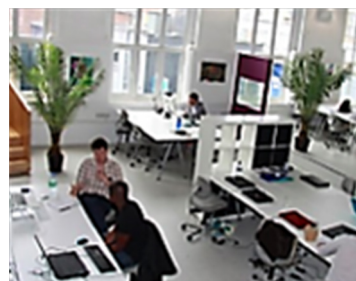


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# London Borough of Haringey Workspace Viability Assessment

December 2014

## Contents

1.	INTRODUCTION .....	3
2.	LONDON MARKET OVERVIEW .....	5
3.	DEFINING WORKSPACES .....	11
4.	REVIEW OF HARINGEY PROVISION .....	22
5.	WORKSPACE VIABILITY ASSESSMENTS .....	67
6.	CONCLUSIONS AND SUMMARY .....	78

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# 1. Introduction

- 1.1 GVA has been commissioned by the London Borough of Haringey (LB Haringey) to undertake a Workspace Viability Study. This work has been carried out in parallel with a separate assessment of the viability of fifteen proposed site allocations. Both studies will provide evidence to inform the Local Plan review process.
- 1.2 The council has currently commissioned and is in the process of finalising an Employment Land Review update which will address the macroeconomic overview of Haringey's existing needs for employment land. This study is not intended to replace the employment land review, rather it provides a more detailed assessment of the opportunity to deliver particular small business workspace types within a number of sites identified by LB Haringey officers. It seeks to establish, based on this sample, a broader set of principles to direct future workspace delivery within existing employment areas.
- 1.3 Employment areas and land values vary with location across the borough. Broadly, land values are higher in the west of the borough, where there is relatively little employment land. In the east (East of the Kings Cross-Edinburgh Great Northern rail line) there is a larger stock of employment land, and the west to east price variance is supplemented by a south (high) to north (low) variance.
- 1.4 This study considers how this value geography affects potential workspace delivery and how employment can be intensified in a viable way, potentially with some level of subsidy from supporting residential development. Within the south east of the borough the study seeks to align (at a strategic level) with the Tottenham Area Action Plan (AAP) which seeks to deliver over 5,000 new jobs and 10,000 new homes. Key to achieving this will be the ability to secure higher employment densities through appropriate workspace provision.
- 1.5 There are industrial estates in the north providing, these continue to provide an important manufacturing and warehousing function. In the south of the borough sites have come under increasing pressure from the residential sector as well as changing needs of 'creative businesses' in a number of locations this has manifested itself through an increasing presence of unauthorised live/work use.
- 1.6 The purpose of this study is therefore to help understand these trends and influences and the role they have in shaping the future workspace offer. It should help to inform and justify employment designations, highlighting opportunities for intensification of employment areas in the future. The questions it addresses include:
- What forms of workspace can be delivered within a selection of areas in Haringey?

- What site specific preconditions are required to enable development of each form of workspace?
- Is it possible to deliver a mix of uses on these sites?

1.7 To answer the above questions the study reviewed the most appropriate type, location and delivery approaches for workspaces in Haringey. It sets a baseline understanding of the existing opportunities for small business workspaces on specific sites in Haringey along with setting a viability position of these sites. This is set within the context of the wider market for a range of workspaces in London, with a particular focus of multi-tenant spaces and those focused on new and emerging small businesses.

1.8 The report follows following structure:

- **Workspace Market Overview:** Chapter 2 explore the state of workspace market in London by looking at their locational factors, occupiers and physical characteristics. It identifies the key difference gaps between workspace provision and characteristics of inner and outer London boroughs.
- **Workspace Typologies:** Chapter 3 delves into the definitions of workspace types that are most suitable for Haringey and their key defining characteristics such as levels of services, types of spaces, building types, typologies, business maturity and sectors that they operate in.
- **Review of Haringey Provision:** Chapter 4 presents more site specific review of existing workspaces in Haringey, identifying them into key clusters to assess the existing opportunities.
- **Viability Analysis:** includes Viability analysis of different location based on different typologies identified in Chapter 3 and Chapter 4.
- **Conclusions and Recommendations**

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## 2. London Market Overview

2.1 The following section sets the strategic context against which the delivery of workspace within LB Haringey needs to be considered. Drawing on pan-London research undertaken by the GLA it provides a high level overview of the market context and recent delivery trends. It considers the key drivers and workspace characteristics common across London, identifying sector specialisms and common workspace typologies. It also highlights geographic trends and differences between workspace types and business activities in inner and outer London. The analysis helps to define the pre-conditions and the key lessons that are applicable in the context of Haringey.

### Key Drivers

2.2 Bespoke small business workspaces in the form we recognise today are relatively a recent phenomena in the UK. They have their origins in the rise of the creative industries as a distinct economic sector in the 1990s, which gave birth to new models of workspace types as business requirements changed from traditional office or industrial premises. Initially these spaces were often collections of artist studios with small ancillary office spaces. However, over time these have evolved into a range of types with more specialised spaces involving different industries, operators and sectors.

2.3 London has seen a phenomenal growth in the provision of high quality small business workspaces in the recent past. The GLA estimates that almost half of all specialist small business workspaces in London have been established within the last two years.

2.4 There are a number of factors which have driven this surge in provision. Clearly the overall growth of the London economy is the fundamental underpinning, with increasing opportunities for small businesses within rapidly evolving design, technology and creative industries in particular. The way big corporates operate is also evolving, with a greater emphasis on out-sourcing elements of activity that previously were kept in-house. A good example is in the life sciences sector where key trial activities are now outsourced, generating a new cadre of specialist clinical trial businesses. However, the life sciences are not alone in this approach, with major software, ICT hardware and digital businesses all seeking greater collaboration. This is driving a need for smaller workspaces in locations accessible to major corporate activity.

2.5 The shift in the sectoral make up of London is also critical to the growth of workspace provision, an increase in creative, technology and design activity has resulted in a new wave of businesses and entrepreneurs that are seeking and favouring 'non-traditional' spaces. In part this is driven by a new business ethos, which values the opportunity to collaborate, but it is also a result of increasing set up costs for a number of tech and design activities. For example it is unlikely that a start-up product design business would be able to access finance to buy its own industry specification 3D printers and other production assets in order to deliver prototypes of its product. However, the growth in

new, shared resources within the new breed of workspaces is removing this barrier to entry and helping to increase access to business to a wider range of people.

- 2.6 It is noticeable that the location of business activity and workspace provision is also shifting. With the significant increase in property prices within London's traditional economic core start-up, small and cost-sensitive activities are increasingly priced out of their historic locations and are seeking new spaces which are more affordable. This phenomenon has already seen businesses relocate from Soho to Westbourne Studios (for example) but is also driving businesses further afield to areas such as Tottenham, Bermondsey and Chiswick.
- 2.7 Importantly, whilst businesses are moving, demand is not entirely footloose. Businesses are increasingly demanding of their surroundings, with start-ups seeking to locate in areas with strong accessibility, a good residential offer and a wider ambience and character that matches how the business and entrepreneurs view themselves.

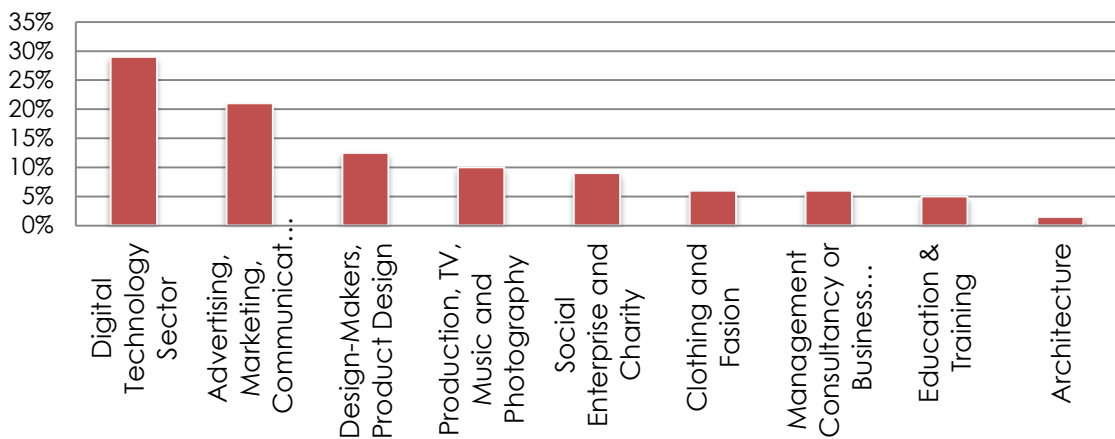
## Workspace Characteristics

- 2.8 The workspace market is not homogeneous, with a range of space types provided that address specific sector needs. There are a number of key trends that will shape demand in Haringey which we will explore in detail below.

### Business Sector Activity

- 2.9 GLA (2014) estimates that within London almost 80% of business activities located within workspaces were classified in the fields of: digital; advertising, marketing and communications; designer-makers and product design; production, TV, music and photography; or with a social enterprise and charity focus (Figure 1). Within these sectors the predominant workspace focus was on digital technology sector, the majority of which are concentrated in inner London. Both advertising and communication related businesses also occupy a high share of workspaces.

**Figure 1: Workspace Sector Distribution - London**

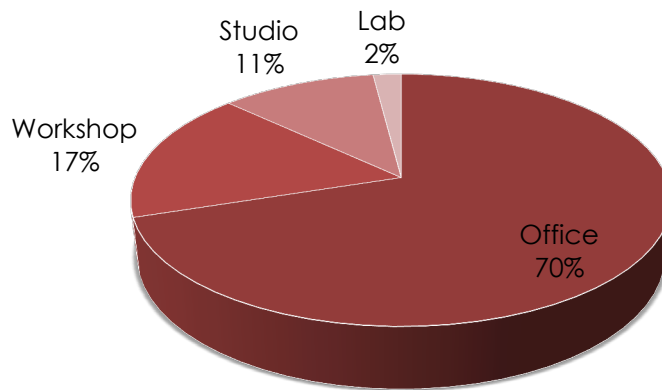


Source: GLA,2014

## Space Type

- 2.10 In terms of the type of space provided, as set out in Figure 2, it is unsurprising that majority lies within relatively generic types, with more specialist facilities representing a very small proportion of overall provision.

**Figure 2: Type of workspace**



Source: GLA, 2014

- 2.11 The majority of identified units in London (70%) provide B1a office spaces. Workshop spaces are a smaller percentage at 17% of identified stock, some of these may include some ancillary office space. Studio spaces that usually cater to artists, designers and small scale production account for c.11% of the space, while specialist laboratory spaces make up 2% of the space.
- 2.12 About half of all workspaces in London are provided through the conversion of existing buildings, in particular older industrial stock including warehouses and loft style buildings which are attractive to digital technology and creative industries. The majority of the workspaces in London offer up to 50 desk spaces per business and will accommodate between five and thirty businesses in total (GLA, 2014).

## Inner and Outer London

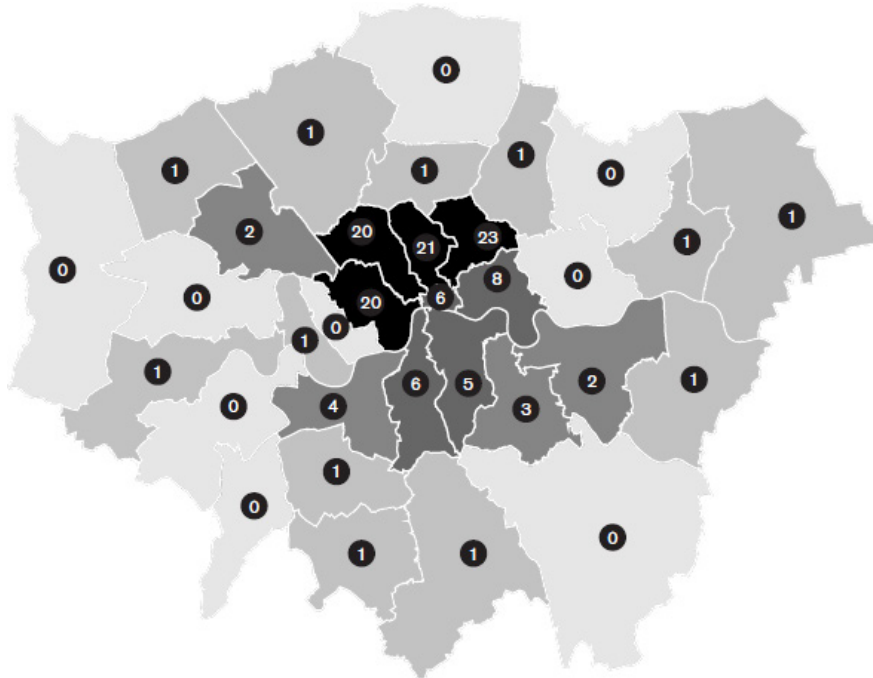
- 2.13 The difference in the scale of workspace<sup>1</sup> provision between inner and outer London is significant, with the majority of all existing provision being located within the Central Activities Zone (CAZ) or CAZ Fringe boroughs. There is a particular cluster of workspace in the inner East London area in the London Boroughs of Islington and Hackney. Figure 4

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<sup>1</sup> Workspaces here referred to are classified in the three main category type the Incubators, Accelerators and Co-working spaces or IAC. These are types of workspaces catering to the SMEs. The figures related to London workspaces are based on the GLA's report on IACs 2014. Detailed definitions of these IACs are provided in the Chapter 3.

indicates that 65% of the workspaces in London are based in the five boroughs. These are Westminster (20), Camden (20), Islington (21) and Hackney (24) (GLA, 2014).

**Figure 3: Distribution of workspaces by borough**



Source: GLA,2014

- 2.14 It should be noted that, as will be shown later, the GLA study does not provide a comprehensive catalogue of all workspaces within London and seems to under-estimate the scale of provision in outer London boroughs in particular. This is most likely a result of a narrow definition of what workspaces were 'eligible' for inclusion in the study and therefore its findings, for the purposes of this Study, should be considered as indicative of general trends.
- 2.15 There are some key differences in the characteristics and features of workspaces between inner and outer London in terms of their focus and operators. Inner London workspaces tend to be operated by private sector, with most having a focus towards industries such as digital technology, communications and media sector. In outer London workspaces are more dependent on public sector such as local authorities, charities and other third sector bodies and have a much wider occupier base.
- 2.16 The GLA study found that workspaces in outer London have a positive impact on their surrounding area, helping to drive economic and physical regeneration as well as wider socioeconomic benefits, they are also considered to support a wider set of complementary services and functions. Within inner London, where commercial markets are more mature and amenity provision more established workspaces have a lower wider economic benefit beyond the businesses and jobs they accommodate.



- 2.17 Transport accessibility is also a key factor that is likely to impact workspace growth in outer London as their connection with the CAZ will be a key driver for the businesses and the market they operate within. The workspaces located in outer London, although relatively spread out, are usually located in area with the highest PTAL ratings. Any growth in outer London would need to be focussed on areas where there are good public transport links.
- 2.18 Another key difference between the inner and outer London is the affordability, which is also a top priority for a business in choosing their workspace location. It has been observed that high rental and land values in Inner London have tended to drive workspace growth in outer London as businesses and operators are 'priced out'. However, this is not a driver for all locations; factors such as infrastructure provision and upgrades will be vital in determining where workspace may move to, both in terms of its general connectivity but also back to other economic and amenity hubs. Investment in infrastructure upgrades will usually tend to attract businesses and raise investor confidence along with bringing a change in the demographics in the area.

### Lessons for Haringey

- 2.19 A number of lessons can be drawn from the above analysis for Haringey illustrating key drivers or pre-conditions for workspace growth in the borough. These are:
- Market being 'squeezed outwards': With increasing development pressure on Haringey's neighbouring inner London boroughs like Camden, Islington and Hackney, along with a reliable/ direct connectivity to the CAZ Haringey could draw more business activity given its amenities and lower values. The strategic positioning of Haringey can be a major driver for attracting new investment and workspace opportunities in the borough.
  - Cost Sensitivity: Haringey has competitive land values compared to its neighbouring workspace hotspots that can encourage and draw businesses to its more affordable offer,
  - Sector Specific: It is equally important for Haringey that its workspaces match the market opportunity, which in turn is driven by character of an area, its economic assets and its connections. The workspace provision has to have a strong correlation to the industry and sectors that it is catering for.
  - Relates to 'place': Workspaces are integrated into their surroundings, therefore scale and character of a place influences its success. Most successful workspace locations in London are the ones that integrate not only in terms of their physical offer but also by how they complement their wider economy through its service offerings. Workspaces should therefore align with Haringey's wider context.
  - Shifting economy not 'viable': Growing workspace in peripheral locations can require public support to cover its set up costs, but the trends suggest that it usually

becomes sustainable overtime. This indicates the public funding or institutional support may be required to overcome viability issues in Haringey.

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## 3. Defining Workspaces

- 3.1 This section explores definitions and characteristics of different types of workspaces and key factors and parameters that determine their existence, particularly in the context of London.

### Workspace Typologies

- 3.2 The growth in the level of demand for managed workspace, the broadening of the range of locations which businesses are prepared to consider locating in and the shift in the scale of activity within traditionally more niche sectors have introduced a wide range of providers to the London market.
- 3.3 At one end of the spectrum the 'traditional' general corporate workspace providers have remained, providing what is generally mainstream office and light industrial spaces. At other end, Higher Education Institutions are increasingly providing highly specialised spaces that encourage the commercialisation of their research capabilities either through direct spin out activity or by encouraging greater levels of interaction with business.
- 3.4 Between these two lie a variety of actors that provide a large mix of spaces, with non-profit organisations, specialist commercial businesses and large corporates all funding, delivering and managing workspaces. What is common across all actors is the increasing specialisation in terms of the management structure. Whilst the GLA estimate that the majority of workspaces outside Central London are supported by the public sector a much lower proportion are operated by them. In essence, where traditionally a local authority's economic development team may have managed a property, the service is now sub-contracted to a specialist operator.
- 3.5 This reflects the increasing demands of businesses on their workspaces, the increasingly specialist nature of the space itself and the wider network within which it operates. These require a management structure that is embedded within the sector full time and understands the particular requirements of the businesses within it. This knowledge of the sector is vital for the credibility of the offer, ensuring it is delivering what businesses demand.
- 3.6 The understanding of business and sector functionality is also vital for establishing and maintaining a wider network of supporting partners. This wider 'eco-system' is vital in a number of sectors, particularly where activity is based on innovation but also where there are wider 'social' aims such as promoting economic opportunities and assisting new business start-ups.
- 3.7 Whilst the market is complex it is possible to begin to organise and categorise the type of provision and wider requirements by provider type. No categorisation is perfect and there are overlaps and areas where providers may do more than one thing, however this
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approach helps to structure the understanding of the sector to identify future opportunities.

