has good direct site access suitable for large vehicles, which is particularly important considering its recycling uses, and has a good connection to Ruckholt Road, linking to the A12. As such, whilst lying within a generally ‘poor quality’ part of the cluster this specific site could be considered to be of ‘average’ quality in and of itself.

3.130 Internal circulation within sites is particularly poor for Lea Park Trading Estate and Shaftesbury Court, which are congested with parking and the manoeuvring of vehicles, which for Lea Park Trading Estate is exacerbated significantly by the narrow routes and space between units.

3.131 Analysis of the employment sites within the Upper Lee Valley OA Cluster has led to the following site specific advice, as shown below in Table 23.
### Table 23 - Advice on Future Action for Cluster 4 Employment Sites

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Future Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blackhorse Lane</td>
<td>Protect and Enhance</td>
</tr>
<tr>
<td>Ferry Lane Industrial Estate/Station Hub</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Sutherland Road</td>
<td>Protect and Enhance (part) - particularly to the south and west to grow the emerging creative cluster Monitor and Manage (part) - particularly the Webbs site and some poor quality units to the north and west edges</td>
</tr>
<tr>
<td>Alpha Business Centre &amp; Car Park (WTC Site 15)</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Brunner Road</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Argall Avenue Extension</td>
<td>Protect and Enhance</td>
</tr>
<tr>
<td>Argall Avenue</td>
<td>Protect and Enhance*</td>
</tr>
<tr>
<td>Rigg Approach</td>
<td>Protect and Enhance*</td>
</tr>
<tr>
<td>Heybridge Way</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Lammas Road</td>
<td>Protect and Enhance*</td>
</tr>
<tr>
<td>Former Town Gas Works</td>
<td>Protect and Enhance*</td>
</tr>
<tr>
<td>Lea Bridge Gas Works</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Church Road (Lea Park Trading Estate)</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Church Road</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Orient Industrial Park &amp; Leyton Business Centre</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Shaftesbury Court</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Auckland Road</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Sherrin Road</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Temple Mills Lane</td>
<td>Protect and Maintain</td>
</tr>
</tbody>
</table>

*Note: Advice on Rigg Approach, Argall Avenue, Lammas Road and the Gas Works is subject to further consideration in the following section and wider strategic decision making about the future of industrial sites within this cluster in light of ongoing need to identify housing land. However, if the decision is to retain these sites for employment purposes they should be subject to significant enhancements and upgrading. |

3.132 The majority of sites within this cluster, at present, provide a significant contribution to the economy of Waltham Forest and accommodate the majority of the borough’s major employers. However, as recognised by the survey results there are future challenges to the future suitability and attractiveness of sites for employment activity, particularly in the context of anticipated changes to the economic make-up of the area.

3.133 The most significant challenges and opportunities lie within the sub-clusters of sites that form the borough’s reservoir of Strategic Industrial Land at Lea Bridge Road and Blackhorse Lane. Strategically they are well located and provide good road connections, they also both benefit (or in the case of Lea Bridge Road will soon benefit) from good public transport access.
3.134 At present they make a mixed offer to businesses, with areas of poor quality stock and under-utilised land/premises sitting alongside better quality, newer buildings. Throughout the area the offer is focussed on a mix of light industrial, industrial and storage/distribution activity.

3.135 With improved and improving transport connections and a large amount of underutilised space these locations are coming under increased pressure to accommodate a wider range of activities – in particular new residential development. To continue to meet employment needs and ensure the borough maintains an economic function the property offer may also need to evolve, providing better quality space for businesses and introducing new types of accommodation that aligns with the expected nature of growth.

3.136 It is recognised that some sites already have their future determined and will result in the loss of employment capacity if (and when) schemes are delivered. Given the strategic need for employment space in the borough it is important that the future of remaining sites continues to provide employment capacity. However, as Waltham Forest’s (and London’s) economy evolves so too does the nature of employment space required. Traditional manufacturing and industrial facilities and land in some locations are no longer required and business activity becomes more intensive in its use of floorspace capacity and more compatible with a mixed use environment.

3.137 Given this increased compatibility and the challenges to the private sector in delivering new ‘standalone’ commercial floorspace viably more innovative ways of retaining and enhancing employment capacity are likely to be required, particularly for a borough such as Waltham Forest where there are competing priorities for land.

3.138 Achieving the provision of new floorspace may be possible through the delivery of new mixed use development, securing new (or protecting existing) floorspace that is compatible with residential activity and can create a higher quality environment to encourage higher value activity. Clearly in some locations this will not be compatible or desirable as it will impinge on the functioning of businesses, in other less ‘sensitive’ locations this may be achievable. However, as discussed later in this report the approach to mixed use development will need to be carefully considered and planned to retain the integrity of SIL designations in particular.

3.139 Delivering new forms of workspace is likely to require a significant improvement in the environment to attract different businesses; these will also achieve higher levels of employment activity on the sites. This may enable a more mixed use approach to be undertaken on parts of these sites where higher density employment activities can be integrated into mixed use development. However, it will be critical that any future approach does not compromise the trading environment for existing employers who will remain within these sites.
3.140 A mixed use redevelopment should seek to maximise the reprovided level of floorspace, potentially enhancing levels of employment through greater density. Within appropriately planned schemes this can be achieved viably and also create a mutually reinforcing offer for employment and residential activity.

3.141 The focus of future provision in this cluster should not solely be on the large SIL and BEA sites. Indeed the smaller sites within this cluster are equally important in maintaining the borough’s economic capacity, however many are challenged in terms of their accessibility and/or quality of stock. Despite these challenges there remains high levels of occupancy suggesting there continue to make an attractive offer to the market, although it should be recognised that some of this is a result of non-B class activity such as Screwfix at Heybridge Way.

3.142 Whilst many are not in ideal locations for business activity it is important these sites are protected whilst they still meet business requirements and no alternative stock or provision is available. Over the plan period there is likely to be a need to see these sites redeveloped as their stock reaches the end of its serviceable life. When this occurs the decision to continue to protect should be based on the appropriateness of the location (site) not the premises within it. The factors that make the site a “good” proposition are unlikely to be diminished (principally scale, access, land form, location) even if the stock is obsolete.

Cluster 5 - Leyton & Leytonstone

3.143 Ten active employment sites are identified within the Leyton & Leytonstone Cluster, as shown below in Table 24. The total area for these sites equates to 12.18ha of employment land.
<table>
<thead>
<tr>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Site Status</th>
<th>Predominant Stock Quality</th>
<th>Overall Quality Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEA4 (10 &amp; 1331093)</td>
<td>Dunton Road</td>
<td>0.95</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>High Road Leyton</td>
<td>1.76</td>
<td>LBW Clusters</td>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>1331252 (crossover with 7)</td>
<td>Hainault Road Triangle</td>
<td>1.24</td>
<td>Employment land with planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA18 (8)</td>
<td>Hainault Road - The Sidings Industrial Estate</td>
<td>1.44</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Wood Street Goods Yard</td>
<td>1.33</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Midland Road Railway Arches &amp; Residential Area</td>
<td>1.45</td>
<td>LBW Clusters</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA17 (6)</td>
<td>Joseph Ray Road</td>
<td>1.60</td>
<td>Borough Employment Area</td>
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<td></td>
</tr>
<tr>
<td>BEA20 (37)</td>
<td>Lancaster Road Arches</td>
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<td></td>
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<tr>
<td>BEA1 (1)</td>
<td>Howard Road</td>
<td>1.40</td>
<td>Borough Employment Area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEA14 (38)</td>
<td>Montague Road/ Courtnay Road Arches</td>
<td>0.40</td>
<td>Borough Employment Area</td>
<td>Mixed</td>
<td></td>
</tr>
</tbody>
</table>
Figure 11 - Leyton & Leytonstone Cluster Sites

- BEA 4 Dunton Road
- 36 High Road Leyton
- Hainault Road Triangle
- 7 Wood Street Goods Yard
- 8 Midland Road Arches
- BEA 1 Howard Road
- BEA 20 Lancaster Rd Arches
- BEA 14 Montague Road/ Courtnay Road Arches
- BEA 17 Joseph Ray Road
The stock type within this cluster is dominated by railway arch units, which form part (if not the majority) of the stock on six of the sites (Dunton Road, Site 36, Midland Road Railway Arches * Residential Area, Joseph Ray Road, Lancaster Road Arches and Montague Road / Courtnay Road Arches). Other non-railway arch stock consists mainly of fairly small light industrial units with a fine grained site layout nature. There is a limited amount of storage / warehouse units on sites within the cluster, and those evident tend to be relatively small in scale.

Wood Street Goods Yard provides a more mixed offer, with some larger light industrial space which, in the main is in poor condition and serving as a large warehouse unit at frontage of Hainault Road and Norlington Road, with other industrial activity to the rear. Further south along Norlington Road lies a small cluster of older industrial buildings including the large Portland House and Walbrook Works buildings (which appears to be in use as artist studios and workspaces via SpacedUp). The parts fronting Norlington Road have considerable character but are of poorer quality at present – to the rear of these buildings are a series of large footprint industrial buildings which lie between the railway and the terrace of houses on Norlington Road.

There is some variation in the stock quality across sites within this cluster between average and poor quality, however there is no evidence of particularly good quality stock. Particularly poor stock condition is often synonymous with railway arch units, however this is not the case where Network Rail have undertaken, or are in the process of undertaking, rail arch refurbishment. The Sidings Industrial Estate, Joseph Ray Road and Howard Road are particular examples of slightly better ‘average’ quality stock. There is a mix of quality within some sites, examples of which are Site 36, Lancaster Road Arches and Montague Road / Courtnay Road Arches.

The majority of sites in this cluster are identified to be of poor overall quality, considering all of the characteristics across the site assessment matrix. This is particularly due to generally poor location character, building age and quality, neighbouring uses, accessibility and parking and internal circulation. None of the sites within this cluster have been assessed to demonstrate good overall site quality. Exceptions to the poor quality ranking, where the sites are considered to be of average quality, are Hainault Road - The Sidings Industrial Estate, Joseph Ray Road and Howard Road.