**Table 1: Workspace Typology**

Owner / Operator	Corporate	General Commercial & Entrepreneur	Cooperative / Non-Profit	Specialist Commercial	Institutional
<b>Example operators</b>	Regus, Central Working	Workspace, Trampery	Bathtub2 boardroom	Google, Maklab	Higher Education Wellcome Trust
<b>Level of Service</b>	Administrative	Administrative, Networking, Support	Administrative, Networking, Support, 'Leisure'	Specialist facilities & equipment, Investment, Support	Specialist facilities & equipment, Investment, Support, Academic input
<b>Types of Space</b>	Cellular units and suites, open plan	Cellular units and open plan	Cellular units and open plan	'Lab' space, cellular office, open plan	'Lab' space, cellular office, open plan
<b>Building Types</b>	New and refurbished	New and refurbished	Refurbished	New	New
<b>Area Context</b>	Established market	Growing market	Peripheral	Growing and established markets	HE locations, established markets
<b>Typologies</b>	<b>Serviced office, light industrial, live-work</b>	<b>Managed workspace, studios, co-working</b>	<b>Managed workspace, studios, co-working, live-work</b>	<b>Incubator, accelerator, co-working</b>	<b>Incubator, accelerator</b>
<b>Business Maturity</b>	Established	Established and start up	Start up and established	Pre-start, start up and growth	Pre-start, start up and growth
<b>Sectors</b>	Professional, business and financial services	Professional services, creatives	Creative, artist, third sector	Technology, life science, creative	Technology, life science, design, engineering
<b>Examples</b>		Westbourne Studios Mill Co Project	Acme Studios, Dominion Housing,	Google Campus, Level 39	Crick Institute, Bioscience Incubator

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- 3.8 As highlighted within **Table 1** there is a broad potential range of workspace typologies that could be brought forward within Haringey. The type of provision that is most appropriate in a location will depend on a number of factors, principal amongst these are those related to the economic and institutional landscape, the 'eco-system' in place (or that can be delivered) to support activity, the nature of the built stock and the relationship of each potential site to transport infrastructure (and the onward connections that infrastructure provides).
- 3.9 Understanding the relationship between these location factors and the workspace types can, in combination with the cluster analysis in the next section, provide the basis for identification of where specific typologies could be successfully delivered.
- 3.10 The remainder of this section considers each of the workspace types in turn, exploring in more detail the site specific requirements for each to provide a framework for future delivery. However, we do not present an assessment of the general commercial space typologies of B1a office and B1c/B2 industrial premises, which are dealt with within the Employment Land Review. The market for these types of space is well established with the core site drivers being linked to accessibility and the availability of good quality premises.
- 3.11 It is our understanding that, in the short to medium term, the office market is not sufficiently established within the borough to support significant scale standalone office development. Delivery is likely to be orientated towards local professional service activity and therefore principally focussed on existing town centres and transport hubs from where clients and markets are easily accessed.
- 3.12 The industrial market is well established, orientated in the main in locations where there are strong road links and access points. The nature of development and change happening and planned within Haringey suggests that the pattern of land supply will not change; as such we would expect the distribution of industrial activity to remain focussed in existing locations.
- 3.13 Outside of these 'standard' typologies there are multiple opportunities for new types of workspace to be delivered.

## Managed Workspace

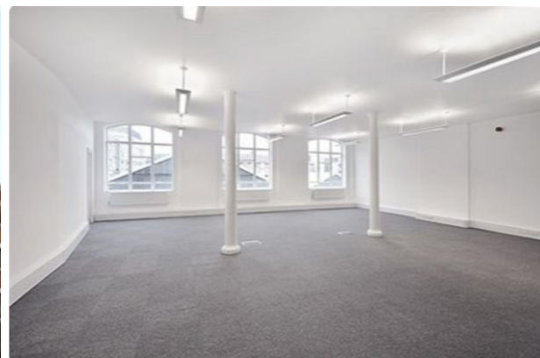
- 3.14 The delivery of managed workspace could potentially accommodate a range of spaces, from small office suites through to workshop and studio spaces. The principal focus of these spaces is on providing more formal, individual spaces for small and start-up businesses with a number of shared facilities such as meeting rooms and reception services.

3.15 Key site/location requirements are:

- Require locations which have established economic activity – business seek to ‘co-locate’ so proximity helps the centre attract occupiers and become commercially viable;
- Need accessible locations – so clients area able to access businesses, and businesses are able to access core market areas. Locations with high PTALs are preferred, particularly where these link back to the CAZ;
- Seek to benefit from wider service and amenity provision – therefore tend to be close to town centres or larger business parks where a critical mass supports wider offer;
- Work within refurbished spaces – but this needs to be of good quality, be sub-divisible and able to provide a good specification fit out;
- New build in established locations – providers deliver bespoke spaces in locations where demand is highest to maximise viability;
- Spaces that provide a high quality working environment – with a professional central core, reception, naturally lit units and spaces;
- Can be located within mixed use neighbourhoods – particularly in dense urban areas such as Haringey. Vertical mixing tends to be less attractive as businesses seek a ‘business’ address. In town centre environments some vertical mixing is possible but would limit the offer to office or studio based activity.

3.16 Depending on any sectoral focus it is likely managed workspace provision would seek to locate in areas with a ‘character’ that matched the nature of businesses. Therefore creative or media orientated workspaces (for example) may seek locations which are gentrifying but maintain some sense of ‘edginess’.

3.17 Managed workspace such as the Pill Box (Bethnal Green) or Southbank House (Vauxhall) are located within mixed use areas that have a significant commercial floorspace presence but also lie in close proximity to a range of residential neighbourhoods.



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## Studios

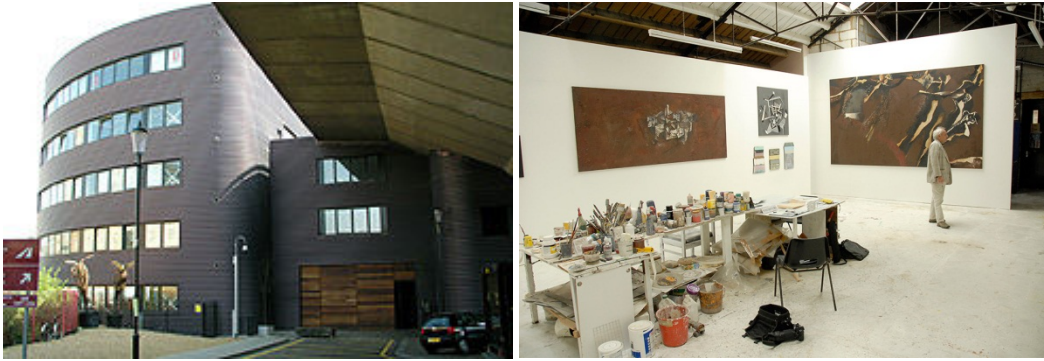
3.18 Studio workspaces can also be operated as standalone, individually occupied units within a range of settings. Traditionally these have come forward in locations with an industrial heritage given the building types these locations provide.

3.19 Key site/location requirements are:

- Secondary locations – where values are low. Depending on the studio use this may require an 'industrial' location to avoid adverse impacts on neighbours, however artist and media production studios may be less restricted;
- Serviced locations – where goods and equipment can be easily delivered to and within a site via light goods vehicles;
- Seek to benefit and connect to wider networks – therefore transport links to core locations (e.g. Soho, Hackney etc) are key, as are links to good quality, animated residential neighbourhoods;
- Work within new or refurbished spaces – dependent on the nature of activity, production/media businesses will seek higher quality (potentially new) space whilst artists may require lower quality secondhand space;
- Space that is customisable – activities and therefore space requirements are varied, therefore a 'standard' product is not suitable to meet needs. Spaces should therefore be a basic shell and core to enable bespoke fit out;
- Large, open spaces – most activities require spaces that provide appropriate scale (height and floorplan) to accommodate large equipment or other installations, artist activity will require natural light;
- Can be located within mixed use neighbourhoods – if uses are compatible (i.e. do not have noise or pollutant impacts) then occupiers seek mixed use locations which can provide animation, however vertical mixing is unlikely to be attractive.

3.20 Businesses in these spaces are drawn to locations that have a wider network and culture of creative activity and vibrant non-work environment. Spaces such as Westbourne Studios and Acme Studios provide space for a range of businesses and artists in predominantly residential locations, but close to high street or town centre environments.





## Maker Spaces

3.21 As London's economy diversifies there is an increased demand for 'Maker Spaces', where small and start-up businesses are able to go to access modern equipment and tools for producing prototypes and small batches of products. These tend to operate on membership based models with the majority of workspace provided through co-working, however some small individual units could provide anchor tenants and increased (secured) income stream.

3.22 Key site/location requirements are:

- Provision of a large shared space which accommodates a range of tools and production machinery – includes 3D printers, laser cutters, milling machines etc alongside work benches and stations, reducing access costs to new businesses and entrepreneurs;
- Capacity for work bench and other dedicated workspaces - for businesses to base themselves within the centre and co-working spaces that can be used alongside the equipment;
- Large, open spaces – most activities require spaces that provide appropriate scale (height and floorplan) to accommodate large equipment or other installations, artist activity will require natural light;
- Work within refurbished spaces – tend to be of lower specification/fit out levels given the nature of activity;
- Require connectivity to residential locations – as early stage start-up businesses most entrepreneurs will seek to locate close to home where possible to reduce costs. Co-location and integration with mixed use (residential) areas is therefore possible;
- Transport access to support providers and wider networks – good links to education, business support, engineering and design services are critical;
- Seek to benefit from wider service and amenity provision – therefore tend to be close to town centres where a critical mass supports wider offer;

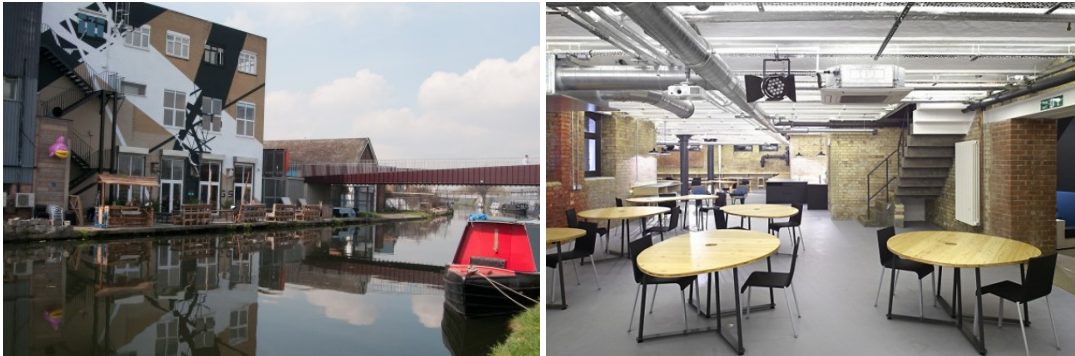
- 3.23 Businesses in these spaces are drawn to locations that have a wider network of likeminded or complementary businesses/individuals and a wider culture of creative activity.



## Co-working

- 3.24 A shift in the inter-relationships between new 'cutting edge' technology applications in different sectors have begun to break down the traditional barriers between businesses, particularly at start up stage. As businesses increasingly collaborate within and across disciplines, and the costs of commercial floorspace rise, co-working and shared workspaces are becoming increasingly common.
- 3.25 Co-working spaces tend to provide shared 'office' type environments in large open plan floorplates where members can either access desks for a period of time or rent a permanent desk space. There are usually 'private' meeting spaces and quiet work areas within the space provided.
- 3.26 Key site/location requirements are:
- Large, open floorplate stock – to provide the core workspace;
  - Work within refurbished spaces – where these can provide appropriate floorplates and be refurbished to a good standard. Require little internal works or subdivision;
  - Require connectivity to residential locations – as early stage start-up businesses most entrepreneurs will seek to locate close to home where possible to reduce costs. Co-location and integration with mixed use (residential) areas is therefore possible;
  - Work best in locations which have established economic activity – business seek to 'co-locate' so proximity increase networking opportunities. Also provides the profile for business, whilst saving cost;
  - Can occupy mixed use buildings – uses are compatible with non-employment activity but would most likely require separate access;

- Can be located within mixed use neighbourhoods – uses are compatible with other activities and workspace can benefit from mixed use locations the amenities and animation these provide.
- 3.27 Provision of co-working space within Hackney Wick (such as 90 Main Yard) shows co-working space can be successful within industrial areas whilst the models provided by Workspace Group (Islington) and Bathtub2boardroom (Haggerston) are more closely integrated into mixed use locations that combine some commercial provision with residential.



## Incubators & Accelerators

- 3.28 Incubators and accelerators are focussed start up and small business centres that are directly linked to the activities of higher education institutions with a priority on the commercialisation and spin out of activity from academic research.
- 3.29 Generally incubator spaces provide some small business space alongside shared resources and facilities, often equipment that is prohibitively expensive to start-up businesses. Space would be let to university spin out businesses, businesses with a similar research/product development focus or R&D departments of large firms who work closely with the university research capabilities.
- 3.30 Outside of the physical provision the incubator would provide a range of support services for businesses, potentially with access to university expertise and also venture capital funding.
- 3.31 Key site/location requirements are:
- Proximity or direct access to HE institutions – to provide the source of business activity and expert support;
  - Strong accessibility – to central London and student locations;
  - Purpose built, high specification space – that is fitted out with high quality equipment and, often, lab spaces;

- Can operate in mixed use environments – although require high profile, high quality and accessible context in a ‘business’ environment;
- Limited vertical mixing – specialist activities make mixed use buildings (beyond other research activity) unlikely.

3.32 A new location for an incubator or accelerator will need to primarily provide good access and/or proximity to core research activities of higher education and business networks within the relevant sector. As such, activity is not ‘footloose’ and has very clearly defined search parameters.

3.33 Examples such as the Queen Mary’s University incubator and the Crick Institute demonstrate that major incubator and accelerator space can be integrated into an existing, mixed fabric. However, these tend to have large scale commercial and institutional activity as the main focus, with residential provision more secondary.



## Live-Work Units

3.34 Increased entrepreneurialism and engagement within the arts and creative sector alongside increasing house prices are driving new demand for combined residential and commercial space. Live-work provision has grown in popularity and now is an important component of London’s small business orientated economic landscape.



3.35 Currently provision is ‘ad-hoc’ and (at best) semi-regulated however new, purpose built stock is being developed across London. Key site/location requirements are:

- 
- Connectivity to amenities residential locations – as places to live people will seek access to a range of services/amenities, proximity, co-location and integration with mixed use (residential) areas is therefore preferred;
  - Range of provision options – can be located within conversion premises, particularly where the business activity requires workshop space, older industrial buildings are the most common type of conversion. New build stock tends to be focussed on providing office space in particular;
  - Vertical mixing potential – can be fully integrated into residential buildings with limited need to provide separate access. Workshop type live-work may require ground floor loading access.
- 3.36 The challenge for live-work activity is the long term management of the 'work' element, with a number of modern schemes essentially evolving to be alternative residential provision. It may be necessary therefore to provide live-work units on a managed basis rather than allowing them to be sold on the open market, which would enable the landlord to retain control of activities.
- 3.37 Live-work activity is likely to be sensitive to change. Much of the current activity within Haringey is unplanned or regulated, which appeals to a certain type of occupier, particularly given the lifestyle the industrial stock offers. However, if the provision becomes more planned and delivered through new build there is a danger that the economic value of the current uses could be lost. Sensitive reprovision will be required to best manage this process.

## Conclusions

- 3.38 Overall, it is clear that, in delivering future workspace there are a wider set of considerations that need to be taken into account to help ensure the space provided will be a success. It will be vital that the workspace works with the economic trajectory of the area within which it sits and complements surrounding activities to support a wider business network.
- 3.39 Provision can take a number of forms, with opportunities to reuse existing good quality buildings but also deliver bespoke new builds. This provides a wider opportunity to co-locate workspace with a range of other employment and non-employment generating activities. Indeed, in many cases the proximity to leisure and retail activity and residential communities are beneficial to the success of the workspace
- 3.40 In the next section we consider the strategic attributes of employment clusters within the borough and identify where these are beginning to align with opportunities to deliver particular workspace typologies.

## 4. Review of Haringey Provision

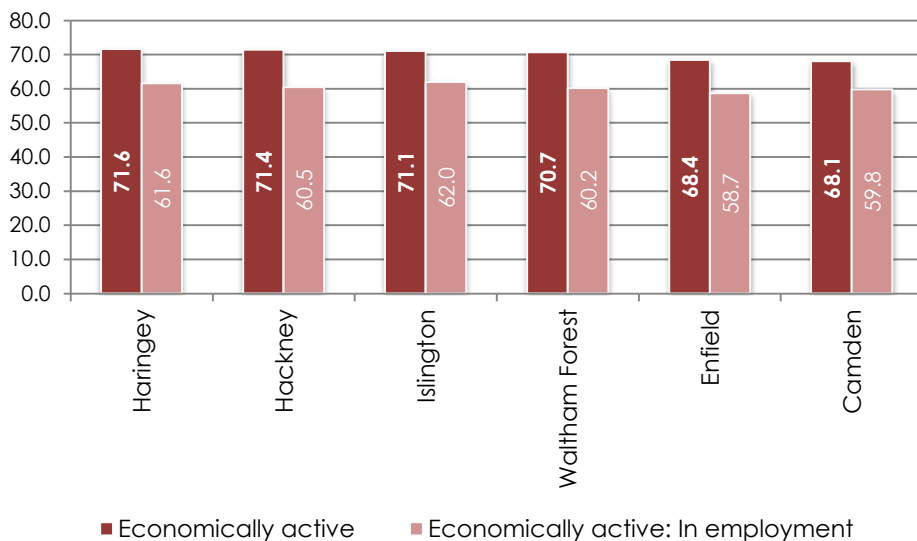
4.1 The following section presents a comprehensive review of potential workspace location and existing provision in Haringey. It considers key aspects such as - labour market and employment land profile; assesses current distribution of workspaces in Haringey; provides a detailed analysis of site profile; and analyses key workspace drivers thereby providing recommendations for potential future workspace opportunity in Haringey.