The nature of occupiers of the sites within this cluster is largely local, although with some regional and national occupier presence on several sites within the cluster. Regional presence is evident on Site 36 and at Joseph Ray Road, and national presence is potentially evident at Joseph Ray Road and Howard Road. Uses with this cluster tend to be B1c / B2 uses, particularly B2 with a lot of vehicle repair related uses evident in railway arch units.

There is some variation evident in the accessibility of sites within this cluster both strategically, and in terms of direct site access, however for the majority of sites, overall access is
categorised as being poor. Exceptions to this are Joseph Ray Road, Howard Road and Wood Street Goods Yard, where access overall is considered to be relatively good.

3.150 Direct site access is challenging for the majority of sites within the cluster, contributed to substantially by the residential character of the surrounding location of many sites, with access roads being residential streets (which can often be fairly narrow and/or obstructed by on-street parking), and the nature of railway arch units (which tend to have limited yard space and often have a narrow access route) and make up a large proportion of the units within this cluster.

3.151 Strategic access to the road network is fairly good for a few sites, particularly Joseph Ray Road and Howard Road, however for the majority of sites even if there is decent proximity to a trunk road such as the A12 there is not good accessibility onto it for site users.

3.152 Based on the site assessments there is very limited evidence of significant vacancy within this cluster. Wood Street Goods Yard and Lancaster Road Arches are the only sites where vacant units are clearly identified, although there may also be several vacant units at Hainault Road – The Sidings Industrial Estate. Potential for physical intensification within the cluster is also very limited, with the same two sites (Wood Street Goods Yard and Lancaster Road Arches) being the only ones to demonstrate any such potential, based on their site layout and vacancy, rather than the evidence of any vacant land on site.

3.153 One future area of opportunity would be Howard Road where part of the BEA covering the area is occupied by a now vacant large retail unit formerly occupied by Homebase. The ongoing retail study for the borough suggests this could be a suitable location for a replacement retail offer, however as part of an existing employment site it could (in whole or part) be an opportunity to deliver new workspace. The site benefits from reasonably good access to the A12 and is a relatively short walk from Leytonstone High Road station and therefore could provide a good location for further light industrial and workshop space to complete the existing Acacia Business Centre.

3.154 The office offer within this cluster is relatively dispersed, however there is a small cluster within Leytonstone town centre to the north of the station. A number of units are provided above retail or within converted premises however 3 Lemna Road (400sqm), Robart House (1,800sqm), Waltham House (900sqm) and Kirkdale House (3,000sqm) provide purpose built stock of average quality accommodating a mix of public sector and professional service businesses.

3.155 As a small cluster this area provides a reasonable offer to the market, albeit one predominantly underpinned by public sector agencies. The stock is of sufficient quality to offer opportunities in the future to accommodate other businesses should it become vacant however at present there are limited vacancies recorded.
3.156 Analysis of the employment sites within the Leyton & Leytonstone Cluster has led to the following site specific advice, as shown below in Table 25.

Table 25 - Advice of Future Action for Cluster 5 Employment Sites

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Future Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dunton Road</td>
<td>Protect and Enhance</td>
</tr>
<tr>
<td>Site 36</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Hainault Road Triangle</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Hainault Road - The Sidings Industrial Estate</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Wood Street Goods Yard</td>
<td>Monitor and Manage</td>
</tr>
<tr>
<td>Midland Road Railway Arches &amp; Residential Area</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Joseph Ray Road</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Lancaster Road Arches</td>
<td>Protect and Enhance</td>
</tr>
<tr>
<td>Howard Road</td>
<td>Protect and Maintain</td>
</tr>
<tr>
<td>Montague Road/Courtnay Road Arches</td>
<td>Protect and Maintain</td>
</tr>
</tbody>
</table>

3.157 What has become clear through the analysis of this cluster is that the stock of railway arches is a valuable resource in terms of meeting the requirements of future employment space within the south of the borough. Much of the stock is under-utilised and contributes little in the way of employment generation or the attractiveness of the locations within which they are located.

3.158 Enhancements to the arches are currently underway and will help test/prove the opportunity for the wider set of assets however it may be necessary to work with Network Rail or other owners to promote a coordinated approach to enhancement seeking to bring units currently underused into active use and upgrading the quality of poorer units to encourage more intensive use.

3.159 Whilst the contribution to meeting overall employment floorspace needs may be limited the arches offer an opportunity to grow local economies in the south of the borough and support activities that may be crowded out of other sites as redevelopment occurs. It will be vital that arches can play a range of roles appropriate to their locations. For example arches close to Leytonstone High Road should seek to provide a complementary offer to the town centre, potentially including higher quality office/studios and café activity. However in areas with less footfall, with a greater impact from the railway itself or in close proximity to other employment sites, these units could be used for more industrial activity or to continue providing essential services such as car repairs.
3.160 Much of the stock in this cluster lies within predominantly residential and is therefore unsuitable for activity that relies on heavy goods vehicle access, however a range of other activities can be accommodated and add value to the local economy.

3.161 The Wood Street Good’s Yard provides a good example of where a complementary offer could be evolved, particularly within the character buildings to the south. Already being used for a range of activities (including creative workspaces) the quality of units and offer could be improved to provide further spaces suitable to new business activity. With reasonable road connections and within a 15 minute walk of two stations the re-use of this site in the future could make a considerable contribution to the Leyton and Waltham Forest economy.

3.162 The SPD for this area recommends a mixed development approach that would deliver new compatible forms of business space that will help support the evolution of the economy in this location.

3.163 Outside of the allocated employment sites within this cluster there is the potential to deliver additional employment floorspace at the Construction Skills Training Centre in Leytonstone, which currently provides an education facility but could deliver alternate types of space in the future.

**Future Employment Supply**

**Vacant Stock**

3.164 Data sourced from CoStar Focus at the baseline stage of the Employment Land Supply assessment process identifies the available premises within the Borough, which are currently being actively marketed, and which in theory could be occupied by new employers.

3.165 To summarise the current availability data, as of March 2015 the following stock was being actively marketed:

- 13 office units, totalling c.3,700sqm of available office floorspace (equating to 0.37ha)
- 17 industrial units, totalling c.16,400sqm of available industrial floorspace (equating to 1.64ha)

3.166 Current available stock would therefore be unlikely to have any significant impact on the overall future employment supply in Waltham Forest, particularly considering that there may be quality issues with the existing stock which may mean it is unlikely to be re-utilised in the future.

3.167 Based on the site assessments undertaken on the 40 active employment sites in the Borough, there is very limited evidence of significant vacancy on active employment sites, with the
notable exception being some levels of vacancy on a number of sites within Cluster 4 - Lee Valley Opportunity Area, which to a large degree reflect sites with existing redevelopment proposals.

3.168 Considering this analysis of vacant stock and employment land within the Borough, there are a limited number of available vacant sites which provide the potential for accommodating future employment use. This means that future employment growth and increased job provision in the Borough will need to be facilitated largely through the redevelopment and/or increased intensification of existing employment sites.

3.169 Throughout this section it has been highlighted that there are opportunities for more intensive use to be made of either land (such as open storage within Rigg Approach), under-utilised premises (such as Portland House), mixed use development (in areas like Blackhorse Lane) and through potential greenbelt release (at Chingford Island site). Capacity also potentially exists in the town centres of Walthamstow, Leytonstone and Wood Street, particularly as the retail offer is ‘re-modelled’ and sites are considered for redevelopment. We consider these approaches in more detail in the following chapter.

3.170 As identified in Section 2 a considerable share of employment growth will be within B1 use classes, allowing for the majority of employment growth to be accommodated within more intensively used sites. However, there is still likely to be growth in B8 activities, which by their nature are ‘land hungry’. Whilst these B8 uses are unlikely to be orientated towards strategic logistics it still requires a significant amount of floorspace, therefore some economic growth may not be achievable through intensification.

3.171 Accommodating employment land needs within the borough is challenging given the constrained supply. It is made even more challenging by the pressures on delivering residential development within the Borough, in order to contribute to meeting the target of delivering 20,100 homes in the Upper Lee Valley Opportunity Area by 2031, delivering 2,000 units per annum within the borough, and meeting the annual average London Plan housing target of 862 dwellings for the Borough. This is putting increasing pressure on the functionality and role of Waltham Forest’s current employment sites in the future.

**Loss of Employment Sites**

3.172 This section considers sites which have been identified (and in some cases fully assessed) as part of this employment land supply assessment, which are no longer in active employment use, as shown below in Table 26. These sites total 21.32ha of land. This is based on information provided by the Council at the outset of the commission, however we understand it may not be exhaustive, with further sites potentially being lost, particularly in regeneration areas such
as Sutherland Road where the Headbourne House and Unity Works sites have largely been lost to non-employment activity.

### Table 26 - Sites with no active B class employment use

<table>
<thead>
<tr>
<th>Site Ref</th>
<th>Site Name</th>
<th>Site Designation</th>
<th>Area Cluster</th>
<th>Site Area (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1331186</td>
<td>Station Car Park</td>
<td>Other major housing sites</td>
<td>Chingford &amp; Highams Park</td>
<td>0.59</td>
</tr>
<tr>
<td>1331042</td>
<td>Former Chingford Municipal Offices</td>
<td>Other major housing sites</td>
<td>Chingford &amp; Highams Park</td>
<td>1.02</td>
</tr>
<tr>
<td>1331024</td>
<td>Billet Works</td>
<td>Employment land with planning</td>
<td>North Circular Corridor</td>
<td>3.03</td>
</tr>
<tr>
<td>1331209</td>
<td>Walthamstow Greyhound Stadium</td>
<td>Other major housing sites</td>
<td>North Circular Corridor</td>
<td>3.25</td>
</tr>
<tr>
<td>1331001</td>
<td>123 Chingford Mount Road</td>
<td>Other major housing sites</td>
<td>North Circular Corridor</td>
<td>0.54</td>
</tr>
<tr>
<td>27A</td>
<td>Clifford Road</td>
<td>LBW Clusters</td>
<td>Walthamstow</td>
<td>3.92</td>
</tr>
<tr>
<td>1331002</td>
<td>1-2 Station Approach Hoe Street</td>
<td>Other major housing sites</td>
<td>Walthamstow</td>
<td>0.53</td>
</tr>
<tr>
<td>1331110</td>
<td>Arcade Site (WTC Site 7)</td>
<td>Other major housing sites</td>
<td>Walthamstow</td>
<td>0.67</td>
</tr>
<tr>
<td>1331150</td>
<td>PaperMill Place, Sutherland Road (24A)</td>
<td>Employment land with planning</td>
<td>Upper Lee Valley OA</td>
<td>0.43</td>
</tr>
<tr>
<td>1331061</td>
<td>Former Grange Road Industrial Estate</td>
<td>Employment land with planning</td>
<td>Upper Lee Valley OA</td>
<td>0.57</td>
</tr>
<tr>
<td>18</td>
<td>St Helens Place</td>
<td>LBW Clusters</td>
<td>Upper Lee Valley OA</td>
<td>2.12</td>
</tr>
<tr>
<td>1331091</td>
<td>Former Nissan Car Dealership</td>
<td>Employment land with planning</td>
<td>Upper Lee Valley OA</td>
<td>0.75</td>
</tr>
<tr>
<td>BEA23</td>
<td>Former Municipal Offices</td>
<td>Borough Employment Area</td>
<td>Upper Lee Valley OA</td>
<td>0.29</td>
</tr>
<tr>
<td>1331022</td>
<td>Francis House</td>
<td>Other major housing sites</td>
<td>Upper Lee Valley OA</td>
<td>0.36</td>
</tr>
<tr>
<td>1331048</td>
<td>The Pump House (Steam and Transport Museum)</td>
<td>Other major housing sites</td>
<td>Upper Lee Valley OA</td>
<td>0.41</td>
</tr>
<tr>
<td>1331099</td>
<td>Hammond Court</td>
<td>Other major housing sites</td>
<td>Upper Lee Valley OA</td>
<td>0.34</td>
</tr>
<tr>
<td>1331214</td>
<td>Whitehouse Estate</td>
<td>Other major housing sites</td>
<td>Leyton &amp; Leytonstone</td>
<td>0.55</td>
</tr>
<tr>
<td>1331155</td>
<td>Phase 4, Beaumont Road Estate</td>
<td>Other major housing sites</td>
<td>Leyton &amp; Leytonstone</td>
<td>0.79</td>
</tr>
<tr>
<td>1331258</td>
<td>Stonelea and Thornebury Sites (Part of SSA Site 52)</td>
<td>Other major housing sites</td>
<td>Leyton &amp; Leytonstone</td>
<td>0.82</td>
</tr>
<tr>
<td>1331005</td>
<td>36 - 58 Claude Road</td>
<td>Other major housing sites</td>
<td>Leyton &amp; Leytonstone</td>
<td>0.35</td>
</tr>
</tbody>
</table>

3.173 Two of these sites (Clifford Road and St Helens Place) are designated as LBW Clusters (6.04ha) and one site (Former Municipal Offices) is designated as a Borough Employment Area (0.29ha), however the predominant designations for these sites are ‘Other major housing sites’ (10.21ha), ‘Employment land with planning’ (4.78ha).

3.174 Each of the 20 sites identified now accommodates residential development, which has either been recently completed, or is currently being developed. This reinforces the residential
pressure within the Borough, which is resulting in the de-allocation of employment sites in many cases.

3.175 Considered within the context of the future employment floorspace demand the site-specific recommendations arising from this supply assessment will be an important tool for the Council in monitoring current active employment sites, in order to protect those which provide important employment potential for the future (in their current form or with some investment / redevelopment / intensification), and identify sites which are not currently well-functioning employment sites and may provide some potential for residential development in the future. This is explored in greater detail in the following section.
4. Conclusions and Strategic Recommendations

4.1 The analysis within this study demonstrates the potential for Waltham Forest’s economy to grow significantly over the plan period, this is driven by a range of internal and external factors including expansion of the residential population and the migration of businesses out of Zones 1 and 2. This growth will not only strengthen a number of the existing sectors and activities within the borough but also capture wider economic trends that will broaden the mix of employment within the area.

4.2 Whilst a significant proportion of employment growth will be delivered through non-B class activities all of the demand forecasts considered also indicate significant prospects for employment within the full range of B class sectors to increase. This growth will require the delivery of additional employment floorspace, this will need to both grow the quantum of space as well as diversify the types of space provided within the borough’s portfolio.

4.3 The ability of the Council to capture these strategic trends and harness their benefits to the borough will be influenced by changes to the wider legislative framework for planning. Recent changes have enshrined the extension of permitted development rights on a permanent basis whilst the draft Housing and Planning Bill is proposing further relaxation of controls over conversion of brownfield land to deliver Starter Homes. Many of the tools available to the planning authority in terms of allocating and protecting employment land could be removed, leaving limited opportunities to proactively plan for economic growth.

4.4 The forecast scenarios considered a range of scales and forms of growth based on the prospects for the borough based on local and London-wide growth rates from both Experian and the GLA. In terms of the form of growth, all forecasts were relatively consistent in that they expected the majority of floorspace demand to lie within the B8 sector, with strong demand also for office space and slightly lower requirements for industrial space. This distribution of space is largely a reflection of the ‘land hungry’ nature of B8 activities, in employment terms these are expected to experience lower levels of growth than office based activities.

Table 27 - Forecast Outputs (FTE jobs) 2015-2031

<table>
<thead>
<tr>
<th></th>
<th>Forecast 1</th>
<th>Forecast 2</th>
<th>Forecast 3</th>
<th>Forecast 4</th>
<th>Sensitivity 1</th>
<th>Sensitivity 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office (B1a/b)</td>
<td>1,744</td>
<td>1,906</td>
<td>1,085</td>
<td>1,212</td>
<td>2,289</td>
<td>1,472</td>
</tr>
<tr>
<td>Industrial (B1c/B2)</td>
<td>662</td>
<td>464</td>
<td>164</td>
<td>211</td>
<td>129</td>
<td>-140</td>
</tr>
<tr>
<td>Warehouse (B8)</td>
<td>1,486</td>
<td>988</td>
<td>714</td>
<td>756</td>
<td>677</td>
<td>687</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,891</strong></td>
<td><strong>3,358</strong></td>
<td><strong>1,962</strong></td>
<td><strong>2,179</strong></td>
<td><strong>3,094</strong></td>
<td><strong>2,020</strong></td>
</tr>
</tbody>
</table>
4.5 Based on the four forecasts and sensitivity testing there is clearly a wide range of expected employment growth outcomes and use class mixes. It is clear that if the Council were to seek a ‘maximum’ growth scenario then it would seek to allocate land to meet Forecast 1, which provides the highest and most balanced form of growth.

4.6 However Forecast 1 is a significant outlier in terms of the scale and mix of employment growth. Whilst in some respects it may be desirable to plan for the maximum growth scenario it is likely to present the borough with significant challenges both in terms of the scale of land required (up to 34ha) and in reversing a range of trends which have seen the local economy experience only modest growth in the recent past.

4.7 At the other end of the scale Forecasts 3 and 4 appear to present relatively low levels of employment growth which could see the borough fail to deliver a balanced form of growth between housing and jobs. Whilst this would relieve some of the competing pressures on land within the borough it would fail to capitalise on the strategic opportunities presented by London’s growth.

4.8 Based on the range of growth drivers, the challenges of employment land provision within the borough and relatively recent trends within the property market it is clear that no single forecast fully captures the complexity of growth within Waltham Forest. Given the on-going fluidity of the space and nature of growth there will need to be some flexibility in terms of the types of land and floorspace provided.

4.9 Given the complexities we would recommend that the borough seeks to develop a strategy that creates the capacity for approximately 2,750 FTE jobs based on shares of employment that are biased towards B1 floorspace. Based on the evidence in this Study of business growth and commercial property market activity, the Baseline Report, the Regeneris Business Mapping Study and our professional judgement we would expect this growth to be shared 70% for ‘office’ activity, 10% for industrial and 20% for warehousing.

4.10 Using the approach and assumptions presented in section 2 of this Study this level and split of growth would require in the region of 57,000sqm of additional floorspace, assuming it is utilised at relatively high density in line with how we would anticipate more modern forms of workspace to perform. This would see a requirement of c.19,000sqm of office floorspace, c.10,000sqm of industrial space and 28,000sqm of warehouse space. This would require an indicative land provision of between 7.2ha and 10.6ha depending on the intensity of development, our expectation would be that the land requirement would be at the lower end of this range.

4.11 The current Waltham Forest site portfolio is well geared to providing flexibility to deliver a range of workspaces in the future with a mix of town centre, large (changing) industrial locations
and small urban estates. There are identified opportunities to deliver new, additional space on vacant land and through the redevelopment of redundant or underutilised sites in the town centres and major industrial locations.

4.12 Key opportunities to deliver new and additional floorspace to meet future needs exist in a number of locations including:

- **Chingford Island** – where undeveloped land could be brought forward;
- **Skelton’s Lane, Wood Street** – where areas of open storage and older less efficient properties could be redeveloped;
- **Rigg Approach** – where a number of sites are used for lower value, low employment generating activities including yards and vehicle servicing;
- **Argall Avenue** – where older stock could be redeveloped and under-utilised sites intensified;
- **Sutherland Road** – where older, vacant buildings could be re-purposed and new small workspaces can be integrated into new developments;
- **Wood Street Goods Yard** – where a number of buildings could be re-used or redeveloped to increase employment activity and density;
- **Walthamstow Town Centre** – where mixed use schemes can deliver a range of office and other workspaces.