### Snapshot of Labour Market profile and Employment Land Distribution

4.2 **Transient Population:** Haringey is home to 254,926 people living in an area of 30 sq km (2011 Census).It has relatively transient population. At the time of the 2011 Census, there were 64,000 migrants <sup>2</sup>in the borough, the 7th highest in London.

4.3 **High Economic Activity and Employment Rate:** Figure 4 shows that in 2011 the economic activity rate (71.6%) was highest in Haringey compared to its neighbouring boroughs. It also had the highest proportion of population employed (61.6%).

**Figure 4: Economic Activity and Employment-2011**



Source: ONS, 2011

4.4 However, these labour market conditions mask underlying issues in terms of the levels of local employment activity and also the skills available within the resident workforce to meet the requirements of new and emerging economic sectors. Whilst activity is

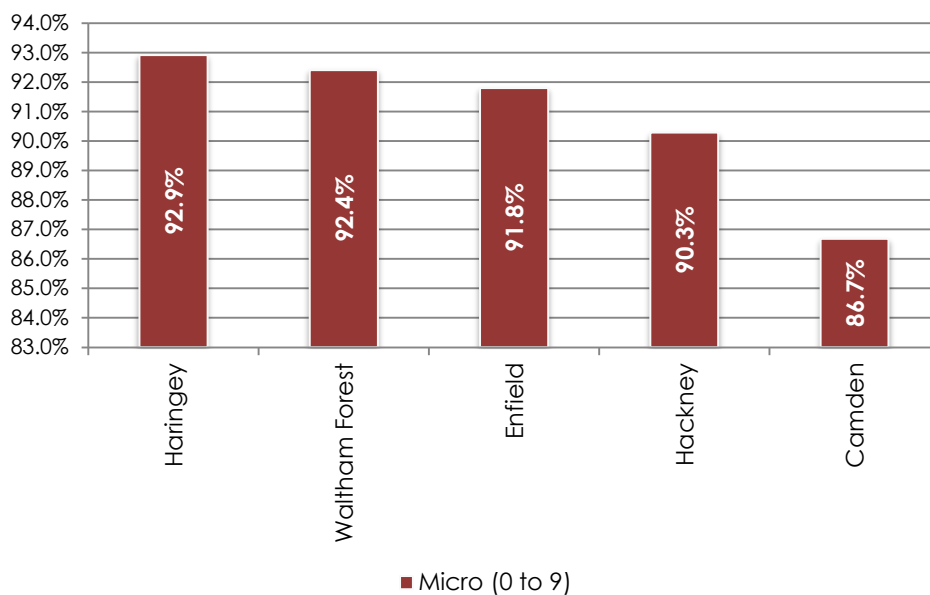
<sup>2</sup> Non UK citizens

relatively high in general there are significant areas with poor engagement levels or a dominance of low skilled activity that could act as a restraint on future business formation.

4.5 The major sectors of employment in Haringey are public administration, education and health (28%) and distribution, hotels and restaurants (including retail) (26%). Manufacturing and construction account for 12% of all employment. This highlights the relatively low skilled nature of the resident workforce, with a likelihood that many residents will be unable to access opportunities in knowledge based sectors.

4.6 **Dominance of Micro Enterprises:** Smaller businesses are responsible for a much larger proportion of total employment than in other neighbouring borough (as shown in Figure 5). Haringey’s economy is dominated by small businesses. Over 90% of the businesses employ 10 or less people; this particularly a supportive statistic for workspace provision in Haringey as micro enterprise are an important driver for workspace industries. This is indicative of a strong small enterprise economy which is the key target group that most workspaces cater to.

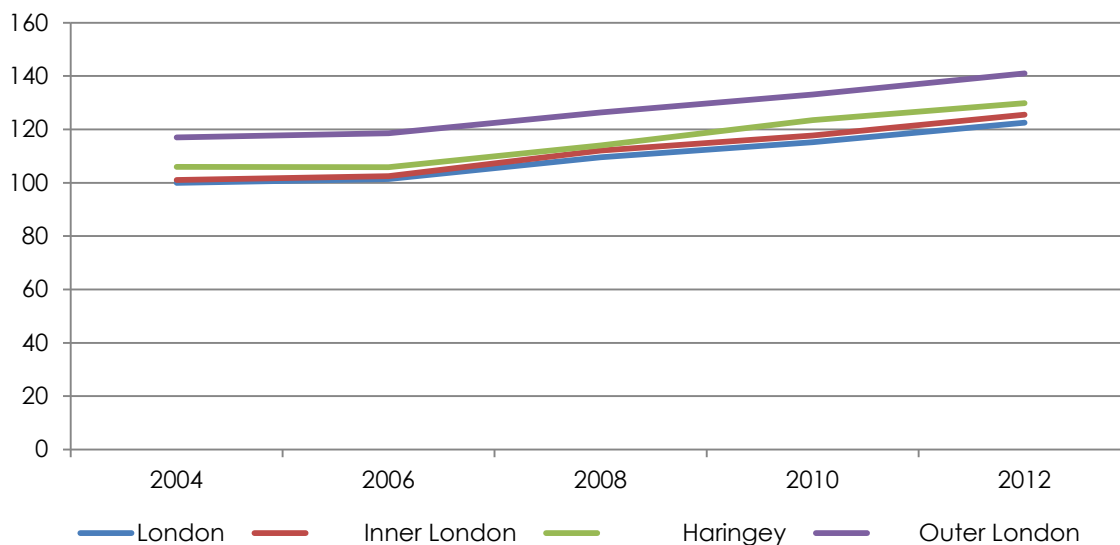
**Figure 5: Share of micro businesses in Haringey-2014**



ONS, NOMIS, 2014

4.7 It should be noted that the data includes all small businesses, and includes those within the retail and leisure sector, that are unlikely to occupy B class workspaces.

4.8 **Enterprise Trends Closer to Inner London:** Haringey has seen 22% increases in active enterprise from 2004-2012. In 2004, the total count of active enterprise in Haringey was 8,435; after which it grew and then temporarily declined to a count of 9,075 during the recession phase of 2008, reaching 10,330 enterprises in 2012. This growth rate of enterprise in Haringey is faster than that of London. However, Figure 6 shows that when compared with Inner and Outer London enterprise trends in Haringey is more close to Inner London boroughs than outer.

**Figure 6: Active Enterprise in Haringey**

Source: ONS Business Demography 2008-2012

- 4.9 This trend suggests that there are opportunities for the future enterprise activity mix to be driven more closely towards an 'inner London' scale and type of offer. This would provide a greater mix of activities and a range of new employment opportunities for residents.
- 4.10 **Employment Land Supply:** In terms of employment land, the borough retains concentrations of designated employment in industry, offices and warehousing. It contains 133 hectares of employment land, over 1,000 buildings, 722 business establishments and nearly 736,000m<sup>2</sup> of employment floorspace. It also contains other smaller employment locations which total a further 16.6 hectares of employment land (ELR, 2012). This provision is currently being reviewed in a separate study.
- 4.11 **Employment Land Demand:** Haringey ELR 2012 update demonstrates that overall B class floorspace demand will increase by 125,529 sqm over the period of 2011-2026, translating to a range of approx. 21 Ha to 23.7 Ha of land; B1 floorspace demand will grow by 11.8 Ha; B8 by 12 Ha, while demand for B2 floorspace is projected to decline by 2.7 Ha. This is indicative of a strong office and warehouse based sector growth. The forecast is particularly supportive of workspace expansion in Haringey as most suitable workspace types for Haringey fall under class B1 and B8 classification.
- 4.12 Demand projections are currently being revised in the new Employment Land Review. We understand that the initial outputs suggest a broadly similar pattern and scale of growth will be appropriate in the future, albeit with a considered proportion of employment coming forward in B1 use class activities. Given the current focus within the borough we would anticipate that this will require a need stock of smaller business workspaces that contain office and work shop (light industrial) spaces.



## Summary

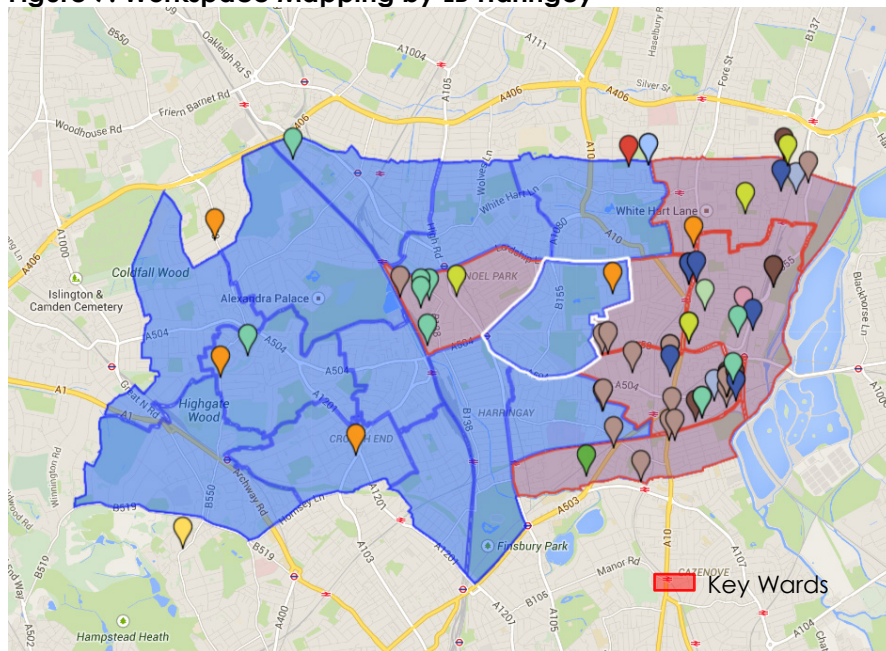
4.13 The above indicators show that Haringey has a robust economy to attract businesses and investment in the borough that can support workspace investment. It has a high economic activity and employment rate compared to its neighbouring boroughs, however there are underlying issues with the nature of activity and the skills of residents/ The borough also has a transient population offering a diverse demographic and strong labour market pool. Much of the population is engaged in small enterprise employment, an indicator of a strong small enterprise economy which is the key target group that workspaces cater for. The employment land forecasts in the borough support a mix of B1 and B8 class of workspaces which is aligns with the potential offer of new workspaces.

## Workspace provision in Haringey

4.14 Haringey Council, as part of its on-going commitment to improve social and economic opportunities for small and medium enterprises has undertaken workspace mapping to capture location of workspace and types within the borough. This mapping identifies 68 key managed workspaces in Haringey across nine wards. Figure 7 shows the distribution of these workspaces across the borough.

4.15 The majority workspaces are concentrated in the East of the borough in the wards of Tottenham Hale, Tottenham Green, Northumberland Park, Seven Sisters and Bruce Grove along with some concentration in Wood Green in Noel Park ward (as shown in the Figure 7).

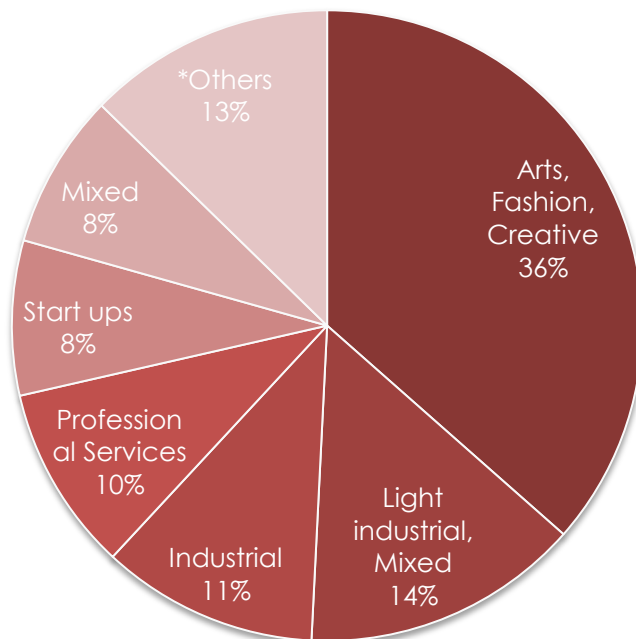
**Figure 7: Workspace Mapping by LB Haringey**



Source: LB Haringey, 2014

- 4.16 It should be noted that this 'local' mapping exercise identifies a much greater level of provision than the GLA's London wide mapping exercise. To a large degree this is a result of the research methodologies used, with the GLA definition focusing on workspaces that are set up to increase networking and co-working opportunities rather than simply provide small business space, as such it filters out a large number of facilities that others may consider SME workspace.
- 4.17 Haringey's workspaces accommodate a wide range of sectoral activity. The highest share of workspace occupiers come from the arts, fashion and creative industry sector, occupying 34%<sup>3</sup> of spaces.
- 4.18 Light industrial (14%) and industrial (10%) workspaces also represent a significant proportion of provision, with a further 10% being used for professional services activity.

**Figure 8: Sector Mix in Haringey**



Source: LB Haringey, 2014

- 4.19 Occupancy in the remaining 40% of units is mixed. A relatively small proportion of workspace units are directly addressing start up business needs. Of the 13% of units that fall into the 'other' category there are a range of activities accommodated including: Food/ Catering (3%); Automotive (1%); Health (1%); IT, Science and technology (1%); Legal (1%); Light Industrial (1%); Business Incubator (1%).
- 4.20 **Summary:** The above analysis shows that there is a strong workspace concentration in the East of Haringey mostly concentrated in Haringey Heartlands and Wood Green and

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<sup>3</sup> This is a unit based analysis.

in Tottenham area (in North Tottenham, Tottenham Hale and South Tottenham and along the high street). This indicates a strong cluster and SME related economies in this area. Most dominating sector for workspace in Haringey is Arts, Fashion and Creative industry indicating a strong presence of SMEs in this area. It's share is equal to the second most dominating sector Light industrial mix, Industrial, and Professional Services combined.

## Site and Cluster Analysis

- 4.21 The above section shows that there is already a solid base of workspace provision within Haringey, indicating there is strong potential for workspace development in the future. To explore this further, the following section reviews 15 key sites in Haringey<sup>4</sup> and sets out their context and current provision in order to understand which may be suitable for future workspace provision and the appropriate form this may take.
- 4.22 To complete this analysis we have employed a range of research techniques. Each site has been visited by the project team along with officers from LB Haringey to understand conditions on the ground. This was further supplemented by desk based research to understand in detail the nature of existing activities within each location as well as the planning and regeneration policies that influence how the area may change.
- 4.23 Once each location had been surveyed, a series of four geographic clusters and sub-clusters of sites were identified which had similar characteristics and offer to businesses. The analysis of each cluster is presented in the remainder of this section. At the end of each site review we have identified key workspace drivers that will influence the future workspace offer of each site sites based on our analysis.
- 4.24 The site analysis presented in this section considers:
- Sites and Existing Workspaces: Site names and existing workspaces<sup>5</sup>
  - Location Characteristics: Wards and Public Transport Accessibility Levels (PTAL)
  - Planning Designations: Relevant London and borough wide planning policy designations.
  - Estimated Capacity: Provides estimated capacity for different use types based on Haringey's planning policy documents.
  - Predominant existing use and property type: Based on the site visits, desktop research and the workspace mapping by LB Haringey.

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<sup>4</sup> These sites were a part of the brief provided by LB Haringey and are based on their previous research of existing opportunities.

<sup>5</sup> Based on the workspace mapped by LB Haringey (2014).

- Sites and Surroundings: Describes the key features and characteristics of the site and its surroundings.
- Building Stock: Overview of the stock quality in the area.
- Access Infrastructure: Public transport connections.
- Regeneration and Change Indicators: Major planned changes and regeneration features of the area. Also summarises operators and occupiers in the area that are likely to have an impact on workspace types.
- Development Constraint: Issues that can pose a potential constraint to development on the site.
- Potential future workspace types based on the Table 1, Chapter 3 defining matrix typology.

### Cluster Analysis and Recommendations

4.25 Based on location, sites have been classified into 4 main clusters as shown in

4.26 . The clusters are based on the proximity of sites, common transport infrastructure, and current and proposed policy designations. The sites are primarily employment sites with most already holding workspace activities within.

**Table 2: Workspace Clusters**

Cluster	Sites
1	<ul style="list-style-type: none"> <li>• Haringey Warehouse District</li> <li>• Greater Ashfield Road</li> </ul>
2	<ul style="list-style-type: none"> <li>• Haringey Heartlands</li> <li>• Wood Green Metropolitan Town Centre</li> </ul>
3	<ul style="list-style-type: none"> <li>• North Tottenham- Brantwood Estate</li> <li>• High Road West</li> </ul>
4	1. Cluster 4a- High Road Corridor
	2. Cluster 4b- Tottenham Hale and South Tottenham

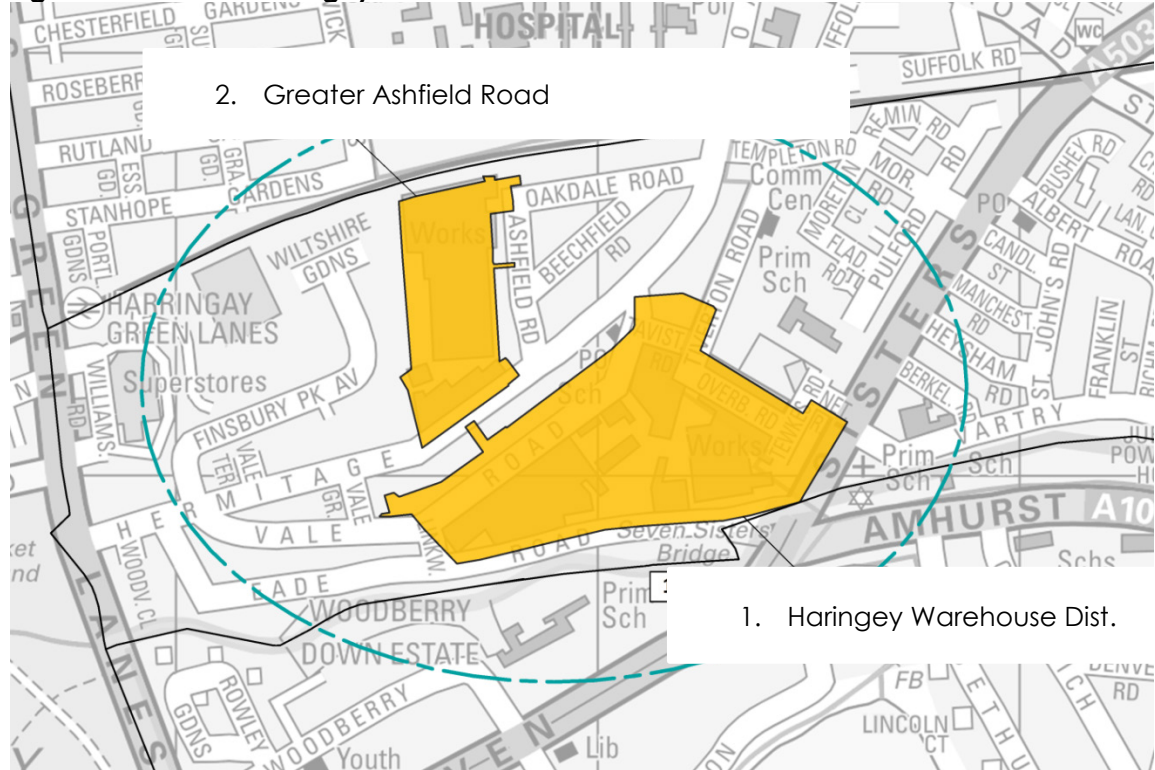
4.27 Based on our understanding of the clusters, their context and key drivers we identify the workspace typologies that are likely to be most appropriate within each cluster over the plan period.