4.13 Critically these intensification opportunities lie in locations where there is an established economic presence and other sites within the area have benefitted from investment to attract new and increased business activity. Most also lie within key areas of change, where the fundamental characteristics of the place are changing, facilitating new forms of demand and workspace requirements.

4.14 The locations listed above provide the most obvious and immediate locations for intensification, however over the plan period, and as the borough’s business base continues to evolve, other sites and buildings may present themselves as intensification opportunities. To both identify and promote these sites within the market a series of key factors can be used to help ensure appropriate sites are enhanced, these include understanding:

- **Proximity to public transport services**, particularly key for emerging sectors which have a dispersed client base.
- **Onward connections of public transport**, particularly to key central London locations which will underpin the growing creative and tech sector in the borough.
- **Access to trunk road network** – for larger industrial/warehousing activity.
• Relationship to existing clusters of business – demonstrates the demand and nature of place required and creates a series of cluster and agglomeration benefits.

• Evidence of investment in wider area – potentially changing the wider proposition in terms of quality of place, amenity provision and residential offer to complement new economic activity.

• Nature of built stock/activity on site – as the local economy moves towards higher value activity the presence of open storage, builders yards and document storage in key locations will provide opportunities for relocation and intensification with limited impact on current employment levels.

4.15 Intensification opportunities should seek to align with and maximise other committed investments such as new infrastructure provision, public realm investment or complementary workspace interventions. This will allow new space to be geared towards meeting new forms of demand which, inherently, will allow more efficient use of and in turn support higher employment levels.

4.16 However, whilst some capacity exists there are limited opportunities to introduce new land into the portfolio and few sites with vacant land parcels. Coupled with the pressure on existing sites to be allocated in a way that assists the borough in meeting its housing targets the delivery of employment growth potential is likely to require some difficult choices.

4.17 Within the remainder of this section we consider the opportunities for accommodating this growth, the potential considerations in meeting the demand requirement, and more qualitatively the nature of space that will be required to realise the full economic potential of the borough.

**Major Site Opportunities**

4.18 At the simplest level there would appear to be a relatively straightforward strategy for the future use of Waltham Forest’s major employment sites. The borough’s limited capacity and limited ability to allocate additional land would suggest that all employment sites should be retained and protected solely for employment uses.

4.19 However, given the wider context and range of priorities for the borough the choice is not that simple and is unlikely to lead to a desirable approach to future growth or be defensible through planning. With a number of employment sites already being considered for non-employment uses strategic decisions will need to be made on how to retain employment capacity whilst delivering other forms of development.

4.20 It is clear that the borough cannot afford to lose all employment sites if it is to retain a viable economic proposition. The Council will need to ensure that decisions are taken against the
full context of need set out within this report and the understanding that if one site is surrendered then others may need stronger protection in the same location to maintain local capacity.

4.21 Further, what makes a good residential site is also likely to make it attractive to a wide range of employment generating activities. For example improved public transport access at Lea Bridge Road will enhance the residential offer but also allow businesses to connect more efficiently to key markets, potentially attracting new, higher value uses to the area instead of traditional light industry and storage.

4.22 The two need not be mutually exclusive, with sensitive and well planned redevelopment allowing employment to be intensified and other development delivered. There will be a number of key considerations in delivering this growth, which we explore below.

**Reorganisation and intensification**

4.23 The prime source of additional capacity to accommodate employment growth will be through the redevelopment and reorganisation of the existing large employment land sites to enable more efficient use of the land. The stock of SIL within the Upper Lee Valley in particular has been identified as an opportunity for rationalisation and a greater intensity of use to increase employment and has, in recent years, already seen a range of non-B class (and non-employment) uses introduced, particularly around Blackhorse Lane. These areas were identified for release through the Local Plan process.

4.24 Our assessment reinforces the view that these large sites can be used more efficiently in the future and that some reorganisation of land uses, redevelopment of older stock and introduction of new forms of workspace could greatly enhance the intensity of the sites. However, to achieve this greater certainty will need to be provided both in the writing and application of policy moving forward to provide a clear signal to the market over what is expected in each location.

4.25 SIL designations 3, 4 and 5 have a mix of stock which have varying levels of occupancy and utilisation, in many sub areas within these sites employment densities are likely to be particularly low given the scale of space that is used for self-storage and document archiving, waste reclamation, construction yards and car parking. In these locations of low employment density, even replacing out-moded stock with other, modem, industrial/distribution floorspace could increase employment density even without shifting the offer more towards B1 space.

4.26 A comprehensive approach to the redevelopment in these locations could, in turn, lead to a significant uplift in employment activity which could make land available in other locations for other non-B class activities without undermining the borough’s employment capacity and
retaining the integrity of the SIL sites. This may mean that sites that are not currently designated, or considered a lower order priority of site (for example the BEAs), could be brought forward for other uses without limiting the borough’s economic capacity. If intensification is successful it could also mean a future review of SIL could be justified.

4.27 However, it needs to be recognised that not all lower employment density businesses can be relocated easily. Whilst many do not necessarily need a location within London, a large number will be servicing the central London economy and therefore need to retain ‘rapid’ access to their clients. This is particularly important to businesses that supply shops and offices across London, requiring easy, efficient access to ensure stock is replenished – particularly where items are perishable.

4.28 A different view may need to be taken of these businesses to understand their value both to Waltham Forest but also the London economy as a whole, understanding the wider impact and influence they have on employment beyond direct employees within the site. This will help inform decisions on the ‘risks’ to the economy of loss of land to other uses and the displacement of what may appear to be relatively low numbers of jobs.

Whole Sale or Partial Release

4.29 There are clear pressures and needs to reconsider the employment land portfolio within Waltham Forest, particularly to encourage more intensive employment activity and also (potentially) non-employment or non-B class uses. There are clearly limited opportunities to do this through partial release or mixed use redevelopment within the SIL designations, where there is evidenced demand for additional SIL-compatible activities and the London Plan guidance is clear that the integrity, critical mass and scale of sites needs to be protected.

4.30 Even if a defensible policy position could be established (which is possible given experiences in other parts of London) there is a clear risk in releasing parts of sites that, over time, there is an incremental erosion of core employment activities as ‘bad neighbour’ relationships increase and landowners begin to seek higher returns through redevelopment.

4.31 A number of locations have experienced similar ‘erosion’ of the industrial and employment offer within London, in particular locations on the edge of Zone 1 and within Zone 2. Within Southwark the ongoing regeneration of Bermondsey has delivered major new housing capacity on former employment sites. Even though this has been a result of a deliberately planned strategy on behalf of the Council completed developments now impact on the functioning of sites original identified to be retained. This pressure in locations such as Tower Workshops is both from the perspective of impacts on the ability to operate noisy/dirty processes and also (on other sites) ongoing uncertainty around the long term plans for sites, reducing lease lengths as owners begin to consider redevelopment.
4.32 Similar experiences have been felt within Camden (in particular around Camley Street), Hackney (around Hackney Wick and the Lower Lee more broadly) and Wandsworth (as the impact of the Vauxhall, Nine Elms, Battersea regeneration ripples outwards). However, new approaches are being developed that seek to learn these lessons and manage change in a way that protects employment activity. The approach to South Tottenham within the Tottenham AAP defines a limited number of areas where change will be permitted, but also seeks to secure replacement space as part of any development. The sites identified tend to not be key ‘gateway’ or frontage sites, retaining the presence of employment activity.

4.33 To avoid the ‘incremental’ loss of sites over time and to retain the core characteristics major designations it is unlikely that a partial release will be appropriate. Instead the borough should set out an alternate strategy that seeks to protect whole sites as they are and release others where the employment offer (or potential) is not so strong. This would be a particularly important consideration for the borough’s stock of SIL, which is designated within the London Plan in order to provide a critical mass of capacity to ensure larger industrial activities are not compromised and can be retained within London.

4.34 This study provides part of the justification for identifying sites within this approach, highlighting those that have weaker fundamentals as employment sites that will limit their future attractiveness. However, the decision will also need to be based on the wider growth needs and objectives for the borough and a strategic ‘choice’ over the relative priority of each component.

4.35 For example, SIL 6 (Lammas Road) provides a relatively weak proposition as a strategic industrial site given its poor accessibility, weak stock offer, low visibility and the dominance of large retail warehouse activity on the Lea Bridge frontage. A wholesale release of such a site may be more defensible and beneficial in terms of future capacity than releasing parts of (for example) SIL 5 (Rigg Approach) or SIL 4 (Argall Avenue) as it will retain the critical mass of these larger, stronger sites which provide a much stronger proposition for future businesses.

4.36 Importantly either of this approach would protect the integrity of the SIL designation and allow businesses to function in an appropriate setting. It would also provide stability and confidence to businesses that their location will not change, encouraging investment in the sites to enhance their employment role.

4.37 Whilst it is usually the role of the employment land evidence base to set the platform for future policy decisions relating to the release (or otherwise) of designated employment sites, it is clear in Waltham Forest that other processes are also shaping the approach to the future use of employment sites. Two areas where this is clearly the case are SIL 4 (Argall Avenue) and SIL 3 (Blackhorse Lane) where public transport accessibility and on-going regeneration initiatives
are driving an approach that is seeking to diversify the areas and deliver a more mixed form of development.

4.38 In the case of SIL 3 much of this land has been released from its SIL designation through the Local Plan process, with the remaining sites now being considered in terms of their future employment floorspace contribution. However, for SIL 4, 5, 6 and 7 the relationship is more complex, with the reintroduction of rail services to Lea Bridge Station increasing the focus on its potential to deliver residential activity in this area.

4.39 Similarly a site forming part of the functional area (albeit not within the designation of SIL 4 (the south-east corner at the corner of Lea Bridge Road and Burwell Road) has been brought forward for a residential development, however the rest of the area remains designated as SIL. Exploratory work for the Lea Bridge Road area identified opportunities for key frontage sites along Lea Bridge Road to be delivered as residential led mixed use development, albeit with limited B class floorspace. Whilst this provides a logical response in place making terms to the new drivers in the area it does provide challenges for the on-going functionality of the SIL.