### Cluster 1

4.28 Located to the south of LB Haringey in the Seven Sisters Ward, Cluster 1 has two areas-the Haringey Warehouse District (Area 1), and Greater Ashfield Road housing Arena, Crusader and Omega Industrial Estates (Area 2) as shown in Figure 9. The areas are in

close proximity to each other and are bounded by Green Lanes Road to the West and over ground line to the North. New River flows to the south. The following table provides further details to the site.

**Figure 9: Cluster 1- Haringey Warehouse District and Greater Ashfield Rd.**



Source: LB Haringey


<p><b>Sites (Identified Workspaces)</b></p>	<ul style="list-style-type: none"> <li>• <b>Area 1-Haringey Warehouse District</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Area 2: Greater Ashfield Rd (inc. Arena + Crusader+ Omega Industrial Estate)</b></li> </ul>
<p><b>Location Characteristics</b></p>	<ul style="list-style-type: none"> <li>• Location Ward: Seven Sisters.</li> <li>• PTAL Rating between 2-3</li> </ul>	<ul style="list-style-type: none"> <li>• Location Ward: Seven Sisters.</li> <li>• PTAL rating between 1-2</li> </ul>
<p><b>Planning Designations</b></p>	<ul style="list-style-type: none"> <li>• Seven Sisters Corridor (Local Plan: Strategic Policies 2013)</li> <li>• Local Strategic Industrial Site 16 (Local Plan: Strategic Policies 2013)</li> <li>• Site Specific Proposal 16 (Unitary Development Plan 2006)</li> </ul>	<ul style="list-style-type: none"> <li>• Seven Sisters Corridor (Local Plan: Strategic Policies 2013)</li> <li>• Local Strategic Industrial Site 16(Local Plan: Strategic Policies 2013)</li> <li>• Site Specific Proposal 17 (Unitary Development Plan 2006)</li> </ul>

	<ul style="list-style-type: none"> <li>• Green Lanes District Centre</li> </ul>	<ul style="list-style-type: none"> <li>• Site Specific Proposal 29 (Unitary Development Plan 2006)</li> <li>• Ecological Corridor</li> <li>• Site of Important Nature Conservation (Borough Grade II)</li> <li>• Green Lanes District Centre</li> </ul>
<p><b>Predominant existing use and property type</b></p>	<ul style="list-style-type: none"> <li>• Haringey Warehouse District is currently a large area in mixed use, with some industrial units being converted over time into informal, unapproved live-work, as well as purely residential accommodation and continuing employment use. There are four main employment sites:             <ul style="list-style-type: none"> <li>– Florentia Clothing Village, which is in active use as clothing, manufacturing and distribution centre.</li> <li>– Ovebury Road/ Eade Rd east, which is a mix of commercial and residential use, most buildings have partial residential element.</li> <li>– Building between Vale Rd/ Eade Rd, which is in active commercial use.</li> <li>– Area on north of Vale Rd, which is a mix of unpermitted residential use and active commercial uses.</li> <li>– Nos. 341-357 Seven Sisters Road.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• This area is a collection of industrial sites which lie between Hermitage Rd and the Gospel Oak-Barking rail line. There are residential areas to the east, west and south, but due to these sites industrial legacy, connection through and between the sites is poor. To the east and south these are largely Victorian terraced houses, of 2 storey height, with some similar later infill; to the West, houses on Finsbury Park Avenue and Wiltshire Grove are a 1980s development of 2-4 storeys.</li> <li>• The site can be split into three,             <ul style="list-style-type: none"> <li>– Crusader Industrial Estate, with some studio and warehousing facilities in the centre;</li> <li>– Arena Design Centre to the north- mainly used as offices; Sections of Arena Business Centre have been in live/work use for a long period, and a return to</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>There is a major construction site towards Eade Road where currently work is being undertaken by National Grid. A shaft has been constructed for laying cables through a tunnel towards St. Johns Wood. It is a secured site at present. The work is expected to end in 2015, after which most of the site will be recovered for other uses.</li> </ul>	<p>commercial use is not considered likely, and</p> <ul style="list-style-type: none"> <li>Omega Works to the south with some warehouse, distribution, light industrial and some unpermitted residential use.</li> </ul>
<b>Sites and Surroundings</b>	<ul style="list-style-type: none"> <li>The site is surrounded by Eade Road, to the South, beyond its embankment up to the New River, with a path offering open space and east-west pedestrian link on the South bank, but not conveniently accessible to the site.</li> <li>The South Eastern boundary is formed by Seven Sisters Rd. as far as Tiverton Primary School, which along with Tiverton Estate form the North Eastern boundary.</li> </ul>	<ul style="list-style-type: none"> <li>The site is collection of industrial sites which lie between Hermitage Road and the Gospel Oak-Parking rail line. There are residential areas to the east, west and south.</li> </ul>
<b>Building Stock</b>	<ul style="list-style-type: none"> <li>The buildings along Hermitage Road are built stock dating from 1970s most of poor to average quality. Some buildings along Overbury Road are of good quality, however moving down towards the Tewkesbury Road the built stock is of poor quality.</li> <li>Building along Eade Road are large floorplate warehouse stock of mixed</li> </ul>	<ul style="list-style-type: none"> <li>Stock varies. The north of the site has Arena business and design centre which has a stock of poor to average quality. The centre of the site where the Crusader Estate lies has mixed stock ranging with most properties of poor to average and some of good quality.</li> <li>Buildings along Hermitage Road have mostly warehouse built stock dating</li> </ul>

	quality.	from 1970s, most of which are of poor to very poor quality.
<b>Access Infrastructure</b>	<ul style="list-style-type: none"> <li>• Accessibility and public transport proximity: Haringey Green Lanes tube station, Green Lane Road and Seven Sisters Road on the South.</li> </ul>	
<b>Regeneration and Change Drivers</b>	<ul style="list-style-type: none"> <li>• Given to the proximity of the two areas, the regeneration and change drivers have been studied in common and are listed below:           <p><b>Regeneration Drivers:</b></p> <ul style="list-style-type: none"> <li>• Seven Sisters Rd. is a priority area of change for Haringey and has been recognised a strategic corridor, this will result in a range of access and environmental improvements to the area. There are also plans to improve pedestrian and cycle links across the area including East West Connections.</li> <li>• Potential option of reviving connections with North-Eastern side through an unused foot tunnel. Improving public realm and access conditions, opening up connections to residential streets north of the railway including the redevelopment of St. Ann's Hospital.</li> <li>• Potential improvement of public routes including seeking ways to connect Finsbury Park Avenue and Arena Retail to the West.</li> <li>• Rising prices in Hackney and Islington: The area is undergoing considerable change as land values increase in the neighbouring boroughs of Islington and Hackney, and increasing demand for housing spreads into this area, this is likely to bring wider economic benefits.</li> </ul> <p><b>Strong Concentration of Creative Businesses and Existing Use Drivers:</b></p> <ul style="list-style-type: none"> <li>• There is a strong concentration of artists and designers in this area with areas such as Florentia Village and Catwalk Place along Ovebury Road, which have several creative clusters. The creative use of the buildings here is evident from façades that have been redesigned to exhibit their creative nature and use.</li> </ul> </li> </ul>	

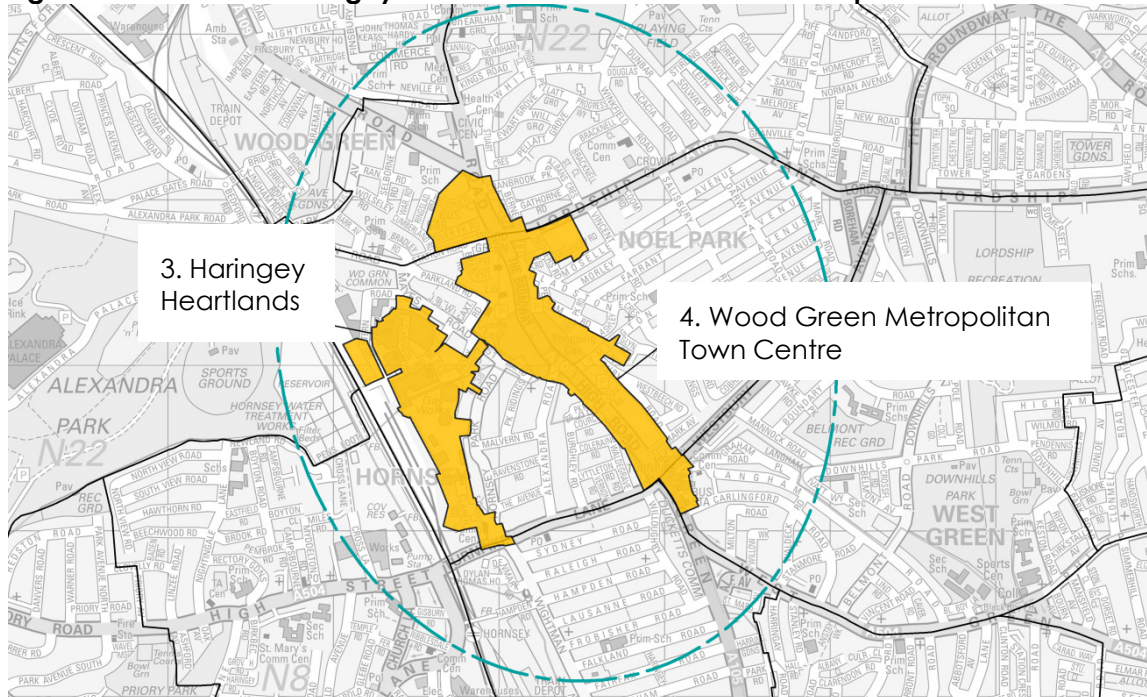


	<p><b>Figure 10: Catwalk Place</b>      <b>Figure 11: Overbury Road</b></p>  <ul style="list-style-type: none"> <li>• Spaces like Limazulu Project Spaces have collection of small studio and art display spaces providing a for the small business creative spaces.</li> <li>• Arena business centre includes the Arena Design Centre which hosts space for small businesses and studio spaces. There are also several small businesses relating to fashion, and recording studios and music.</li> </ul> <p><b>Figure 12: Limzalu Project Space</b>      <b>Figure 13: Arena Design Centre</b></p> 
<p><b>Development Constraints</b></p>	<ul style="list-style-type: none"> <li>• Permeability Constraints- Particular lack of connectivity on the north of the cluster enclosed by railway line. Around Site 2 there are residential buildings to the east, west and south of the site, but due to the sites industrial legacy, connection through and between the sites are poor.</li> <li>• Enforcement Issues due to unpermitted residential use.</li> <li>• Close proximity and relationship to residential</li> </ul>
<p><b>Potential Future Workspace Opportunities</b></p>	<ul style="list-style-type: none"> <li>• Light Industrial</li> <li>• Managed workspace</li> <li>• Studio Spaces</li> </ul>

## Cluster 2

- 4.29 Cluster 2 which is classified into two sub areas for this study is located in Haringey Heatlands (Area 3) and Wood Green Metropolitan Town Centre (Area 4). These areas are, in reality, a collection of smaller sites; Haringey Heartlands includes sites such as Parma House, the Chocolate Factory, Clarendon Square, Clarendon Square Gateway, Land NW of Clarendon Square, Land adjacent to Coronation Sidings.
- 4.30 Area 4 Wood Green Metropolitan Town Centre Wood Green is a busy Metropolitan Town Centre and is the largest shopping centre in the borough. The area is well served by public transport with Wood Green underground station to the North and Turnpike Lane Station to the south. It comprises of sites such as LB Haringey Civic Centre, Arriva Bus Garage, Station Rd Area, Wood Green Library et al, The Mall, Bury Rd Car Park and Turnpike Lane Station.

**Figure 14: Cluster 2 – Haringey Heartlands and Wood Green Metropolitan Town Centre**



Source: LB Haringey

<b>Sites (Identified Workspaces)</b>	<b>Area 3: Haringey Heartlands</b>	<b>Area 4: Wood Green Metro District Centre</b>
	Includes sites <ul style="list-style-type: none"> <li>• Parma House</li> <li>• Chocolate Factory</li> <li>• Clarendon Square</li> <li>• Clarendon Square Gateway</li> </ul>	Includes sites: <ul style="list-style-type: none"> <li>• LB Haringey Civic Centre,</li> <li>• Arriva Bus Garage,</li> <li>• Station Rd Area,</li> </ul>

	<ul style="list-style-type: none"> <li>• Clarendon Rd South</li> <li>• Land NW of Clarendon Square</li> <li>• Land adjacent to Coronation Sidings</li> </ul>	<ul style="list-style-type: none"> <li>• Wood Green Library et al,</li> <li>• The Mall,</li> <li>• Bury Rd Car Park</li> <li>• Turnpike Lane Station.</li> </ul>
<b>Location Characteristics</b>	<ul style="list-style-type: none"> <li>• Location Ward: Noel Park</li> <li>• PTAL Levels range from 4 to 6.</li> </ul>	<ul style="list-style-type: none"> <li>• Location Ward: Noel Park</li> <li>• Excellent Public Transport accessibility. PTAL 6</li> </ul>
<b>Planning Designations</b>	<p><b>Common Designations:</b></p> <ul style="list-style-type: none"> <li>• Haringey Heartlands/Wood Green Opportunity Area (London Plan 2011)</li> <li>• Haringey Heartlands Growth Area (Local Plan: Strategic Policies 2013)</li> <li>• Local Employment Area (Local Plan: Strategic Policies 2013)</li> <li>• Cultural Quarter (Local Plan: Strategic Policies 2013)</li> <li>• Site Specific Proposal 4 (Unitary Development Plan 2006): Haringey Heartlands</li> </ul> <p><b>Site Specific:</b></p> <ul style="list-style-type: none"> <li>• Chocolate Factory- Wood Green Metropolitan Town Centre (Local Plan: Strategic Policies 2013)</li> <li>• Clarendon Square- Extant Planning Permission: Reference HGY/HGY/2009/0503; Blue</li> </ul>	<p><b>Common Designations:</b></p> <ul style="list-style-type: none"> <li>• Haringey Heartlands/Wood Green Opportunity Area (London Plan 2011)</li> <li>• Wood Green Area of Change (Local Plan: Strategic Policies 2013)</li> <li>• Wood Green Town Centre (Local Plan: Strategic Policies 2013)</li> </ul> <p><b>Site Specific:</b></p> <ul style="list-style-type: none"> <li>• LB Haringey Civic Centre- Site Specific Proposal 30 (Unitary Development Plan)</li> <li>• Station Rd Area- Site Specific Proposal 4 (UDP-2006); Area of Archeological Importance.</li> <li>• Wood Green Library et al, and The Mall- Site Specific Proposal 4 (Unitary Development Plan 2006): Haringey Heartlands; Secondary Town Centre Frontage (Unitary</li> </ul>

	<p>Ribbon Network</p> <ul style="list-style-type: none"> <li>• Clarendon Square Gateway Local Employment Area (Local Plan: Strategic Policies 2013); Land NW of Clarendon Square-Local Employment Area (Local Plan: Strategic Policies 2013).; Land adjacent to Coronation Sidings- Local Employment Areas; Ecological Corridor; Article 4: Coronation Sidings</li> </ul>	<p>Development Plan 2006); Blue Ribbon Network</p> <ul style="list-style-type: none"> <li>• Bury Rd Car Park-Wood Green Metropolitan Town Centre; (Local Plan: Strategic Policies 2013); Secondary Town Centre Frontage (Unitary Development Plan 2006).</li> <li>• Turnpike Lane Station-Wood Green Metropolitan Town Centre (Local Plan: Strategic Policies 2013); Primary and Secondary Town Centre Frontages (Unitary Development Plan 2006); Strategic Local Open Land (Unitary Development Plan 2006); Local Shopping Centre (Unitary Development Plan 2006); Historic Park (Unitary Development Plan 2006).</li> </ul>
<p><b>Predominant existing use and property type</b></p>	<p>The area comprises of the following main sites:</p> <ul style="list-style-type: none"> <li>• Parma House</li> <li>– Parma House includes commercial buildings occupied by creative industry, along with large surface parking.</li> <li>– The main existing building is an inter-war former factory that fronts Coburg Road and extends deep into site towards its western edge at Clarendon Road North. Together with Chocolate Factory which adjoins the site to the West, the site forms the core of Wood Green Cultural</li> </ul>	<p>The area is a linear corridor stretching along the High Road and is composed of the following main sites:</p> <ul style="list-style-type: none"> <li>• LB Haringey Civic Centre:</li> <li>– The main building and function on the site is the Council's current Civic Centre, and is in active use. It is used for a number of civic functions including Council meetings and administrative activities. The footprint is relatively small compared to the site as a whole. There is large car park to the rear.</li> <li>• Arriva Bus Garage:</li> </ul>