4.40 Given the nature of the economic base within Waltham Forest and the likely form of future growth it is clear that there will continue to be activities which require and create significant HGV movements. This clearly has implications for the nature of access to and circulation required within employment sites which any new development will need to protect and, if possible, enhance.

4.41 A key risk for areas such as Rigg Approach (SIL 5) and Argall Avenue (SIL 4) will be the ability to service industrial uses at the north of the sites if southern frontages are developed for residential (as is currently being considered). Unless separate access can be created there may be significant conflicts that could adversely affect both the residential amenity and, more importantly in terms of this Study, the ability for existing and new businesses to operate efficiently in these locations.

4.42 Similarly, if partial release were undertaken (on the grounds of wider priorities rather than any employment land imperative) the relationship between residential development and employment activity itself would need to be carefully planned and managed across the borough. Whilst it is common across London for industrial activities to lie adjacent to residential uses to be fully effective and maximise opportunities for both activities it may be beneficial to identify areas of ‘transition’ if the uses will not be separated by infrastructure or natural features such as watercourses.

4.43 These ‘transition’ activities could take a number of forms, including smaller light industrial units, managed workspaces, mixed residential and co-working spaces or ‘live-work’ units, all of which there is likely to be a strong market for within the borough over the plan period. These
would act as ‘buffers’ to larger scale or heavier industrial activities and can also serve to increase employment densities within the major sites.

4.44 These transition zones could intensify employment activity in these frontage locations and retain the employment capacity of the wider employment locations, however this in itself may not be sufficient to justify their release. Approaches in other parts of London are currently seeking to find innovative approaches to industrial land that retains and enhances the employment provision but also allows other priorities to be delivered.

4.45 This responds to the changing nature of activity within industrial locations and the way in which these complement and relate to a wider range of activities and, in many cases, these other uses actually enhance the attractiveness of the industrial stock. Taken alongside strategic regeneration priorities areas such as Tottenham are securing the redevelopment of some industrial sites that reprovides the current level of employment space, enhancing its quality and aligning it more closely to demand, and also securing new residential development.

4.46 Whilst immediate pressures for more mixed development are coming forward within SIL sites, it is not just an issue for them. BEAs that lie within or close to town centres or the boroughs key transport nodes also offer opportunities for mixed use development that protects and enhances employment capacity and provides a viable approach to redevelopment. Specific examples are considered later in this section, but given their scale and location they are less likely to significantly impact on the functionality of other industrial activities.

4.47 Overall, whilst there are some opportunities for partial release of sites to allow a more mixed for of development to take place it is clear that, for the SILs at least, these could create significant issues for existing and future industrial activities. Whilst in some locations these are not insurmountable they do not necessarily provide the most appropriate and defensible approach to the SILs.

4.48 Based on wider regeneration priorities there is likely to be a need to release some industrial land. However given the evidence in this study it will be critical that this does not undermine the functionality of the SILs given the identified future need for industrial capacity. Should wider priorities lead the Council to consider SIL release this is likely to be better undertaken through the release of a whole site, with a parallel strategy for investing in and enhancing the offer of other SILs and the designation of new capacity elsewhere such as the Gas Holders (Site 14) or Chingford Island.

4.49 Regardless of the strategy pursued by the Council it is of fundamental importance that future development enhances the quality of the offer in terms of employment space, ensuring it is fit for purpose and appropriate to meet the needs of existing and new businesses and sectors.
Therefore, redevelopment should seek (where appropriate) to secure new, integrated workspace. Where this is not possible funding should be available (potentially through the creation of a developer contribution resourced mitigation fund) to provide investment into enhancing workspace in other locations. The Council may need to set the example in this regard where its own sites are being brought forward.

**Role of Council Assets**

4.50 In securing the reorganisation and intensification of employment activity within the major sites the Council may need to take on a proactive role beyond that of setting the broad spatial strategy. In a number of locations the Council itself has land ownerships and interests that can be used to ensure employment capacity is retained and enhanced through redevelopment, either as land parcels themselves or as part of a wider joint development with adjoining private ownerships.

4.51 The Council’s land assets can be used to demonstrate the market for future employment activity and help raise the quality of the offer within areas of change in the borough. Used as part of a comprehensive redevelopment approach the Council’s land can be used to create a greater quantum of development overall and, within this, secure the appropriate levels of employment space. The Council’s perspective on ‘best value’ and return on investment is likely to differ from the private sector, therefore enabling the viability model to operate on a different basis which could help encourage greater floorspace delivery.

4.52 This approach will be valuable in a number of locations, including Lea Bridge Road and Site BEA 3 where the Council is not the majority land owner but has control of significant assets in order to influence the nature of development. It will be important that the Council uses its land to demonstrate its aspirations for employment generation are achievable, ensuring its assets contribute to the type of development the Council will want to encourage the private sector to deliver over the plan period.

4.53 The Council’s other levers and influences should also not be under-estimated. Given the strategic designation of the major opportunity sites as SIL a more mixed use approach to future development will be difficult (or expensive) to achieve for a developer without the Council’s support.

4.54 The Council’s policy and plan making powers provide a mechanism to influence the development market in this context. The development of the next iteration of planning policy could identify the areas where mixed use development on protected employment land may be considered but also set clear rules as to the grounds on which it would be entertained. This could include the proviso that residential uses will only be considered where they are seen to support the delivery of at least an equal amount of improved employment floorspace as exists
at present. Viability modelling can be used to test the relationship between residential and commercial space required to make this happen.

4.55 Depending on the Council’s priorities there are also financial mechanisms that can be used to secure commercial floorspace delivery. For example, the Council could consider replacing the need for affordable housing in developments on protected employment land with a need to provide employment floorspace if development cannot be shown to be viable delivering both.

**Forms of Space**

4.56 To address the economic shifts affecting Waltham Forest and to meet the future requirements of existing and potential occupiers, there is both a requirement and an opportunity to introduce new types of floorspace to broaden the current portfolio. This will help to broaden the appeal of the major opportunity sites, and support a more mixed use approach in the future, but will be equally valuable across the wider stock of employment sites.

4.57 Across all workspace types the focus needs to be on raising the quality of the offer in terms of the fit out and appearance of the buildings and spaces. This does not necessarily require a corporate ‘Grade A’ standard, but rather provide modern, fully serviced interiors that benefit from high speed internet connections and good light as well as access to a range of other services and amenities either onsite or within the immediate area.

4.58 Championing the delivery of improved broadband infrastructure will be a vital component in the future as all businesses become increasingly reliant on computer based processes. The relocation of higher value creative and manufacturing businesses to Waltham Forest will be intrinsically linked to future ICT connections. As will the retention of more traditional industrial and engineering activities as computer-aided design, prototyping and production techniques become increasingly commonplace. Ensuring the physical context within which businesses operate supports their changing needs is therefore vital to retain a viable presence.

4.59 More widely, complementary amenity and service offers will be critical in establishing the future proposition as new forms of business seek informal facilities such cafes and other ‘networking’ spaces. Often these are integrated into managed workspaces and form part of the informal co-working space, however in more general business areas these can be a standalone offer similar to the café within the Leyton Industrial Village.

**New Workspace Typologies**

4.60 As investigated earlier within this report the range of business space provision within London has change significantly in recent years as the economy itself has broadened, the approach to doing business has changed and costs of locating within London have increased.
4.61 For many small and start-up businesses, particularly within creative, digital and micro-manufacturing sectors, shared workspaces are becoming a vital component of the accommodation spectrum, allowing access to good quality space but at a lower cost than taking on an individual industrial or workshop property.

4.62 The co-working and maker spaces have started to be delivered within the Upper Lee Valley, with spaces now provided within Waltham Forest itself (at Blackhorse Workshop), Enfield (Building Bloqs) and Haringey (Carvall Warehouse). These have ‘re-purposed’ existing industrial buildings to create a range of facilities, however more widely across London the growth of the sector is also seeing new stock delivered for this purpose, often alongside more traditional workspace.

4.63 In supporting the continued presence and growth of the small industrial/production sector in the borough as well as helping the fledgling creative sector to grow the provision of these spaces will be key component of future supply. They work best within mixed use environments where businesses can interact and benefit from wider amenity provision.

4.64 The growth of these sectors (alongside rising costs of residential property) has also reinvigorated the market for live-work provision in London. At present much of this is relatively ad hoc, with a number of industrial units being used for this purpose across the Upper Lee Valley. However, increasingly purpose built and managed stock is coming forward to meet demand such as The Collective’s high quality development at Old Oak (Willesden Junction) and Issigonis in Shepherd’s Bush.

4.65 The key to successful delivery of these spaces is the long term management arrangements, ensuring the live-work offer remains exactly that rather than the workspace slowly being integrated into the live element. However new models are being evolved that manage the units in similar way to private rented stock rather than freehold sale, allowing leases to stipulate and regulate the employment activity.

4.66 These new forms of workspace tend to complement and integrate with a wider range of uses and benefit from the provision of retail, café and even residential spaces. New models of delivery are bringing forward integrated developments both at a site level but also within vertically mixed buildings.

4.67 The nature of these workspaces offer a wide range of delivery mechanisms and approaches in terms of development and on-going management are available from relatively standard site purchase and development by a provider through to service level agreements with an operator within a Council owned property.
4.68 Whist approaches are flexible to suit the context what is common is that successful delivery and operation requires the involvement of a specialist company who understands the needs of small business and, in particular, specific sector activities. There are a growing range of operators who will engage at a range of levels and scales.

4.69 Large operators such as the Workspace Group, Resolution or the Collective can take on the whole project, from securing planning, through development to on-going operation in either new build or refurbishment projects. Others, such as the Mill Co Project and Assemble, seek to take on leases for existing space, but will undertake refurbishment works to ensure they are fit for purpose.

4.70 There are also a range of specialist managers/providers of Maker Spaces with specific knowledge of micro-manufacturing and production techniques and equipment, in London these include Techshop and Fablab (both part of national/international networks) and are often delivered with support from public sector or other institutions.