	<p>Quarter.</p> <ul style="list-style-type: none"> <li>• Chocolate Factory:             <ul style="list-style-type: none"> <li>– This site is a former factory that has been converted by the Workspace Group and provides a creative industry complex, which is a part of cultural quarter; consists of various buildings in the North of the site. The Mountview Academy of Theatre and Arts is housed in an industrial building to centre; three small industrial buildings are used to annex Mountview Academy; Area 51 a specialist education provider for teenager and young adults housed in the industrial building with other community and commercial uses occupying industrial premises. The site also includes land north of Clarendon Road. About 40% of the site is used for surface car parking.</li> </ul> </li> <li>• Clarendon Square:             <ul style="list-style-type: none"> <li>– The site contains derelict land in the south, together with two large operational gas holders, surrounded by a car park and a single storey office in the centre. The northern part of the site also includes the Olympia Trading Estate, a 5,830 m<sup>2</sup> industrial building. The Spine Road is newly built connecting Clarendon Road to the south with Western Road in the north west. East of the gasholders site reaches</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>– This site is in active use as a bus garage and ancillary accommodation, generally equivalent to 2 to 3 storeys in height. The site is owned and operated by Arriva, and by serving as a route end for many bus services contributes to Wood Green's role as a Metropolitan Town Centre.</li> <li>• Station Rd/ River Park Rd:             <ul style="list-style-type: none"> <li>– This site contains the properties of River Park House, Alexandra House, the car park site &amp; taxicab office, 38-46 Station Road, 5 River Park Road, 48 Station Rd, Greenside House (50 Station Road—TBC), 40 Cumberland Road and 13-27 Station Rd. These sites are all in Council ownership,</li> <li>– Most of the properties front Station Road, and most have rear access to River Park Road. They are all currently in active office use.</li> </ul> </li> <li>• Wood Green Library             <ul style="list-style-type: none"> <li>– This site currently consists of the very well used Wood Green Library, the retail arcade behind it (including the Post Office and Cooperative Bank), the Turkish Radio building on Wood Green High Road, the Asian Cultural Centre and mosque on Caxton Road and the derelict site at the</li> </ul> </li> </ul>
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	<p>Hornsey Park Road, and is lined with mature trees,</p> <ul style="list-style-type: none"> <li>• Clarendon Gateway:             <ul style="list-style-type: none"> <li>– The site contains land between Brook Rd., Coburg Rd, Silsoe Rd and Mayes Rd. This site forms part of Haringey Heartland Cultural Quarter along with Parma House immediately north over Coburg Rd, The Chocolate factory to NW and Clarendon Square to the West.</li> </ul> </li> <li>• Clarendon Rd South:             <ul style="list-style-type: none"> <li>– This area contains a number of smaller sites in employment use, but also includes the West Indian Culture Centre. The commercial uses on the site appear to be a mix of industrial, office, and warehousing. Clarendon Rd South runs through the site north south and links the Haringey Heartlands Growth Area with Manor Park Rd, and Turnpike Lane Rd to the south.</li> </ul> </li> <li>• NW of Clarendon South:             <ul style="list-style-type: none"> <li>– The site is bounded by Western Road to west, Coburg Road to the north, and the Clarendon Squaresite to the east and south. The site contains a group of buildings in a mix of active industrial, religious and warehousing units.</li> </ul> </li> <li>• Land adjacent to Coronation Sidings:</li> </ul>	<p>corner of Caxton Road and Mayes Road. The Library building is in very poor condition, although structurally sound, presents a poor face to the busy town centre.</p> <ul style="list-style-type: none"> <li>• The Mall:             <ul style="list-style-type: none"> <li>– The site is currently known as The Mall (formerly known as Shopping City), and represents the focal point of Wood Green Town Centre. It's urban form dominates the local landscape, and can be imposing when walking through the area. Footfall around this part of the High Road is high, but circulation can be constricted due to a lack of accessible public realm.</li> <li>– The site is in town centre use, offering a number of retail outlets, as well as food and drink, and a cinema. Above the retail uses are car parking, office and residential uses.</li> </ul> </li> <li>• Bury Road Car Park:             <ul style="list-style-type: none"> <li>– This site is located on Bury Road, just north-east of Wood Green High Road and is within the Metropolitan Town Centre.</li> <li>– The site extends to its corner with Lymington Avenue and to a path (open to the public) along the back of buildings that face the High</li> </ul> </li> </ul>
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	<ul style="list-style-type: none"> <li>- The site is currently a railway embankment to the Great Northern railway line. The site is bounded to the south by Penstock Footpath a pedestrian and cycling route, a continuation of Coburg Rd tunnels under the railway and connects Wood Green and points east to Hornsey High Street, Alexandra Park and districts to west. To the site is bounded by Wester Rd. with Chocolate Factory site opposite.</li> </ul>	<p>Road. It does not have a High Rd frontage, but does have some retail frontage on Lym-ington Avenue. Retail units on the High Road (outside of this site) have service access and flats above the shops have their front doors off this path.</p> <ul style="list-style-type: none"> <li>• Turnpike Lane Station:             <ul style="list-style-type: none"> <li>- Turnpike Lane is currently a Piccadilly Line underground station and bus station with good bus links to complementary east west routes. The tube and bus station buildings were designed by Charles Holden and are Grade II Listed.</li> <li>- There is ground floor retail on the north sides of Turnpike Lane as it moves away from the High Road/Green Lanes and both sides from the end of Duckett's Common; Retail also occupies the ground floor of Westbury Avenue for a short distance, but as it rises to the bridge over the former Palace Gates Railway (now a cycle route, allotments and newer housing estates) it turns residential. The station itself occupies the south-eastern quarter of the junction, while Duckett's Common is on the south-west corner.</li> </ul> </li> </ul>
<p><b>Building Stock</b></p>	<ul style="list-style-type: none"> <li>• The sites have a collection and range of inter-war factory buildings and</li> </ul>	<ul style="list-style-type: none"> <li>• Prime retail area of Haringey. Most of the stock in this cluster is of good</li> </ul>

	<p>industrial stock of good to very poor quality stock.</p> <ul style="list-style-type: none"> <li>The better quality stock is already used to provide small business workspace.</li> </ul>	<p>quality with many buildings of architectural importance. However, there are some buildings of poor quality presenting a poor face towards the high street.</p>
<p><b>Access Infrastructure</b></p>	<ul style="list-style-type: none"> <li>Over ground Line- Hornsey over ground station and Alexandra Palace.</li> <li>Underground- Piccadilly Line- Wood Green, Turnpike Lane tube stations, and many buses to central and north London.</li> <li>Potential Future Crossrail 2 station at Turnpike Lane Station.</li> </ul>	
<p><b>Regeneration and Change drivers</b></p>	<ul style="list-style-type: none"> <li>Given to the proximity of the two sites the regeneration and change drivers have been studied in common.</li> </ul> <p><b>Regeneration Drivers:</b></p> <ul style="list-style-type: none"> <li>There are several regeneration initiatives planned for this area as listed below that are likely to have a wider socio-economic impact along with value uplift, making it more attractive for investment. The London Plan designates Haringey Heartlands. Wood Green as an area of intensification which has the potential to deliver approximately 1,500 new jobs and 1,700 new homes as a part of mixed use development.</li> <li>A future Crossrail 2 Station is suggested at Turnpike Lane: The Crossrail 2 connecting South to the North is most likely to serve Turnpike Lane station. This will significantly uplift the North-South connectivity, reduce journey times, will impact the land values and bring wider economic benefit to the area. However this will most likely not be delivered until the mid to late 2020's at best.</li> <li>There is a strong emphasis on public realm improvement throughout the Wood Green town centre, promoting car free development and improve connections to the West. Wood Green, Haringey Heartlands and the Cultural Quarter.</li> <li>Potential redevelopment of Station Rd and Bus Garage.</li> <li>Potential plans for improved East-West links through boulevard between Eastern and Western utility land. Potential plans for cycle route network; East West public passage to pass from Site 4, some of which could be pedestrian and cycle only</li> </ul>	



- Strong regeneration focus by Haringey Heartlands and Wood Green Area Action Framework. Plans include reprovision of an improved Wood Green central library, redevelopment of The Mall and improvements to Station Road
- Habitat provision along the rail line on the site's western boundary is designated as an ecological corridor.
- Haringey Heartlands plan proposed Local Square on the site opposite to the Chocolate Factory over Coburg Road.

**Cluster of creative industries:**



- Haringey Heartlands has a strong cluster of creative industries that define the Wood Green cultural quarter, this includes the Mountview Academy.

**Existing Workspaces:**

- Sites like the Chocolate Factory (Figure 15) are special workspace assets. Historically, a derelict Chocolate Factory that was later revived by a group of artists as their studios. Presently it is home to over 220 artists and providing work for some 500 people. The skills range of art forms from music, film, and media to performance arts and fashion.

**Figure 15: Chocolate Factory**

- Haringey Hertlands also hosts Olympia Industrial Estate (Figure 16) which is a mix of small businesses pertaining to garment industries and small scale offices, and Bittern House (Figure 17)- a refurbished warehouse facility with some flexible office use also adds to the workspace cluster.

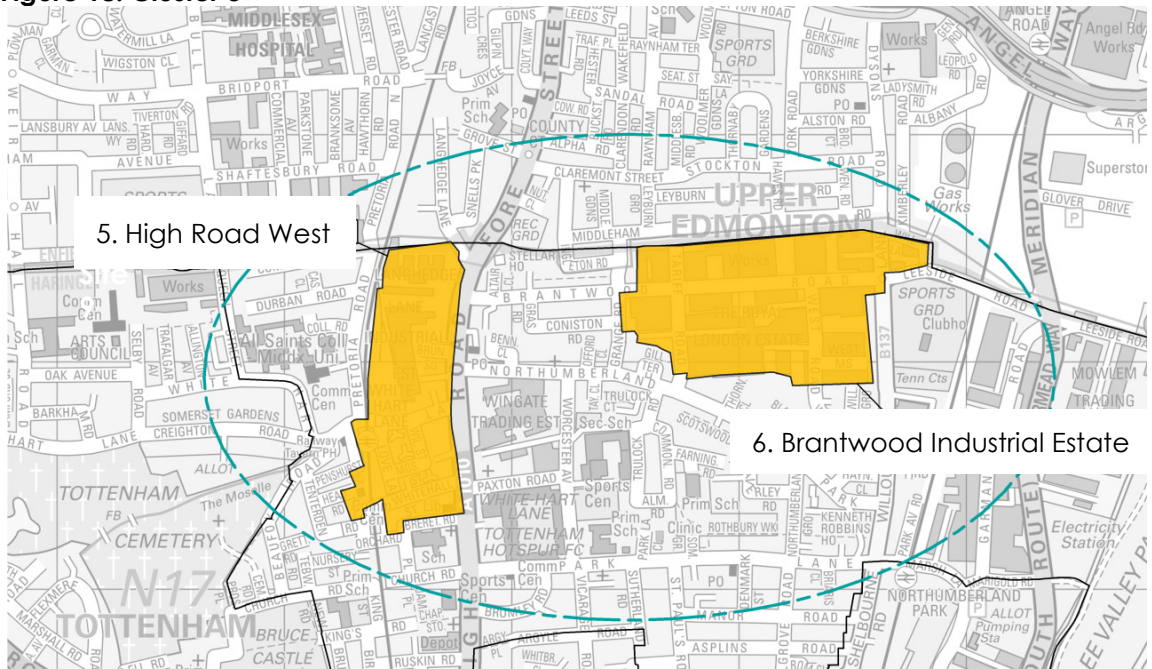
	<p><b>Figure 16: Olympia Industrial Estate</b></p>  <p><b>Figure 17: Unit 1-4 Bittern Place</b></p>  <p><b>Presence of Workspace Group:</b></p> <ul style="list-style-type: none"> <li>• Presence of operators like the Workspace Group who are the largest private-sector provider of managed workspaces in the UK is an added advantage for the cluster to attract more investment opportunities in the area.</li> </ul> <p><b>Strong Residential Market:</b></p> <ul style="list-style-type: none"> <li>• There is a strong presence of residential market. Proximity to the train stations and Wood Green High Street makes it a very attractive area for residential use and this is likely to bring a shift in the demographics and shift in the preference of businesses.</li> </ul> <p><b>Prime Local Centres:</b></p> <ul style="list-style-type: none"> <li>• Wood Green is designated as Metropolitan Town Centre and is a prime area for retail and commercial activities. There is a strong transport connection to this area.</li> </ul> <p><b>Excellent Public Transport Accessibility:</b></p> <ul style="list-style-type: none"> <li>• Overall this cluster has good public transport connections. Area 4 particularly has excellent connections with PTAL 6a. This is likely to be an influence on choice of workspace in this area.</li> </ul>
<p><b>Development Constraints</b></p>	<ul style="list-style-type: none"> <li>• Permeability issues due to poor street network legibility. Poor connections across the railway line on the West.</li> <li>• East Coast Main line (passing through Hornsey) poses a barrier to the connection between the East and West.</li> </ul>
<p><b>Potential Future Workspace Opportunities</b></p>	<ul style="list-style-type: none"> <li>• Studios; co-working, small office</li> <li>• Localised offices, co-working spaces</li> </ul>

	<ul style="list-style-type: none"> <li>• Live-work</li> </ul>
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### Cluster 3-North Tottenham

4.31 There are two areas falling in this cluster Area 5- High Road West and Area 6-Brantwood Industrial Estate, located in north Tottenham are close to the borough boundary with the London Borough of Enfield and Lee Valley Regional Park.

Figure 18: Cluster 3




Source: LB Haringey

Sites (Identified Workspaces)	Area 5 – High Road West, Site	Area 6- Brantwood Industrial Estate,
Location Characteristics	<ul style="list-style-type: none"> <li>• Location Ward: Northumberland Park</li> <li>• PTAL 4</li> </ul>	<ul style="list-style-type: none"> <li>• Location Ward: Northumberland Park</li> <li>• PTAL 2</li> </ul>
Planning Designations	<ul style="list-style-type: none"> <li>• Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>• Locally Significant Industrial Sites (Local Plan: Strategic Policies 2013)</li> <li>• Northumberland Park Area of</li> </ul>	<ul style="list-style-type: none"> <li>• Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>• Stratgical Industrial Land (Local Plan: Strategic Policies 2013)</li> <li>• Site Specific Proposal 19</li> </ul>

	<p>Change (Local Plan: Strategic Policies 2013)</p> <ul style="list-style-type: none"> <li>• Site Specific Proposal 19 (Unitary Development Plan) - Employment-led mixed use redevelopment including housing</li> <li>• Local Shopping Centre (Unitary Development Plan 2006)</li> <li>• North Tottenham Area Action Plan (Proposed)</li> <li>• Blue Ribbon Network; Ecological Corridor; Conservation Area</li> </ul>	<p>(Unitary Development Plan) - Employment-led mixed use redevelopment including housing</p> <ul style="list-style-type: none"> <li>• Local Shopping Centre (Unitary Development Plan 2006)</li> <li>• North Tottenham Area Action Plan (Proposed)</li> <li>• Blue Ribbon Network ; Ecological Corridor; Conservation Area</li> </ul>
<p><b>Predominant existing use and property type</b></p>	<ul style="list-style-type: none"> <li>• On the South of the site is Love Lane Estate- 297 council properties 6-7 storey</li> <li>• North of the site contains: <ul style="list-style-type: none"> <li>– The Goodyards site: A former employment site currently used for car parking on match days.</li> <li>– Peacock Industrial Estate: accommodating a range of industrial activities including car repair, scrap businesses, recycling, light industry</li> <li>– Chapel Place: employment site currently occupied by small businesses</li> <li>– Sainsbury supermarket adjacent to the railway station</li> <li>– Brooks House Site, with permission at Cannon Rubber for 22 new homes, workshops and primary school.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Area comprises of Units A-E, 200 Willoughby Lane; Elm Lea Trading Estate; Northumberland Park Resource centre</li> <li>• Brantwood Industrial Estate is collection of warehouse buildings mostly engaged in the Food Industry, Wholesale and Recycling (Metal, Car parts, car wash) Industry.</li> </ul>
<p><b>Sites and</b></p>	<ul style="list-style-type: none"> <li>• Site is in between Tottenham</li> </ul>	<ul style="list-style-type: none"> <li>• West- Primary School +</li> </ul>

<b>Surroundings</b>	<p>High Road in the East and railway line in the West;</p> <ul style="list-style-type: none"> <li>• Coombes Croft Library in the south to the former Cannon Rubber factory in the north.</li> <li>• The Tottenham Hotspur stadium is located on the South East of the site across the High Road.</li> </ul>	<p>Housing, and Lee Park</p> <ul style="list-style-type: none"> <li>• South- adjoined by houses and small businesses- covered under Northumberland Park Master Plan.</li> </ul>
<b>Building Stock</b>	<ul style="list-style-type: none"> <li>• Buildings on north of the White Hart Lane are large sites with goods yards/ storage use with poor to very poor quality stock. There are some good quality buildings towards the South of the High Road West predominantly three storeys with some architectural merit.</li> </ul>	<ul style="list-style-type: none"> <li>• Predominantly post-war large warehouse floorplate stock of mixed quality.</li> </ul>
<b>Access Infrastructure</b>	<ul style="list-style-type: none"> <li>• Overground- White Hart Lane Station and adjacent to Tottenham high street.</li> </ul>	<ul style="list-style-type: none"> <li>• Northumberland Park Station.</li> </ul>
<b>Regeneration and Change drivers</b>	<ul style="list-style-type: none"> <li>• Given to the proximity of the two sites the regeneration and change drivers have been studied in common:</li> </ul> <p><b>Connections:</b></p> <ul style="list-style-type: none"> <li>• Plans for significant uplift in rail services frequencies at Northumberland Park station; proposal for improvement of White Hart Lane station.</li> <li>• Enhance East West connections- Tottenham physical area framework notes scope of connections between the site 9 and Lee Valley Regional Park by foot and bicycle.</li> <li>• New public open space –Policy documents also identify potential for strong pedestrian link between White Hart Lane Station, the High Road and the football stadium.</li> </ul> <p><b>Regeneration proposals:</b></p> <ul style="list-style-type: none"> <li>• Newlon Housing Trust's approved residential scheme at Brook</li> </ul>	

	<p>House (the former Cannon Rubber site) which includes workspaces and a new primary school;</p> <ul style="list-style-type: none"> <li>• White Hart lane: Improvement to White Hart Lane Station, including the relocation of the station entrance/exits and plans for a new station square</li> <li>• Tottenham Stadium and Hotspur redevelopment: Redevelopment of Tottenham Football Stadium and regeneration is likely to bring uplift in this area. There is a proposed Technical College along with construction of a new community facility/Ideas Store adjacent to the new public space, which will reinforce the concept of this area as a leisure hub. The Ideas Store could contain a library, learning centre and other services provided by the third and private sectors;</li> <li>• Peacock Industrial Estate is earmarked for regeneration and redevelopment for predominantly non-employment generating uses.</li> </ul> <p><b>Policy support and relocation of CHENEL:</b></p> <ul style="list-style-type: none"> <li>• The area contains Strategic Employment Land as a part of London's reserve. Council to encourage high quality space.</li> <li>• Proposals to identify potential site for re-location of CHENEL building, currently located at Tottenham Green. Potentially focus of higher education investment.</li> </ul> <p><b>Existing Workspaces</b></p> <ul style="list-style-type: none"> <li>• This area includes 639 High Road which has recently been redeveloped as a business centre. The area also has a range of community facilities that reflect the number of homes in the area including Coombes Croft library, four primary and one secondary school. This cluster provides a strong basis for a potential for a comprehensive enterprise development strategy for Tottenham, including a range of tailored business support, in conjunction with 639 High Road as well as other providers.</li> </ul>
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	<p><b>Figure 19: London Youth Support Centre, 639 High Road West</b></p> 
<p><b>Development Constraints</b></p>	<ul style="list-style-type: none"> <li>• Weak East West link: There are strong north-south public transport routes the area, but generally weaker east-west ones. Tottenham High Rd has numerous bus routes, and there are two rail lines passing through the area, with train frequency at Northumberland Park expected to double in the future.</li> </ul>
<p><b>Potential Future Workspace Opportunity</b></p>	<ul style="list-style-type: none"> <li>• Studios;</li> <li>• co-working;</li> <li>• Small office (in the long term)</li> </ul>

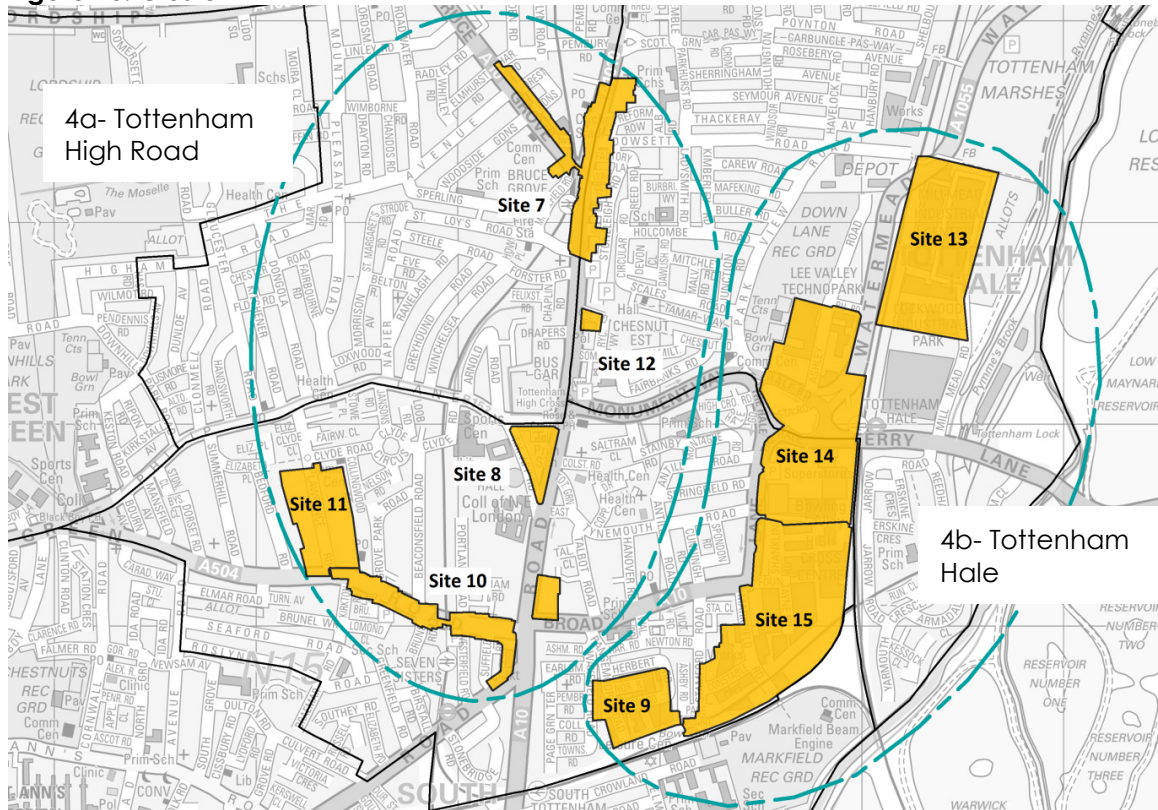
### Cluster 4

4.32 Cluster 4 is located on the East in the wards of Tottenham Hale, Tottenham Green and Bruce Grove. It has two sub areas:

#### 4a- High Road Corridor:

4.33 The high road is a significant spatial asset in Tottenham. It is a key historic north-south route linking London and its hinterland. It contains Tottenham retail core area, key rail nodes at Seven Sisters and Bruce Grove. There are five sites marked in this cluster: Site 7 Tottenham High Rd District Centre, Site 12 Tottenham Police Station, Site 8 Tottenham Green, Site 11 Lawrence Road, and Site 10 Seven Sisters/ West green Road

Figure 20: Cluster 4



Source: LB Haringey

4.34 Following table reviews characteristics of Site 7 and Site 12.

Site	Site 7- Tottenham High District Centre	Site 12 Tottenham police Station
<b>Location Characteristics</b>	<ul style="list-style-type: none"> <li>• Ward: Bruce Grove</li> <li>• Excellent public transport connections. High PTAL levels 5 and above</li> </ul>	<ul style="list-style-type: none"> <li>• Ward: Tottenham Hale</li> <li>• Excellent public transport connections. High PTAL levels 5 and above</li> </ul>
<b>Planning Designations</b>	<ul style="list-style-type: none"> <li>• Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>• Tottenham High Road Area of Change (Local Plan: Strategic Policies DPD)</li> <li>• Bruce Grove District Centre ( Local Plan: Strategic Policy DPD)</li> <li>• Secondary Town Centre</li> </ul>	<ul style="list-style-type: none"> <li>• Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>• Tottenham High Road Area of Change (Local Plan: Strategic Policies DPD)</li> <li>• Bruce Grove District Centre ( Local Plan: Strategic Policy DPD)</li> </ul>



	<p>frontage (Unitary Development Plan 2006)</p> <ul style="list-style-type: none"> <li>• Conservation Area</li> </ul>	
<p><b>Predominant existing use and property type</b></p>	<ul style="list-style-type: none"> <li>• The area includes a number of high quality buildings along Bruce Grove, as well as serving as the main independent retail centre for Tottenham.</li> <li>• Bruce Grove itself has conservation value and the site is triangular in plan on the north-east side of Bruce Grove, and primarily consists of three buildings on this frontage.</li> <li>• The area has a collection of early 20th century building. There is Snooker Hall building, former cinema building with red bricked façade, all locally listed.</li> <li>• There is also car parking, yards and scrubland, and a train line passing omn the north of the site.</li> <li>• To the North West of the site is a residential area of 19th century buildings.</li> </ul>	<ul style="list-style-type: none"> <li>• The building which currently is a police station is well positioned in the High Road corridor. It is centrally located in the heart of the cultural area.</li> <li>• The building is of architectural importance and is a good quality stock. Bruce Grove AAP hints towards potential development of Tottenham police station (should it be vacated for workspace).</li> </ul>

4.35 Following is the site review summary for Site 8- Tottenham Green and Site 10- Seven Sisters/ West Green.

Site	Site 8 Tottenham Green	Site 10 Seven Sisters/ West green Rod
<p><b>Location Characteristics</b></p>	<ul style="list-style-type: none"> <li>• Ward: Tottenham Green</li> <li>• Excellent public transport connections. High PTAL levels 5 and above</li> </ul>	<ul style="list-style-type: none"> <li>• Excellent public transport connections. High PTAL levels 5 and above</li> </ul>

<p><b>Planning Designations</b></p>	<ul style="list-style-type: none"> <li>• Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>• Tottenham High Road Area of Change (Local Plan: Strategic Policies DPD)</li> <li>• Strategic Open Land</li> <li>• Historic park</li> <li>• Area of Archaeological Importance</li> <li>• Conservation Areas</li> </ul>	<ul style="list-style-type: none"> <li>• Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>• Seven Sisters Corridor (Local Plan: strategic policies 2013)</li> <li>• West Green/ Seven Sisters District Centre ( Local Plan Strategic Policies 2013)</li> <li>• Site Specific Proposal 21 (UDP-2006)</li> <li>• Primary and Secondary Town Centre Shopping Frontages (UDP 2006)</li> <li>• Conservation Areas.</li> </ul>
<p><b>Predominant existing use and property type</b></p>	<ul style="list-style-type: none"> <li>• Site is the heart of Tottenham Green cultural area. The junction holds a small park, Holy Trinity church and is surrounded by education, arts and culture related institutions such as Bernie Grant Arts Centre, CONEL, NLSSM, and The Dream Centre Tottenham Town Hall on the West;</li> <li>• a bus depot on the North, which is currently proposed for relocation of existing use and creation of a mix of commercial and residential uses with new public open space. Mixed use development with civic functions located on ground floor and other customer-facing public service.</li> </ul>	<ul style="list-style-type: none"> <li>• Seven Sisters is an area of more intense development and a Victoria Line underground and national rail station. The area contains West Green district shopping centre and interfaces with Seven Sisters Rd corridor.</li> <li>• The area consists of the Wards Corner site which presently is a local market and some terraced housing, and Apex House, which is currently a council-owned and operated office building. The two sites are separated by Seven Sisters Road.</li> <li>• There is active frontage wrapping facing Seven Sisters Road. There are also some derelict buildings in this area. The western edge, formed by Suffield Road, is a street of late 19<sup>th</sup> century, 2</li> </ul>

		<p>to 3 storey terraced housing.</p> <ul style="list-style-type: none"> <li>To the south of Apex House is a 1970s estate of council housing some of which is in private ownership. To the north of Seven Sisters Station, and between the site and Seven Sisters Over ground station are terraced housing. About half of the Wards corner site as well as most of the street and public realm itself, including right up to the edge of Apex House is in Seven Sisters and Page Green Conservation Area.</li> </ul>
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4.36 The following table reviews change drivers and potential future workspace opportunities for cluster 4a- Site 7, Site 8, Site 10 and Site 12. These characteristics have been reviewed together for all the four sites given their proximity and more interdependent nature of impact. Note that the Site 11 Lawrence Rd. has been studied separately, given to its location and nature of use, offering different workspace opportunities.

<p><b>Regeneration and Change drivers</b></p>	<ul style="list-style-type: none"> <li>Site 7 Tottenham High District Centre</li> <li>Site 12 Tottenham police Station</li> <li>Site 8 Tottenham Green</li> <li>Site 10 Seven Sisters/ West green Rod</li> </ul>
	<p><b>Cultural Heart of Tottenham:</b></p> <ul style="list-style-type: none"> <li>The area is known as the cultural heart of Tottenham. There are a range of civic and cultural uses at Tottenham Green such as CHENEL, BG Arts Centre, Town Hall, Old Fire Station Site, Marcus Gravey Library, Tottenham leisure Centre and relocation of businesses such as McAslan Architects.</li> <li>There is also a thriving Caribbean community already existing on the West Green Road making the area diverse mix in terms of demographics and use.</li> </ul> <p><b>Regeneration Opportunities:</b></p> <ul style="list-style-type: none"> <li>Removal of gyratory to reduce the impact of traffic and improve the pedestrian experience.</li> </ul>

- Retail frontage redevelopment plan.
- Improved victoria line connection to Kings Cross knowledge quarter likely to positively impact the movement of the businesses, people and the land value dynamics of the area.
- Enhanced public realm and green space; and distinctive retail offer along West Green Road.

**Excellent Public Transport Accessibility:**

- Excellent Public Transport Accessibility with the area served by Seven Sisters underground station and numerous bus routes and proposed devolution of West Anglia line to TFL.
- Tottenham Hale is planned to be a stop for future Crossrail 2 connection North South routes. This is likely to have significant impact on the public transport accessibility levels in the area and is like to have wider economic impact and will further escalate land values in the area.

**Cultural Hub at Tottenham Green:**



- Tottenham Green has been designated as area of change and is being developed as a civic and cultural hub, with leisure centre, library and space for start-up businesses, and potential additions to Tottenham's evening economy.

**Residential Led Development:**

- There is an increase shift towards residential development in this area. The AAP estimates long term plans for creation of 700 new homes around Tottenham Green on Bus Garage, leisure centre/ library, car-park and Seven Sisters regeneration site. This is likely to be a trigger for uplift of the area in terms of regeneration and land values, along with new incoming population.

**High Quality Stock**


- The area offers range of good quality stock such as Tottenham Police Station building, Bruce Grove Snooker Hall, Bernie Grant Arts Centre that is of architectural and aesthetic value and is suitable to support workspace activities.

	<p><b>Figure 21: Tottenham Police Station</b></p>  <p><b>Site Specific Regeneration:</b></p> <ul style="list-style-type: none"> <li>• Site specific redevelopment (mostly-residential led) like Apex House redevelopment, CHENEL relocation and Arriva bus Garage sites likely to uplift the overall area and the land values. Grainger's investment in a complex development scheme at Wards Corner shows significant investor confidence in the area. All the above change drivers are likely to influence business investment in this area. Watermead Business Centre based in CONEL</li> </ul> <p><b>Figure 22: Bernie Grants Arts Centre</b>      <b>Figure 23: CHENEL Centre</b></p> 
<p><b>Development Constraints</b></p>	<ul style="list-style-type: none"> <li>• Poor connection between the East and West of the High Road.</li> </ul>
<p><b>Potential Future workspace Opportunity</b></p>	<ul style="list-style-type: none"> <li>• Managed workspace,</li> <li>• Co-working,</li> <li>• Localised office space.</li> </ul>

4.37 The following table reviews Site 11- Lawrence Road from cluster 4a. The nsite has been reviewed separately given to its location and nature of the site and uses.

	<p><b>4a-Tottenham High Road</b></p> <p>Site 11 Lawrence Road</p>
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<b>Location Characteristics</b>	<ul style="list-style-type: none"> <li>Public Transport Accessibility Level 3</li> </ul>
<b>Planning Designations</b>	<ul style="list-style-type: none"> <li>Site Specific proposal 27 (UDP, 2006): Mixed Use employment and residential development</li> <li>Planning permission has been granted to the southern end of the site (HGY/2012/1983)</li> </ul>
<b>Predominant existing use and property type</b>	<ul style="list-style-type: none"> <li>Site 11 Lawrence Road connects West Green Road and Philip Lane and is located west of Seven Sisters tube station, with the southern extent being a short walk to the facilities of West Green/ Seven Sisters District Centre.</li> <li>At the northern end an east west linear park connects Tottenham Green (behind BG grants etc.) through to Clyde Circus which lies to the north.</li> <li>The majority of businesses within the area are in the clothing production business or associated activities e.g. storage, distribution of clothing, cleaning, and garment fittings zips (use class B2). Other sectors include the storage and distribution of mail, CDs and Vinyl, (use class B8). There are education and training and Design and printing businesses based here. There are at least two small cafés on the road and also a live-work development at no. 28 Lawrence Road.</li> <li>There are residential units to the east, west and north of the site. To the north at Philip Lane, lie Philip Lane West and Philip Lane East Local Shopping Centres. The southern boundary is characterised by a mix of residential and retail, including West Green Town Centre.</li> <li>The buildings are late 1960s, previously used for clothing industry throughout 1970s and 1980s. Most are of poor to average quality stock with some buildings having a good quality stock of some architectural interest.</li> </ul>
<b>Regeneration and Change drivers</b>	<p><b>Planning Policy Support</b></p> <ul style="list-style-type: none"> <li>Lawrence Road has been identified in Haringey's Unitary Development Plan (2006) as an area suitable for mixed-use development; employment and residential. This is a major change from past plans in which the area was identified for employment use only.</li> </ul> <p><b>Existing Use Drivers:</b></p> <ul style="list-style-type: none"> <li>There is a presence of clothing related creative industry in this area. With almost 68% of businesses relating to clothing</li> </ul>

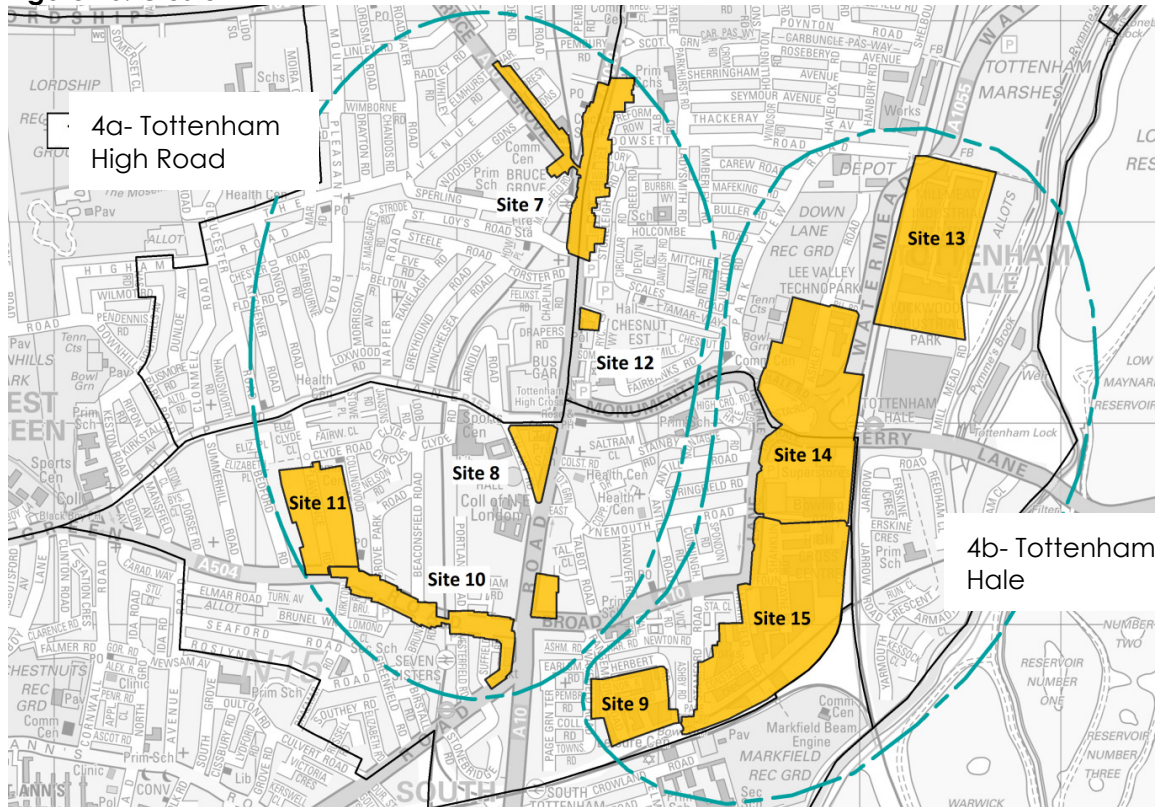
	<p>manufacturing and distribution sector.</p> <ul style="list-style-type: none"> <li>• 28 Lawrence Road is split into a number of Commercial and Live-Work units hosting multiple uses such as photography studio, real estate offices and other office based companies.</li> </ul> <p><b>Figure 24: Studio 28, Lawrence Road</b></p> 
<p><b>Development Constraints</b></p>	<ul style="list-style-type: none"> <li>• Poor environmental quality and public realm</li> <li>• Low on public transport accessibility levels.</li> </ul>
<p><b>Potential Future workspace Opportunity</b></p>	<ul style="list-style-type: none"> <li>• Live-Work Units</li> <li>• Managed workspaces</li> </ul>

**Cluster 4b-Tottenham Industrial Area/ Tottenham Hale:**

4.38 Tottenham Hale is an identified Growth Area in the Haringey Local Plan, and has aspirations for the designation of Tottenham Hale as a District Centre by 2025. The London Plan identifies Tottenham Hale’s strategic position in the London-Stansted-Cambridge-Peterborough corridor and predicts that the area can deliver new homes and jobs, and will be promoted as an international transport hub supported by significant investment in public transport.