4.71 Regardless of the specific approach or partner it is vital that they are identified and engaged early in the design and development process to ensure that they can guide the workspace proposition and ensure the final development delivers usable and financially viable amounts and forms of space.

New small-medium light industrial units

4.72 Whilst the ‘new forms’ of workspace are a key ingredient, there will be an on-going requirement for new small-medium light industrial units. Whilst there are some currently provided in the borough these are well occupied and therefore opportunities for new businesses are limited.

4.73 Linked to the need for ‘hybrid units’ identified below, it may be beneficial to provide light industrial units with a good quality, integrated, office component to enable a wider range of design and production businesses to access space.

4.74 These are likely to be delivered in a relatively straight forward manner by landowners, but could also form part of managed workspace approaches.

Office units

4.75 As recognised through the supply analysis there is a lack of good quality, appropriately sized office space provided within the borough. Given the potential nature of employment growth in the future, which will see some shift toward professional and business services, the provision of good quality space will become increasingly important to support the borough in fulfilling its economic potential.
4.76 However, the provision of new space needs to be appropriately sized and located to attract smaller businesses, it is unlikely that large corporate occupiers will seek to locate within the borough given capacity in other, better connected, ‘non-core’ locations such as Stratford, the Olympic Park and Greenwich Peninsula. The provision of managed office space that is flexibly designed, providing a range of small to medium sized units in well-connected locations is likely to be better aligned with the scale and nature of future demand.

4.77 This space could take a number of forms but should seek to add good quality purpose built space alongside any conversion or refurbishment of appropriate buildings. In truth the employment site survey found a limited number of buildings that would be able to deliver the appropriate nature of space in locations which also benefit from good access and amenity provision. A further challenge is where these properties do exist they are coming under increasing pressure for conversion to residential.

4.78 A range of providers currently exist to provide this type of space, most are capable of taking on a building shell (often provided as part of a wider mixed use development) and delivering a bespoke fit out geared towards meeting business needs. Some (such as the Workspace Group, Citibase or Regus) will deliver their own buildings either within town centres or as part of a mixed use development.

4.79 Alongside individual serviced/managed office units within a multi-occupier building the provision of ‘club room’ style space which can be accessed on demand may also be beneficial in order to provide space for new residents to work locally. These are increasingly being delivered as part of a traditional managed workspace approach (such as Workspace Group’s “Clubworkspace” offer or We Work’s co-working desks) but also as a standalone offer such as the network of Impact Hubs across London, not for profit offers such as Bathtub2boardroom or more corporate actors such as Central Working.

4.80 The majority of these standalone shared workspaces have been delivered within existing properties, either occupying a single floor of a larger office block (for example Westminster Impact Hub) or a conversion of a small building (such as Bathtub2boardroom’s converted church in Bethnal Green). They tend to take a lease on the space, fit it out then let space on a membership basis.

Hybrid Units

4.81 What is clear from the baseline economic analysis and the forecasts of future growth is that the Waltham Forest economy will continue to attract businesses that are engaged in productive activities. It is true that these activities have (and will continue to) change in nature, however even as new creative and tech-based businesses develop they are still likely to provide some element of production of goods or require storage of components.
4.82 Even traditional engineering and print/design businesses are changing the way they operate, with a greater reliance on IT and, with direct customer servicing, a need to store and hold goods ready for dispatch. The advent of 3D printing, more affordable CNC and laser cutting technology and other new production methods are reinvigorating small batch production.

4.83 As a result of these shifts more flexible business accommodation is often required that provides a mix of office, production and storage spaces. Much of the older generation industrial stock does not provide this mix in a balance that allows these businesses to function effectively and conversion is often cost prohibitive or not achievable. In seeking the evolution of the employment land portfolio new units that blend B1, B2 and B8 space should be encouraged.

4.84 These spaces (much like other forms of workspace considered here) can be provided in a number of ways by specialist workspace providers and general developers. In many respects this integration of uses into industrial spaces is already being delivered in a number of commercial schemes and examples exist in Waltham Forest such as the Leyton Industrial Village.

**Raising the quality and relocating some ‘poor neighbour’ uses**

4.85 Raising the quality of employment sites within the borough will be vital in order to attract more intense and higher value employment activities. Currently the majority of employment sites suffer from a lack of investment either in the stock itself or the public realm within which it sits. In many cases this is a result of fragmented ownerships within sites and a lack of coordinated approaches to common parts. It is also likely to result from the ‘disincentive’ to invest in stock while future plans for sites (and their potential redevelopment) are developed.

4.86 It is no coincidence that the highest levels of occupancy and highest rents are achieved in those locations where stock is newest (or has been refurbished to a good standard) and the common areas are well maintained. Whilst these are often pockets of high quality within a more disparate offer the fact they buck the general trend for sites reinforces the opportunity to increase the value of property if the correct investments are made.

4.87 In seeking to redevelop and change sites the Council will need to develop specific approaches and strategies for each major site in particular, this will be especially critical in locations where residential uses may be introduced. Acting as facilitator and coordinator between land owners will be critical in delivering enhancements to the common parts in particular. Small interventions have been made in Blackhorse Lane for example, but these need to be built upon and extended to make a bigger impact over time. As sites become more successful through informal partnership working it may be possible to formalise arrangements and plans through an independent (business led) body such as a BID.
4.88 Over time raising the quality of sites is also likely to require the reorganisation and relocation of some poor neighbour uses. Currently these are dispersed across sites and therefore impact a larger number of employment sites than is perhaps necessary given the overall scale of activity.

4.89 The economy may be better served by seeking to consolidate these activities into a smaller number of locations, albeit recognising the need to align waste services in particular with residential populations. The role of LBWF land should be considered here as it may help to facilitate such co-location, which may be difficult to achieve without intervention given the pattern of the fragmented ownership and relatively limited site availability.

**Non-B Class Activity**

4.90 As noted within the site surveys a number of the employment sites and clusters accommodate a significant proportion of non-B class activities, ranging from retail, leisure and places of worship.

4.91 In isolation a non-B class activity that operates within a traditional ‘B class’ unit (such as a light industrial building) are not necessarily incompatible with B class activity and do not challenge the overall economic capacity of an area. However, where there are large concentrations, or they occupy key sites they can have a significant impact.

4.92 In common with a number of industrial locations in London some sites in Waltham Forest accommodate a significant number of places of worship, as religious organisations seek to find large, relatively cheap space. This is often a signal that the space being used is no longer fit for purpose for B class activity and, as such, could provide a pointer to where sites have the potential to be redeveloped for other B class activity, enabling intensification of areas.

4.93 The presence, and impact, of non-B class activity needs to be carefully monitored as it can significantly erode the functionality of sites for B class activity. Retail, leisure and places of worship naturally attract people, bringing more vehicular movements to the sites and also potentially creating parking challenges. They also potentially create greater conflicts between people and HGVs, creating greater safety risks, and also mean more people are within the sites outside of business hours, increasing the need for businesses to provide security.

4.94 As these uses often occupy key frontage sites they can also erode the marketability of space to B class uses, diminishing the character of an employment site and affecting its perception within the market.

4.95 Future approaches to designated employment sites will need to be much clearer on the acceptability of specific uses within them and seek to proactively encourage the redevelopment of sites and buildings for new B class activity. It may also require greater
enforcement activity where buildings are being used for purposes that are not in line with site designations.

**Role of Town Centres**

4.96 London’s town centres are going through a significant period of change as shopping, leisure and work habits change. Whilst on the one hand the traditional ‘high street’ retail role is increasingly challenged town centres are rediscovering their function as employment and leisure destinations.

**Walthamstow**

4.97 In recent years Walthamstow has seen significant changes to its offer, both through major property development but also resulting from upgrades to the Victoria Line which have improved the speed, frequency and reliability of services to Central London. The leisure and dining offer in particular has evolved with the development of The Scene bringing new ‘chain’ restaurants to the town, whilst units along Hoe Street have been populated by a number of independent cafes and shops.

4.98 At present the employment floorspace hasn’t been brought forward in the same way however we expect that over time Walthamstow will become a focus for activity based on its:

- Connections;
- Scale of place;
- Amenity provision; and
- Site opportunities

4.99 Based on these characteristics we would expect the town centre, and in particular the area around Walthamstow Central to be attractive for office development in the future, either as part of more comprehensive redevelopment plans for the Mall/Bus Station areas or as standalone development in locations that provide good access to the station such as sites to the south of the station or the east of Hoe Street.

4.100 As discussed above, the offer will need to align with the likely nature of the businesses attracted to the area and should be focussed on small to medium sized units and also the provision of co-working or ‘club-room’ space, which could integrate into a residential development or a straight commercial scheme.

4.101 More widely within Walthamstow the scale of development opportunity also suggests that a wider mix of spaces could be provided that link to the core town centre amenity offer, but provide space that is a distinct offer for Walthamstow. Hatherley Mews and The Tramworks
has developed into a successful cluster of small businesses supported by a range of leisure/dining activity lying close to the main town centre. It provides a mix of office and studio spaces however has recently come under pressure for conversion to residential under the extension of permitted development rights.

4.102 The confirmation that the extension of permitted development rights is now a permanent policy position is a particular challenge for the Council in seeking to protect the types of spaces that are needed to support future economic growth. This pressure is not unique to Waltham Forest, however given the potential economic growth opportunities it may be felt more acutely than elsewhere.

4.103 As major sites around the town centre and towards St James Street station are brought forward there is the potential to deliver further workspace within similar ‘courtyard’ style settings. Both major sites to the south of the High Street and smaller infill opportunities to the north could integrate workspaces, which in turn would help support the retail and leisure opportunities in this location.

4.104 These should focus on providing a mix of spaces, allowing businesses to start and grow within the area. It is likely that these will be smaller units of 100-250sqm, however some larger shared spaces may also be attractive to help support individual entrepreneurs. The size and nature of the shared spaces will need to be carefully considered and, most likely, driven by early stage engagement with a recognised provider.