4.39 There are four areas within this cluster, Site 13- Millmead Industrial Estate; Site 14- Tottenham Retail Park, Station interchange, Station Square West and Ashley Road South; Site 15- South Tottenham Industrial Area; and Site 15- South Tottenham Industrial Area.

Figure 25: Cluster 4



Source: LB Haringey

Cluster 4b-Tottenham Industrial Area/ Tottenham Hale		
<p><b>Sites (Identified Workspaces)</b></p>	<ul style="list-style-type: none"> <li>Site 13-Millmead Industrial Estate (Millmead Business Centre)</li> </ul>	<ul style="list-style-type: none"> <li>Site 14- There are host of opportunity sites in this area which can be classified as-                             <ul style="list-style-type: none"> <li>Tottenham Retail Park</li> <li>Station Interchange</li> <li>Station Square West</li> <li>Ashley Road South</li> </ul> </li> </ul>
<p><b>Accessibility Level</b></p>	<ul style="list-style-type: none"> <li>PTAL 5</li> </ul>	<ul style="list-style-type: none"> <li>Tottenham Retail Park- PTAL 5; Station Interchange-PTAL 6; Station Square West- PTAL 6; Ashley Road South- PTAL 4</li> </ul>
<p><b>Planning Designations</b></p>	<p><b>Common Designations</b></p> <ul style="list-style-type: none"> <li>Upper Lea Valley Opportunity Area (London Plan 2011)</li> <li>Tottenham Hale Growth Area</li> </ul>	<p><b>Common Designations</b></p> <ul style="list-style-type: none"> <li>Upper Lea Valley Opportunity Area (London Plan 2011)</li> </ul>



	<p>(Local Plan: Strategic Policies DPD)</p> <ul style="list-style-type: none"> <li>• Strategic Industrial Land</li> </ul>	<ul style="list-style-type: none"> <li>• Tottenham Hale Growth Area (Local Plan: Strategic Policies DPD)</li> <li>• Site Specific Proposal 20 (UDP-2006)</li> </ul> <p><b>Site Specific</b></p> <ul style="list-style-type: none"> <li>• Tottenham Retail Park -Flood Risk Zone 2; Area of Archaeological Importance</li> <li>• Station Interchange- Local Employment Area (Local Plan: Strategic Policies DPD)</li> <li>• , Station Square West- Area of Archaeological Importance</li> <li>• Ashley Road South-Local Employment Area.</li> </ul>
<p><b>Predominant existing use; property type and sites and surroundings.</b></p>	<ul style="list-style-type: none"> <li>• Site 13- Millmead Industrial Estate has warehouse and distribution facilities. It also consists of Millmead Business Centre which has high occupancy rate from the SME's and hosts specialised facilities like recording studios.</li> <li>• The South of the site is Hale Village which is a significant residential development currently under construction. The east of the site is 8 storey residential with a nursery school, flexible community facility.</li> </ul>	<ul style="list-style-type: none"> <li>• The area contains following sites</li> </ul> <p><b>Tottenham Retail Park-</b></p> <ul style="list-style-type: none"> <li>• The site is currently a retail warehouse with double height single storey retail warehouse and ancillary car parking. It is accessible from Broad Lane and Ferry lane, and these roads act as a barrier to the site being accessible to prominent residential areas in the north and west.</li> <li>• Retail units line the southern and eastern site edge, with service yards and access roads (part of the site) to their rear. Their public fronts the north and western edge of the site, frontage by bus ferry lane (A503)to the North and Broad Lane to the west.</li> </ul>

		<ul style="list-style-type: none"> <li>• The gyratory is being removed by TFL, with all roads concerned reverting to two way traffic. East of the site is West Anglia Main Line; currently two tracked and plans for expanded on the far side of the site. South of the site is South Tottenham employment area including Fountayne Business Centre and High Cross Centre,</li> </ul> <p><b>Station Interchange -</b></p> <ul style="list-style-type: none"> <li>• At present, Tottenham Hale Station is an isolated transport interchange with main line (inc. the Stansted Express), London Underground (Victoria Line), many London transport and other operator services. Taxi and pvt car drop-off/pick and private parking.</li> <li>• There is a redevelopment of the station area planned to create a new gateway to Tottenham and wider North London area.</li> </ul> <p><b>Station Square West-</b></p> <ul style="list-style-type: none"> <li>• Currently site consists of traffic island and land on the opposite side of Hale Road, to its north. This is at centre of gyratory system that is currently being removed; this site will become major development opportunity with a number of sites containing potential for landmark developments.</li> </ul>
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		<p><b>Ashley Road South-</b></p> <ul style="list-style-type: none"> <li>• This site forms the northern part of the coordinated plans to improve Tottenham Hale and adjoins the proposed station interchange and Station Square West. To its north and east is the further designated site of Ashley Road North.</li> <li>• The site is a narrow slither of land divided into 5 yard type industrial uses mostly with wholesale retail type facility. It includes Berol House, a large victorian former industrial building that has been converted to provide offices space.</li> <li>• The North of the site is 'Technopark' which is a former workpace building that has been recently converted into a school.</li> <li>• The abuts the A155 Watermead Way, a 1980s road that rises to cross the rail lines. The West of the site is Down Lane Park and further on the Northern edge the site is surrounded by terraced housing</li> </ul>
<p><b>Building Stock</b></p>	<p>Good to poor quality large floor plate warehouse facility.</p>	<ul style="list-style-type: none"> <li>• Tottenham Retail Park- Average to good quality large floor plate double height single storey retail warehouse and ancillary car parking.</li> <li>• Ashley Road South- This site is currently low to medium industrial range of good to</li> </ul>

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		poor quality.
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4.40 Below we consider sites that form part of Cluster 4b - Tottenham Industrial Area/ Tottenham Hale, these are Site 15- South Tottenham Industrial Area and Site 9- Rangemoor Industrial Site.

<b>Cluster 4b-Tottenham Industrial Area/ Tottenham Hale</b>		
<b>Sites (Identified Workspaces)</b>	<ul style="list-style-type: none"> <li>Site 15- South Tottenham Industrial Area</li> </ul>	<ul style="list-style-type: none"> <li>Site 9- Rangemoor Industrial Site</li> </ul>
<b>Predominant existing use and property type</b>	<ul style="list-style-type: none"> <li>The industrial estate is collection of locally significant industrial sites in the local plan. It contains industrial buildings of range of ages from the early 20th century to recent mostly in active industrial use but with some which have been converted to active residential use.</li> <li>Markfield Road is a collection of small scale businesses, traditional manufacturing warehousing, wholesale business that mostly qualifies as micro enterprise. There are some distinct high end business units located here military uniform maker, mannequin maker and stone restorer and organic food trader. Recently this area has seen an influx of young demographics that are engaged in 'creative' sector which has led to - mixed employment led offer with upgraded workspaces, some live-work units, and management and hub facilities to support the growth</li> </ul>	<ul style="list-style-type: none"> <li>Rangemoor Industrial Area has industrial and warehousing units of various sizes including small units. It has diversity of businesses such as textile, frozen food, butchers, iron works, recycling and manufacturing industries.</li> </ul>

	of an emerging creative quarter around Fountayne Road.	
<b>Building Stock</b>	<ul style="list-style-type: none"> <li>• Markfield Road has large range of building age, typology and use (Victorian to 1980s stock) and some post-war purpose-built industrial and warehousing units but equally have a number of long-term vacant or derelict sites of poor built stock.</li> </ul>	<ul style="list-style-type: none"> <li>• The site has multitude of building stock types including 1990's single storey brick buildings, purpose built sheds and adjacent yards and two storey brick buildings, with most with roller shutter in the front.</li> <li>• Large warehouse and distribution facility. Most stock befits the nature and function of the use it serves but is of poor to average quality.</li> </ul>
<b>Accessibility</b>	<ul style="list-style-type: none"> <li>• Site South Tottenham industrial Area (TH8) and Rangemoor-Underground- Tottenham Hale Station</li> <li>• Tottenham industrial Area (TH8)- Varies PTAL 3 and 4</li> </ul>	
<b>Planning Designations</b>	<ul style="list-style-type: none"> <li>• Local Strategic Industrial Site (Local Plan: Strategic Policies DPD)</li> <li>• Area of Archaeological Importance</li> <li>• Ecological Corridor</li> <li>• Site of Nature Conservation (Borough Grade II)</li> </ul>	

4.41 The following table reviews change drivers and potential future workspace opportunities for cluster 4b. These characteristics have been reviewed together for all the four sites given their proximity and more interdependent nature of impact.

<p><b>Sites (Identified Workspaces)</b></p>	<p><b>Cluster 4b-Tottenham Industrial Area/ Tottenham Hale</b></p> <ul style="list-style-type: none"> <li>• Site 13-Millmead Industrial Estate (Millmead Business Centre)</li> <li>• Site 14- There are host of opportunity sites in this area which can be classified as- Tottenham Retail Park; Station Interchange ; Station Square West; and Ashley Road South</li> <li>• Site 15- South Tottenham Industrial Area</li> <li>• Site 9- Rangemoor Industrial Area</li> </ul>
<p><b>Regeneration and Change drivers</b></p>	<p><b>4b-Tottenham Industrial Estates/ Tottenham Hale</b></p> <ul style="list-style-type: none"> <li>• Tottenham Hale regeneration and station development</li> <li>• West Anglia Mainline Stratford to Angel Road upgrade;</li> <li>• Gyratory scheme including a new bus interchange at Tottenham Hale station, two-way traffic movement along Monument Way and Broad Lane, pedestrian streetscape and cycle improvements;</li> <li>• Completion of the final phases of Hale Village- Hale Village with 1,176 homes,18 units of student accommodation, office, retail, health and community facilities will have a significant impact on the land values and will be change driver in the area.</li> <li>• Development proposals for Hale Wharf; and Preparation of a development brief for key sites around Tottenham Hale.</li> <li>• Markfield Road is a part of National Cycle Route 1.</li> <li>• Promote and enhance east-west connections between Tottenham Hale and Tottenham Green, including Monument Way and the 'green link' on Chesnut Walk to Hale Wharf and beyond.</li> <li>• Tottenham Hale is planned to be a stop for future Crossrail 2 connection North South routes. This is likely to have significant impact on the public transport accessibility levels in the area and is like to have wider economic impact and will further escalate land values in the area.</li> </ul> <p><b>Influx of young single 'creative' demographics:</b></p> <ul style="list-style-type: none"> <li>• South Tottenham is known to be the microcosm of Tottenham's diversity with a rich mix of business type, building stock and demographics contained in small geographical area. It occupies a</li> </ul>

clear niche as a servicing and supply function in London market. It is seen to be increasingly dominated by single 'creative' demographic replacing more traditional businesses. There are several evidences of incremental and Live-Work form of development.

**Council ownership:**

- Although ownership is fractured in the sub-area there is still a significant amount of council ownership in this area in the Rangemoor Rd. area. This can be an opportunity for developing an integrated workspace investment strategy for this area to attract investors for SMEs.

**Strong concentration of micro business:**

- The majority of the businesses within the area are traditional manufacturing, warehousing and wholesale business, and qualify as micro-enterprise (0-9 FTE). There are also distinctly high end businesses located here such as military uniform maker, stone restorer and organic food trader.



**Existing workspaces:**

- Mill Co Workspace pilot project: There is already a good concentration of workspaces for SMEs in Tottenham Hale. On the Rangemoor and Ashley Road South (TH4) existing spaces such as Millmead Business Centres, a former factory converted for office use in the 80s, hosted at least 90 different businesses at one point. It currently hosts offices for many companies and has sound recording studio.
- There are small scale concentrations of artists and small office spaces, informal live work spaces in this cluster such as in High Cross Industrial Estate and Tudor Business Centre.

**Figure 26: High Cross Industrial Estate      Figure 27: Tudor Business Centre**





	<p><b>Figure 28: Imperial Works- Markfield Road</b></p>  <p><b>Figure 29: Mill Mead Business Centre</b></p>  <p><b>Media Coverage:</b></p> <ul style="list-style-type: none"> <li>• South Tottenham has been increasingly gaining media coverage due to its upcoming cultural quarter and is increasingly coming to be known as being dominated by creative demographics who are transforming the place into a cultural cluster.</li> </ul> <p><b>Rising rental and land values in Hackney and Islington:</b></p> <ul style="list-style-type: none"> <li>• In the past decade Hackney and Islington have seen a considerable rise in rental values and increased densification. This has made it difficult for many small and medium sized businesses to afford these areas despite these areas having a strong economical cluster. Rising rental and land values in these boroughs is most likely to have a knock-on effect in South Tottenham area and on the workspace market. Affordability is likely to drive locational preference of workspace operators in this area over its neighbouring boroughs.</li> </ul> <p><b>Growing Student Population:</b></p> <ul style="list-style-type: none"> <li>• The presence of technical college CHENEL, retail nature of the high street along with factors like affordability makes this area an attractive place for the student population. Upcoming students housing such as North Lodge in Tottenham Hale is also a strong driver for student's population to be attracted to this area.</li> </ul>
<p><b>Development Constraints</b></p>	<ul style="list-style-type: none"> <li>• Markfield Road is a part of national cycle route 1 but presents an unattractive and possibly unsafe route.</li> <li>• High vacancy levels</li> <li>• Incompatible uses in Markfield Road such as recycling and oil storage.</li> <li>• Unpermitted residential use in South Tottenham sites (Markfield</li> </ul>

	Road) <ul style="list-style-type: none"> <li>• Low land values and high redevelopment costs.</li> </ul>
<b>Potential Future Workspace Opportunities</b>	<ul style="list-style-type: none"> <li>• Ashley Road North- Managed workspace, co-working</li> <li>• Millmead – incubator or accelerator, requires an institutional sponsor</li> <li>• Markfield Rd -Studios, small office spaces, live work.</li> </ul>

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## 5. Workspace Viability Assessments

### Introduction

- 5.1 To provide further assessment of the viability of workspace development in the borough of Haringey, a set of initial appraisals have been undertaken to establish the viability of providing a range of workspace types in the four identified clusters.
- 5.2 These appraisals consider costs of development on one hand, and receipts based on supportable rents and market yields in the area to establish the broad viability position. The balance is compared to existing use values to set benchmarks for understanding the potential for market delivery, the requirement for non-market interests to lead or the level of subsidy that would be required to enable development.
- 5.3 The approach taken has been to establish the viability of workspace on a per sqm basis. This also allows comparisons with estimated per sqm values for existing uses and also against other commercial or residential uses. The relationship between these values and any development quantities across uses classes can then be assessed. This approach has been taken as a more flexible approach to, and in the absence of notional schemes. This also allows testing of the effect of changes in values.
- 5.4 The viability analysis will not account for the cost of any third party acquisitions. We intend to assume that the sites are vacant and capable of development both in planning and legal terms. However, we consider 'threshold land values' by way of determining viability and deliverability. These values will be produced with reference to existing use value and/or alternative use value (non-Red Book) which will be established as part of the study on a cluster by cluster basis.

### Assumptions

#### Residential Unit Mix

- 5.5 The total number of units to be provided on each site has been provided by the council, as set out in the schedule above. As a base case, we have tested the proposed schemes on the basis of a policy compliant tenure mix.

**Table 3: Assumed housing tenure mix**

Input	Rate	Basis
Private / Market	50%	Based on Policy SP2 of the Haringey Local Plan (2013)
Shared Ownership	70% of Affordable Units	Based on guidance in para 3.2.19 of Haringey Local Plan (2013)
Intermediate	30% of Affordable Units	Based on guidance in para 3.2.19 of Haringey Local Plan (2013)

### Residential Values

#### Private

- 5.6 To provide a high level assessment of viability of the sites, GVA has carried out a review of desktop data and contacted local agents in order to arrive at a view on likely private sale prices. This exercise has been conducted at a cluster-wide level.

**Table 4: Adopted Private Residential Sales Values (£psm)**

Cluster 1	Cluster 2	Cluster 3	Cluster 4a (Bruce Grove)	Cluster 4b (Seven Sisters)	Comments
£5,340	£5,033	£3,193	£4,011	£4,568	Based on comparable evidence

#### Affordable Housing Values

- 5.7 As set out above, we have assumed a policy compliant affordable housing provision of 50%, of which 70% are social rented and 30% are intermediate tenure (shared ownership). We have adopted the following affordable sale calculation assumptions to establish a £psm value.

**Table 5: Adopted Affordable Sale Calculation Assumptions**

Affordable Housing Tenure	Calculation
<b>Intermediate</b>	Assumed that the initial equity tranche to be sold will equate to 35% of the open market value and that a rent of 2.50% rent will be charged on unsold equity. We have deducted 7.00% from the rent to account for management fees, maintenance and bad debts. The rent is capitalised using a yield of 5.50%.
<b>Capped Rent</b>	50% of market rent. We have deducted 40% from the adjusted gross rent to account for management fees, maintenance and bad debts. The net rent is capitalised using a yield of 5.50%.

5.8 Using this approach we have adopted the following value assumptions for the purposes of our appraisals.

**Table 6: Adopted Affordable Sale Values**

	Cluster 1	Cluster 2	Cluster 3	Cluster 4a	Cluster 4b	Comments
<b>Shared Ownership</b>	£3,630	£2,805	£1,815	£2,970	£2,158	Market sales value based on land registry sales data
<b>Social Rented</b>	£1,469	£1,364	£1,049	£1,154	£1,561	Market rental values sourced from rightmove/Zoopla

5.9 These £psm values represent a weighted average, calculated on the basis of the following unit mix.

**Table 7: Assumed housing mix**

	1 bed Flat	2 bed Flat	3 bed Flat	Comments
<b>% Mix</b>	30%	40%	30%	Based on CIL Viability Study Mix and comparable evidence

### Commercial Values

5.10 We have conducted research into local comparable schemes, together with discussions with GVA in-house agency teams, adopted the following values:-

**Table 8: Adopted Commercial Value Assumptions**

	Cluster 1	Cluster 2	Cluster 3	Cluster 4a	Cluster 4b	Yield	Comments
<b>Traditional Office</b>	£182	£141	£124	£161	£161	8%	Based on egi/focus deals, comparable evidence and consultation with in-house agents
<b>Workspace</b>	£183	£154	£122	£182	£182	7%	

- 5.11 Due to a lack of local comparable workspace schemes, the assumptions are based on comparable schemes London wide, in both inner and outer London.
- 5.12 Estimating the value of co-working spaces is challenged by the small number of cases and the emerging nature of this sector. The income basis is typically on monthly memberships, which are tiered according to the amount of time required per month. Additional services can be purchased from a menu of items. While having parallels with other membership and hotel model businesses, incomes will roll through to an occupancy level and a comparable to a per square foot leasable value. While this is a different form of office employment space, but the financial metrics will be the similar. The providers are often existing property based businesses and their funders and internal credit committees would assess the investment against in property terms.
- 5.13 Co-working space is likely to have a similar rental equivalent profile as adjacent office markets. If it were lower, buildings would convert to that mainstream office rather than co-working space. If co-working space had a premium over office, more of it would have converted to that. Although it's a highly visible market, the actual square footage is still only a fraction of the overall London office market.
- 5.14 To account for the differences in commercial values at a local level, we have taken a base value for workspace in outer London, and increased or decreased the value based on local traditional office market trends in each of the clusters.

### Development Costs

- 5.15 We outline below the assumed development costs for the site assessments. These assumptions are based on BCIS, alongside evidence from comparable schemes and in-house expertise.

**Table 9: Base Build Costs**

Item	Rate	Basis
Residential	£1,800 psm	Based on BCIS/in-house expertise, and applied to GIA
Business	£1,500 psm	

**Table 10: Other Development Costs**

Item	Rate	Basis
Development Contingency	10%	Industry standard assumption. Applied to demolition, Build, Infrastructure and Landscaping Costs
Professional Fees (% of build cost)	12%	Industry standard assumption. Applied to Demolition, Build, Infrastructure and Landscaping Costs
Finance	6%	6% interest rate, assuming 100% debt funded.
Developer's profit	Private Residential 20.00% on Sale  Affordable Residential 6% on cost Commercial 20.00% on cost	Industry standard assumption. Blended to give overall rate of 20% on cost

5.16 We have not allowed for planning costs. Haringey's CIL Charging Schedule will come into force in November 2014. There are three borough charging zones as set out below. A Mayoral CIL charge of £35psm (Zone 2) is also payable on most new development.

**Table 11: Community Infrastructure Levy Rates**

Item	Rate	Basis
<b>Mayoral CIL</b>	£35	Payable on most new development. Charge based on net additional floorspace. Applied to 50% of proposed floorspace to account for existing use. Only applied to private resi
<b>Borough CIL Commercial</b>	Nil	Nil rate
<b>Borough CIL Residential Eastern Zone</b>	£15	Cluster 1, 3 and 4. Charge based on net additional floorspace. Applied to 50% of proposed floorspace to account for existing use. Only applied to private resi
<b>Borough CIL Residential Central Zone</b>	£165	Cluster 2. Charge based on net additional floorspace. Applied to 50% of proposed floorspace to account for existing use. Only applied to private resi.

## Viability Assessment Results

Table 12: Viability Based on Current Values

Cluster	1		2		3		4a		4b	
	Industrial		Industrial		Industrial		Industrial		Industrial	
Existing commercial use										
Rent / Sqm	£100	£80	£70	£70	£70	£70	£90	£90	£90	£90
Yield	8	8	8	8	8	8	8	8	8	8
Existing Value / Sqm	£1,220	£970	£850	£850	£850	£850	£1,080	£1,080	£1,080	£1,080
<b>New workspace Type</b>										
	Studio	Traditional Office	Studio	Traditional Office	Studio	Traditional Office	Studio	Traditional Office	Studio	Traditional Office
Total Cost PSM	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100
Total Value / Sqm	£2,610	£2,600	£1,740	£2,010	£1,770	£2,040	£2,600	£2,040	£2,600	£2,300
Balance / Sqm	£810	£500	£60	£90	£60	£330	£790	£60	£800	£200
Existing / Future Use Value	Residential	Residential	Residential	Residential	Residential	Residential	Residential	Residential	Residential	Residential
	£410	£720	£570	£1,060	£920	£1,190	£280	£1,140	£280	£880
<b>Residential</b>										
Total Cost PSM	£3,070	£3,040	£2,820	£2,820	£2,820	£2,820	£2,960	£2,960	£2,930	£2,930
Blended 50 / 35 / 15	£4,160	£3,700	£2,750	£2,750	£2,750	£2,750	£3,550	£3,550	£3,380	£3,380
Resi Balance / Sqm	£1,090	£660	£70	£60	£70	£70	£590	£590	£450	£450
Existing / Future Use Value	Residential	Residential	Residential	Residential	Residential	Residential	Residential	Residential	Residential	Residential
	£130	£310	£920	£920	£920	£920	£490	£490	£630	£630



**Table 13: Sensitivity testing- 10% increase in values**

Cluster	1		2		3		4a		4b	
	Industrial		Industrial		Industrial		Industrial		Industrial	
Existing commercial use										
Rent / Sqm	£110		£90		£80		£90		£90	
Yield	8		8		8		8		8	
Existing Value / Sqm	£1,340		£1,070		£940		£1,190		£1,190	
<b>New workspace Type</b>										
	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>
Total Cost PSM	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100
Total Value / Sqm	£2,880	£2,860	£2,420	£2,220	£1,910	£1,950	£2,860	£2,250	£2,860	£2,530
Balance / Sqm	£1,070	£760	£620	£110	£110	£160	£1,050	£150	£1,060	£430
Existing / Future Use Value	£270	£590	£450	£950	£830	£1,090	£130	£1,040	£130	£760
<b>Residential</b>										
	<b>Residential</b>		<b>Residential</b>		<b>Residential</b>		<b>Residential</b>		<b>Residential</b>	
Total Cost PSM	£3,140		£3,110		£2,870		£3,020		£2,990	
Blended Value 70 / 15 / 15	£4,580		£4,070		£3,030		£3,910		£3,720	
Resi Balance / Sqm	£1,430		£960		£160		£880		£720	
Existing / Future Use Value	£90		£100		£780		£300		£460	

Table 14: Sensitivity Testing-30% increase in value

Cluster	1		2		3		4a		4b	
	Industrial		Industrial		Industrial		Industrial		Industrial	
Existing commercial use										
Rent / Sqm	£130		£100		£90		£110		£110	
Yield	8		8		8		8		8	
Existing Value / Sqm	£1,590		£1,260		£1,110		£1,400		£1,400	
<b>New workspace Type</b>										
	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>	<b>Studio</b>	<b>Traditional Office</b>
Total Cost PSM	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100	£1,800	£2,100
Total Value / Sqm	£3,400	£3,380	£2,860	£2,620	£2,260	£2,300	£3,380	£2,660	£3,380	£2,990
Balance / Sqm	£1,590	£1,280	£1,060	£510	£460	£200	£1,570	£550	£1,580	£890
Existing / Future Use Value	£10	£310	£200	£750	£650	£910	£170	£850	£180	£510
<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>	<b>Residential</b>
Total Cost PSM	£3,290		£3,240		£2,970		£3,150		£3,110	
Blended Value 70 / 15 / 15	£5,410		£4,810		£3,580		£4,620		£4,390	
Resi Balance / Sqm	£2,120		£1,570		£610		£1,470		£1,280	
Existing / Future Use Value	£530		£310		£500		£70		£120	

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## Opportunities to Subsidise Workspace Development

- 5.17 Based on the above assessments we have undertaken a further analysis to understand whether there is the potential to deliver a form of mixed use development that overcomes any negative value relationships that may act as a barrier to future workspace delivery.
- 5.18 Based on the cost and value parameters established we have calculated a ratio of the residential floorspace needed to subsidise workspace, this has been calculated at current values, then on the assumption that values will increase by either 10% or 30%. These calculations establish (on a per sqm basis):
- The existing use value
  - The 'residual' value of Workspace after the Existing Use Value is taken into account
  - The value of residential development
  - Whether there is sufficient value in residential development to offset the negative value in the workspace. This returns a:
    - "Yes" where the residential value is greater than the workspace loss
    - "No" where there residential value is lower than the workspace loss
    - "No" where both values are negative
    - "Not required" where both values are positive
  - At this point we then identify where there is:
    - No need to cross-subsidise (i.e. both return a positive value)
    - the ability to cross-subsidise (i.e. the residential value is positive and the workspace negative)
    - no opportunity to cross subsidise (i.e. both are negative values).
  - It then calculates the amount of workspace (WS) each sqm of residential can subsidise in scenarios where the residential residual value is above the loss made on workspace.
  - Or, it calculates the amount of residential needed to cross-subsidise 1 sqm of workspace where the residential value is positive but below the loss made on workspace.
- 5.19 The results of the three scenarios are summarise in the table below.
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Table 15: Cross-Subsidy Assessment

	Cluster 1		Cluster 2		Cluster 3		Cluster 4	
	Studio	Traditional Office	Studio	Traditional Office	Studio	Traditional Office	Studio	Traditional Office
<b>At Current Values</b>								
Existing Use Value	1221	1221	970	970	854	854	1078	1078
Workspace Surplus / Deficit Future Use Value	-411	-770	-570	-1458	-918	-1867	-283	-1137
Residential Balance	1050	1050	565	565	-670	-670	-192	-192
Cross subsidy available/ sufficient	Yes	Yes	No	No	No	No	No	No
SQM WS one SQM Resi can subsidise	2.55	1.36						
SQM Resi required to Cross Subside 1 SQM WS			1.01	2.58				
<b>10% Value Increase</b>								
Existing Use Value	1221	1221	970	970	854	854	1078	1078
Workspace Surplus / Deficit Future Use Value	-98	-454	-298	-1235	-692	-1697	28	-872
Residential Balance	2064	2064	1476	1476	-7	-7	570	570
Cross subsidy available/ sufficient	Yes	Yes	Yes	Yes	No	No	Not req'd	No
SQM WS one SQM Resi can subsidise	21.16	4.55	4.96	1.20				
SQM Resi required to Cross Subside 1 SQM WS								1.53
<b>30% Value Increase</b>								
Existing Use Value	1221	1221	970	970	854	854	1078	1078
Workspace Surplus / Deficit Future Use Value	425	57	143	-912	-344	-1479	548	-463
Residential Balance	2711	2711	2035	2035	304	304	974	974
Cross subsidy available/ sufficient	Not req'd	Not req'd	Not req'd	Yes	No	No	Not req'd	Yes
SQM WS one SQM Resi can subsidise				2.23				2.10
SQM Resi required to Cross Subside 1 SQM WS					1.13	4.87		

- 5.20 The results show a mixed relationship between residential and workspace values both with clusters and between them. For example, under current value assumptions:
- In Cluster 1 1sqm metre of residential development could cross subsidise 2.55sqm of studio workspace.
  - In Cluster 2 2.58sqm of residential development is required to cross subsidise 1sqm of office.
  - In Clusters 3 and 4 no cross subsidy is achievable.
- 5.21 Generally it can be seen that Cluster 1 may offer the best opportunity to provide new workspace under current conditions, with the potential ofr sufficient value to be achieved from residential development to cross subsidise workspace provision.
- 5.22 Cluster 3 is the most challenged location to deliver workspace without some form of alternative intervention to offset costs, requiring a value increase of 30% before residential development may achieve a sufficiently large profit to potentially provide a cross-subsidy. Even with a 30% value uplift it is likely to require a significant level of residential development to create enough value.
- 5.23 Encouragingly for Clusers 2 and 4 a 10% increase in values would see a cross subsidy potentially become achievable, albeit to provide office space in Cluster 4 it would require 2.5 times the level of residential space to support the commercial delivery.

## 6. Conclusions and Summary

- 6.1 Haringey has a significant and varied portfolio of workspace locations with a range of workspace types available.
- 6.2 Factors such as a changing residential market, targeted regeneration, a changing business base, emerging education clusters and lifestyle changes are impacting all clusters to some degree. These factors are likely to become more influential in response to market shifts from other areas in inner London, significant upgrade of the Victoria Line, growth of employment at Kings Cross, a short journey away and focused regeneration strategies for Tottenham Hale and Tottenham more generally. The borough also exhibits a growing presence of newer SME activities relating to creative, arts and fashion relating business.
- 6.3 Haringey presents a host of opportunities in terms of its wider offer. For example Wood Green already has an established cultural quarter with Chocolate Factory and Mountview Academy and other recent sites. Similarly, South Tottenham is increasingly coming to be known to be for its diversity of its business offerings. However, it can be expected that a 'case-sensitive' approach to the tenant market will be required in the near and medium term.
- 6.4 Some of the sites such as Pinkham Way, Stroud Green and Gourley Triangle have limited workspace drivers to support future workspace delivery.
- 6.5 The following table summarises findings by cluster, key change indicators and drivers, and accordingly the potential future workspace offerings.

Cluster	Sites	Change indicators	Potential future workspace
1	Haringey Warehouse District and Greater Ashfield Road	<ul style="list-style-type: none"> <li>- Public realm initiatives</li> <li>- Strong concentration of artists and designers.</li> <li>- Studio facilities (rehearsal studios)</li> <li>- Live- Work spaces</li> <li>- Traditional office spaces.</li> </ul>	Light Industrial Managed workspace Studio Spaces
2	Haringey Heartlands	<ul style="list-style-type: none"> <li>- Cluster of creative industries</li> <li>- Workspace group presence</li> <li>- Strong local resi market</li> </ul>	Studios; co-working, small office

Cluster	Sites	Change indicators	Potential future workspace
		<ul style="list-style-type: none"> <li>- Local town centres</li> <li>- Haringey Heartlands redevelopment.</li> </ul>	
	Wood Green Metropolitan Town Centre	<ul style="list-style-type: none"> <li>- Strong retail and high street type business concentration</li> <li>- Potential civic centre redevelopment</li> <li>- Haringey Heartlands and Wood Green redevelopment.</li> <li>- Future Crossrail 2 Station</li> </ul>	Localised offices, co-working spaces
3	North Tottenham	<ul style="list-style-type: none"> <li>- Peacock industrial estate redevelopment</li> <li>- Spurs redevelopment</li> <li>- CHENEL relocation plans</li> <li>- Technical college in Tottenham Hotspurs/Spur</li> </ul>	<p>Studios; co-working, small office</p> <p>Localised offices, co-working spaces</p>
4	Cluster 4a-High Road Corridor	<ul style="list-style-type: none"> <li>- Active high street environment- CHENEL, BG Arts Centre, Leisure Centre, relocation of McAslan architects,</li> <li>- Growing student population</li> </ul>	Managed workspace, co-working, localised office space.
		<ul style="list-style-type: none"> <li>- Lawrence Road- Clothing and creative industries</li> <li>- Good post-industrial built stock in places</li> </ul>	<p>Live-work units</p> <p>Managed workspaces</p>
	Cluster 4b-Tottenham Hale and South Tottenham	<ul style="list-style-type: none"> <li>- Small scale concentration of artists and small office spaces, informal live work spaces</li> <li>- Mill Co Workspace pilot project</li> <li>- Council ownerships</li> <li>- Media coverage of live work</li> </ul>	<p>Site- 11a Managed workspace, co-working</p> <p>Site 11- incubator or accelerator, requires an institutional sponsor</p> <p>Site 12 and 13: Studios, small office spaces, live work.</p>

Cluster	Sites	Change indicators	Potential future workspace
		<ul style="list-style-type: none"> <li>- Rising workspace prices in Hackney and Islington</li> <li>- Future Crossrail 2 station.</li> <li>- Student housing in place</li> <li>- Victoria Line upgrade</li> <li>- Connections to Kings Cross Knowledge Quarter and Stratford Media Hub</li> <li>- Proposed four tracking</li> <li>- Life sciences, green economy, knowledge economy corridor</li> <li>- Rising prices in Hackney and Islington</li> <li>- Tottenham Hale regeneration</li> <li>- New residential</li> </ul>	



*This assessment has been carried out by GVA to inform planning policy development and does not represent a formal valuation of any of the sites addressed. Assessments have been carried out based on notional development schemes outlined and prepared by Haringey Council officers. These identified broad physical arrangements, derived expected floor areas and indicated the mix of uses. Residential, employment and retail space values have been determined based on a review of prevailing values in local market areas within the Borough. Standard construction and development costs have been applied. Scheme evolution would be based on independent architectural and cost consultancy advice. Any site remediation or atypical preparation costs would be confirmed through site specific investigation and costings. The advice within this report is exempt from the current RICS Appraisal and Valuation Standards and as such cannot be regarded as, or relied upon as, a valuation*