**Wood Street**

4.105 The district centre at Wood Street is changing significantly in terms of its residential catchment, its inclusion on the Overground network has improved its connectivity to a number of East London’s creative and economic hubs. These changes to the residential population and enhanced connections provide opportunities to strengthen the economic and employment role of the area in the future.

4.106 Whilst it is always likely to remain a relatively small scale economic centre it has the potential to attract an interesting mix of creative and micro-production businesses if the property offer can be appropriately evolved. Currently space is of relatively low quality providing medium sized light industrial units that are largely occupied by retail and trade counter activity.

4.107 It is these sites that, over the plan period, can make a more significant contribution to the Waltham Forest economy, particularly if they are being considered for mixed use development. The provision of small workspaces and studios within any redevelopment, closely linked to the station will help the area (and the borough) capture the on-going migration of creative businesses out of more central locations such as Hackney. Wood Street
would be particularly attractive given the direct Overground connection through Hackney into the City.

4.108 The scale of offer will need to be viable in terms of its on-going operation if it is to be a sustainable operation over the long term, this will require a certain scale of space for the managing business to operate in order to cover the management costs. The scale of space provision is therefore likely to have a ‘minimum’ threshold to make it viable, which will vary depending on the operators business model, however it is common for operators to require at least 2,000-3,000sqm of lettable space (depending on the activity mix and rent levels).

4.109 The provision of integrated workspace into the redevelopment of BEAs and other employment generating sites (even if not in B class use) within Wood Street will require proactive planning that sets out the expectations of development in terms of the scale and nature of space. Workspace providers will need to be an integrated part of the planning any development, ensuring that the space provided and its servicing are appropriately designed to meet business requirements.

4.110 In helping direct the approach to future development the opportunity exists for the Council to take a more proactive role in promoting opportunities and ‘introducing’ prospective developers to workspace providers who are interested in operating in the borough. This approach has been adopted in other regeneration areas, in particular drawing on the knowledge of the GLA in terms of workspace providers which, in turn has assisted in securing Mayoral funding for delivery and fit out of space.

**Leytonstone**

4.111 The potential opportunity for Leytonstone relates to the potential to continue the enhancement and use of railway arch units that run through the area. As identified a number of these are already used for employment activity, however they tend to be of lower value and lower employment density such as car related uses and storage.

4.112 Some arches have already been (or are in the process of being) refurbished and, where closely allied to the town centre, offer the opportunity to provide accommodation to a range of employment-generating activities that can complement the core town centre function. This could include uses that are more orientated towards B1 activity.

4.113 However, outside of the core town centre area it should be recognised that there are issues with accessibility and congestion around some arches, despite this there tends to be very low vacancy levels suggesting they are fulfilling a valuable need in the area. A sensitive approach to refurbishment is therefore required to ensure vital servicing uses (such as car repairs) are not displaced in all locations given there is a lack of stock across the borough that
could accommodate them. Given the wider nature of the area and its relationship to the A12, it is likely new space will attract a range of industrial and warehouse demand.

4.114 More widely, and similar to Wood Street, there is an opportunity to provide more B class space through the long term reorganisation and replacement of trade counter uses and other large retail sites (such as the former Homebase). However, given the value of these uses it is unlikely to be a source of new supply in the immediate future.

4.115 There are clear challenges to the viability of redevelopment of any existing ‘retail’ and trade counter activities given the embedded value of activity. However, as noted in the retail study, there are likely to be opportunities over time as the sector reorganises. In many locations this will facilitate mixed use schemes to deliver viable development which, in line with the above comments related to Wood Street, offer the opportunity to deliver integrated workspace.

4.116 On-going work considering the future of Leytonstone town centre has also identified a series of currently under-utilised sites that could be redeveloped in order to enhance the offer of the town centre. Those close to Leytonstone station in particular have been identified as offering the potential to integrate some workspace provision in response to changing demand in the area as the population grows and diversifies. The future use of office stock (which may come under pressure from permitted development) will be a key factor as its loss will significantly harm the employment capacity of this town centre.

4.117 Again, the scale of provision will be determined by what is operationally viable for the provider, with provision planned and integrated at the development design stage. If a cluster of sites are able to be brought forward in Leytonstone it may be possible for them to act as a ‘portfolio’ for one operator, sharing the management cost across a number of sites and enabling smaller individual provision within each development. To achieve this approach may require support and direction from the Council to help bring operators and land owners together.

Leyton

4.118 Our analysis suggests there are limited opportunities to deliver new employment floorspace within Leyton, with the major potential being linked to the future development of BEA 3 (Auckland Road). This site offer the opportunity to deliver additional commercial floorspace as part of a comprehensive development approach, with considerable capacity if the Council’s own land ownership could be included - albeit this would require the relocation of the domestic waste site.

4.119 The future employment offer of site BEA 3 is likely to be principally influenced by its road links, given it lies some distance from any major public transport hub, with in excess of a 15 minute
walk to Leyton station from the centre of the site. This would suggest that, given the access to Orient Way, it would potentially be an attractive location to deliver new light industrial or distribution space.

4.120 The delivery of new industrial space at BEA 3 is likely to be a challenge for achieving other aspirations for the site, including the delivery of residential accommodation and a school. The provision of smaller light industrial units could be compatible as part of the comprehensive masterplanning of the site, but it would most likely require the re-siting of the domestic waste facility and the existing water storage infrastructure. More integrated shared or managed workspaces could also be supported through comprehensive redevelopment, provided appropriate amenities were also delivered and good quality connections to public transport hubs are delivered.

4.121 We understand there are significant challenges to viably relocating these pieces of key infrastructure. Should this not be achievable and the infrastructure remains in place the delivery of industrial units could be accommodated alongside it without materially harming the attractiveness of the development to occupiers.

4.122 Outside of this major brownfield opportunity there is further potential to create additional employment activity and floorspace in other parts of Leyton. The redevelopment and remodelling of Leyton Mills into a different form of centre could enable the introduction of additional floorspace. If the large format retail activity is retained additional light industrial and warehouse floorspace could provide a ‘complementary’ offer particularly given the good road access options to the A12 and A106.

4.123 If orientated towards a more traditional ‘town centre’ format it is less likely to be attractive to provide industrial spaces but, given the proximity to Leyton Station, could deliver other forms of workspace as part of the mix of uses.

4.124 As identified there are also opportunities to repurpose and intensify the use of existing properties within the Leyton area, most notably in Site 7, Wood Street Goods Yard, where there are buildings with significant character and reasonable connections that could be converted to provide studio and co-working spaces in particular.

Conclusions

4.125 The London Borough of Waltham Forest is at something of a crossroads. It occupies a position within London that is increasingly becoming the focus for economic growth, underpinned by enhanced infrastructure provision, a changing population and the migration of businesses out of more central locations.
4.126 It therefore has the potential to attract and accommodate a significant scale of employment growth and as well as raise the value of economic activity and provide a much wider range of employment opportunities. To achieve this will require better use of existing sites and premises as well as realising the potential of vacant, under-utilised or mixed use sites.

4.127 However, the factors that drive this economic opportunity are also driving demand for increased housing and a range of other retail, leisure and service amenities to be accommodated within the borough. With a finite supply of developable land there is increased pressure for employment sites to be considered for a much wider range of development.

4.128 There are clear links and interdependencies between these two growth pressures, but ultimately they lead to a competing position for most sites, where owners and developers are keen to realise the potential value of land by delivering new housing.

4.129 On the one hand delivery of housing does not have to be at the expense of retaining (and even enhancing) employment capacity. The growth sectors demand a new type of space than what has previously been provided, these workspaces can be better integrated into mixed use environments and generate much higher employment densities within sites. Critically research by Regeneris has highlighted the important contribution made by non-designated sites in supporting this new economy, reinforcing the notion that employment and residential are not mutually exclusive.

4.130 That being said, not all employment activity sits well with other uses, and there will continue to be a need for designated B class sites that provide long term locations for a range of activity. Therefore future policy needs to ensure these sites are protected to the full extent of the Council’s powers to both remove the ‘hope value’ some landowners attach to their sites and therefore encourage ongoing investment in stock. These sites should be protected in a form that retains their critical mass within the market.

4.131 This will undoubtedly require strategic decisions to be made about how the full growth opportunities within the borough can be met in a balanced way. It will require a range of tools, beyond planning, to be deployed by the Council and its partners to both direct and respond to market signals.

4.132 There are examples of where this can be successfully delivered already. The Blackhorse Lane area has seen significant changes in recent years, major housing development is being delivered but at the same time demand for workspace has increased. Through direct intervention in public realm, partnership working with developers, direct delivery of sites and investment in workspace upgrades the Council is now delivering a truly integrated commercial and residential hub that protects the best of the traditional industrial offer, brings
forward new types of workspace, integrates upgraded retail and leisure facilities and delivers significant levels of housing.

4.133 Blackhorse Lane highlights the value in marrying long term planning approaches with a range of investment and development partnerships to create a new identity for Waltham Forest. Whilst different mixes will be required elsewhere it helps demonstrate that, when these decisions are made and followed through, the market will respond and deliver what is required.
Appendix I
Site Assessment Matrix
<table>
<thead>
<tr>
<th>Location Cluster</th>
<th>Site Reference</th>
<th>Site Name</th>
<th>Postcode</th>
<th>Site Area (ha)</th>
<th>Site Designation</th>
<th>Site Status</th>
<th>Dominant Use Class</th>
<th>Location Character</th>
<th>Building Age</th>
<th>Building Quality</th>
<th>On-Site Amenities</th>
<th>Predominant Occupier Nature</th>
<th>Building Age</th>
<th>Environment Quality</th>
<th>Evidence of Pollutants</th>
<th>Adequate Access &amp; Parking?</th>
<th>Internal Circulation</th>
<th>Physical Opportunity for Intensification</th>
<th>Vacant Land</th>
<th>Vacant Buildings</th>
<th>Overall Quality Rank</th>
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</thead>
<tbody>
<tr>
<td>Cluster 1 - Chingford and Highams Park</td>
<td>GVA1</td>
<td>Larkshall Business Centre</td>
<td>E4 6PD</td>
<td>0.37</td>
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<td>B2</td>
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<td>Mixed</td>
<td>Mixed</td>
<td>New residential development</td>
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<td></td>
<td>BEA13 (33)</td>
<td>Highams Park Industrial Estate</td>
<td>E4 9JD</td>
<td>5.65</td>
<td>Borough Employment Area</td>
<td>Active B class</td>
<td>Mixed: B1c / B2 / B8 / sui generis (trade)</td>
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<td>1331079 (crossover with 33A)</td>
<td>Former C &amp; A Warehouse, 1,2,3,4, &amp; 12 Jubilee Avenue, E4 9J D</td>
<td>E4 9JD</td>
<td>4.22</td>
<td>Employment and with planning</td>
<td>Mostly new non B class</td>
<td>B1 / B2 and non B</td>
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<td>1331186</td>
<td>Station Car Park &amp; 458 458 Larkhall Road, E4 9HH</td>
<td>E4 9HH</td>
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<td>Other major housing sites</td>
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<td>1331042</td>
<td>Former Chingford Municipal Offices</td>
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### Cluster 2 - North Circular Corridor

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<tbody>
<tr>
<td>SL 1</td>
<td>Hall Lane</td>
<td>E4 8JE</td>
<td>1.84</td>
<td>SIL 1</td>
<td>Mostly B class</td>
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<td>Ela / Blc</td>
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<td>SL 2</td>
<td>North Circular Road</td>
<td>E4 8GP</td>
<td>4.05</td>
<td>SIL 2</td>
<td>Mostly B class</td>
<td>L/R</td>
<td>Blc / Blc</td>
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<tr>
<td>B6A21</td>
<td>Justin Road/Unity Way Avenue Business Park &amp; New Park</td>
<td>E4 3.20</td>
<td>SIL</td>
<td>Mostly B class</td>
<td>L/R</td>
<td>Mostly B class</td>
<td>Ela / Blc</td>
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<tr>
<td>BEA12</td>
<td>Cabinet Way - Deacon Trading Estate</td>
<td>E4 2.16</td>
<td>SIL</td>
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<td>L/R</td>
<td>Mostly B class</td>
<td>Ela / Blc</td>
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<td>BEA16</td>
<td>Blet Works</td>
<td>E17 SDS</td>
<td>2.01</td>
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<td>Mostly B class</td>
<td>L/R</td>
<td>Blc / Blc</td>
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<td>BEA11</td>
<td>Waltham Park Way</td>
<td>E17 SDS</td>
<td>2.01</td>
<td>BEA11</td>
<td>Mostly B class</td>
<td>L/R</td>
<td>Blc / Blc</td>
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<tr>
<td>1331001</td>
<td>123 Chingford Mount Road</td>
<td>E4 8LT</td>
<td>0.54</td>
<td>BEA11</td>
<td>Mostly B class</td>
<td>L/R</td>
<td>Blc / Blc</td>
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</table>

**Notes:**
- SIL 1: Hall Lane E4 8JE
- SIL 2: North Circular Road E4 8GP
- B6A12: Justin Road/Unity Way Avenue Business Park & New Park
- BEA12: Cabinet Way - Deacon Trading Estate
- BEA11: Blet Works
- Blet Works: E17 SDS
- Waltham Park Way: E17 SDS
- 123 Chingford Mount Road: E4 8LT

**Site Area:**
- Hall Lane E4 8JE: 1.84 ha
- North Circular Road E4 8GP: 4.05 ha
- Justin Road/Unity Way Avenue Business Park & New Park: 3.20 ha
- Cabinet Way - Deacon Trading Estate: 2.16 ha
- Blet Works: 2.01 ha
- Waltham Park Way: 2.01 ha
- 123 Chingford Mount Road: 0.54 ha

**Dominant Use Class:**
- Mostly B class
- Some active B class
- Mostly sui generis
- Non B class

**Location Character:**
- Mostly B class
- Some active B class
- Mostly sui generis
- Non B class

**Neighbouring Uses:**
- Retail
- Trade counter
- Office units advertised to let

**Neighbouring Amenities:**
- Vauxhall car showroom

**Environment Quality:**
- Environment Appropriate for Current Use?
### Cluster 3 - Walthamstow

<table>
<thead>
<tr>
<th>Site Name</th>
<th>Borough Employment Area</th>
<th>Neighbouring Amenities</th>
<th>Environment Quality</th>
<th>Adequate Access &amp; Parking?</th>
<th>Physical Opportunity for Intensification</th>
<th>Overall Quality Rank</th>
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<tbody>
<tr>
<td>BEA10</td>
<td>Non B class</td>
<td>Resi and school</td>
<td>Green</td>
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<td>Yes</td>
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<tr>
<td>BEA22</td>
<td>Mixed</td>
<td>Garden centre, resi and trade counter</td>
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<td>Yes</td>
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<tr>
<td>9</td>
<td>Active B class</td>
<td>Bakery and gin bar</td>
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<td>Yes</td>
<td>Yes</td>
<td>30</td>
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<tr>
<td>BEA19</td>
<td>NA - Site below 0.25ha threshold</td>
<td>Resi and school</td>
<td>Green</td>
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<td>Yes</td>
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<tr>
<td>BEA21</td>
<td>NA - Site below 0.25ha threshold</td>
<td>Resi and school</td>
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<td>Yes</td>
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<td>1331002</td>
<td>Residential development</td>
<td>Residential development</td>
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<tr>
<td>133110</td>
<td>The Scene</td>
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## Cluster 4 - Upper Lee Valley Opportunity Area

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<tr>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Dominant Use Class</th>
<th>Potential Future Employment Site</th>
<th>Current Use?</th>
<th>Neighbouring Uses</th>
<th>Adequate Access &amp; Parking?</th>
<th>Environment Quality</th>
<th>Evidence of Pollutants</th>
<th>Vacant Buildings</th>
<th>On-Site Amenities</th>
<th>Overall Quality Rank</th>
<th>Site Status</th>
<th>Notes</th>
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<tr>
<td>Hammond Court</td>
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<td>Essex Wharf</td>
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<td>Alpha Business Centre</td>
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<td>Blackhorse Lane</td>
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<tr>
<td>Paper Mill Place</td>
<td>2.11</td>
<td>Employment</td>
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<td>St Helens Place</td>
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<td>Church Road</td>
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<td>Fery Lane Industrial Estate</td>
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<td>The Pump House</td>
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<td>Plumstead Road</td>
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## Cluster 5 - Leyton & Leytonstone

<table>
<thead>
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<th>Location Cluster</th>
<th>Site Reference</th>
<th>Site Name</th>
<th>Site Area (ha)</th>
<th>Site Designation</th>
<th>Site Status</th>
<th>Dominant Use Class</th>
<th>Neighbouring Uses</th>
<th>Neighbouring Amenities</th>
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<th>Vacant Buildings</th>
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<tr>
<td><strong>BEA4</strong></td>
<td>10 &amp; 1331093</td>
<td>Dunton Road</td>
<td>0.95</td>
<td>Borough Employment Area</td>
<td>Active B class</td>
<td>E2</td>
<td>Yellow</td>
<td>Red</td>
<td>Green</td>
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<td><strong>36</strong></td>
<td>130 SDF</td>
<td>Thornton Road</td>
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<td><strong>1331292</strong></td>
<td>(crossover with 7)</td>
<td>Harrow Road Triangle</td>
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<td>Wood Street Goods Yard</td>
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<tr>
<td><strong>BEA17</strong></td>
<td>(6)</td>
<td>Joseph Ray Road</td>
<td>1.60</td>
<td>Borough Employment Area</td>
<td>Active B class</td>
<td>E2C / E2B / B8</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td><strong>BEA20</strong></td>
<td>(37)</td>
<td>Lancaster Road Arches</td>
<td>0.62</td>
<td>Borough Employment Area</td>
<td>Active B class</td>
<td>E2C / E2B</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td><strong>37</strong></td>
<td>Lancaster Road Arches</td>
<td>0.63</td>
<td>Borough Employment Area</td>
<td>Active B class</td>
<td>E2C / E2B</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
<td>N</td>
<td>N</td>
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</tr>
<tr>
<td><strong>BEA1</strong></td>
<td>(1)</td>
<td>Howard Road</td>
<td>1.40</td>
<td>Borough Employment Area</td>
<td>Active B class</td>
<td>E2</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
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<tr>
<td><strong>BEA14</strong></td>
<td>(38)</td>
<td>Montague Road/Courtay Road Arches</td>
<td>0.46</td>
<td>Borough Employment Area</td>
<td>Some active B class</td>
<td>E2</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
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<tr>
<td><strong>1331214</strong></td>
<td>Whitehouse Estate</td>
<td>0.60</td>
<td>Other major housing sites</td>
<td>Non B class</td>
<td>Non B class</td>
<td>Yellow</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
<td>N</td>
<td>N</td>
<td>N</td>
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<tr>
<td><strong>1331105</strong></td>
<td>Phase 4, Beaumont Rd</td>
<td>0.59</td>
<td>Other major housing sites</td>
<td>Non B class</td>
<td>Non B class</td>
<td>Yellow</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
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<tr>
<td><strong>1331208</strong></td>
<td>Stonelea and Thornebury Sites (Part of SSA Site 52)</td>
<td>0.82</td>
<td>Other major housing sites</td>
<td>Non B class</td>
<td>Non B class</td>
<td>Yellow</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
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<tr>
<td><strong>1331005</strong></td>
<td>36 - 38 Cluster Road</td>
<td>0.35</td>
<td>Other major housing sites</td>
<td>Non B class</td>
<td>Non B class</td>
<td>Yellow</td>
<td>Mixed</td>
<td>Mixed</td>
<td>Yellow</td>
<td>Red</td>
<td>N</td>
<td>N</td>
<td>N</td>
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</tbody>
</table>