

DRAFT

**WALTHAM FOREST
EMPLOYMENT STUDY**



GORT SCOTT

A study prepared for LB Waltham Forest by
Gort Scott in April 2013

contact:

Fiona Scott
Gort Scott Ltd
The Print House
18 Ashwin Street
London
E8 3DL
UK

E: fiona@gortscott.com

T: 020 7254 6294

www.gortscott.com

with thanks to:

GLA: Mark Brearley, Jamie Dean and Sarah
Considine

CONTENTS

INTRODUCTION

CONTEXT

2. SURVEY AREA

3. POLICY CONTEXT

4. DEVELOPMENT CONTEXT

5. WORKSPACE CONTEXT

SURVEY

6. SURVEY METHODOLOGY

7. SURVEY STATISTICAL OUTCOMES

8. SURVEY NARRATIVE OUTCOMES

CONCLUSIONS AND RECOMMENDATIONS

9. CONCLUSIONS

10. RECOMMENDATIONS

INTRODUCTION

Background

Industrial areas in London are not well-understood. Most people have no idea what is made and assembled in their borough, because industrial areas are unwelcoming and do not have a public face. It is difficult to gain an appreciation of their scale and purpose without observing them first hand. This project provides the opportunity to enquire into the scale of industrial uses and outputs in two key employment areas in LB Waltham Forest. We aim to understand the variety of different types of business in the area, establish contacts wherever possible, and communicate our findings in a way that is both robust and accessible.

The ambition is that this study will help shift perceptions of the industrial areas in the borough, emphasising their positive contribution to the character and identity of the area. Further, the aim is to boost business, deliver growth and provide the basis for creating new jobs in the Borough.

Previous experience working on the Blackhorse Urban Design Framework revealed a rich variety and sometimes surprising range of activities in the industrial areas at the north of the Borough. However, the historic industrial and manufacturing bases in London, such as those in the Upper Lea Valley in LB Waltham Forest, are increasingly under pressure from commercial housing development and as a consequence of policies to address a London-wide housing shortage. The change of use and, crucially, even the threat of change of use, potentially impacts levels of employment and economic activity, business rates revenue, and undermines the continuity of local skills. With nowhere to go, the impact on the

manufacturing base in London, as well as nationally, is also a concern.

The two areas included in this study are Blackhorse Lane Area, and towards the south of the Borough, areas around Argall Avenue and Lea Bridge Road.

The outcomes of this study are intended to assist in informing pre-application advice in respect of proposed developments within the Blackhorse Lane area, and also to inform the draft Blackhorse Lane AAP. Outcomes with respect to the study areas in the South of the borough are intended to help guide policies to protect SIL and Borough Employment land.

Team

The team is led by Gort Scott an architecture and urban design practice, and includes the Centre for Advanced Spatial Analysis at University College London (CASA at UCL).

Team Members:

Gort Scott Architects

Project lead
Research and survey

Centre for Advanced Spatial Analysis (CASA)

Mapping support

CONTEXT



- 2 SURVEY AREA
- 3. POLICY CONTEXT
- 4. DEVELOPMENT CONTEXT
- 5. WORKSPACE CONTEXT



2 SURVEY AREA

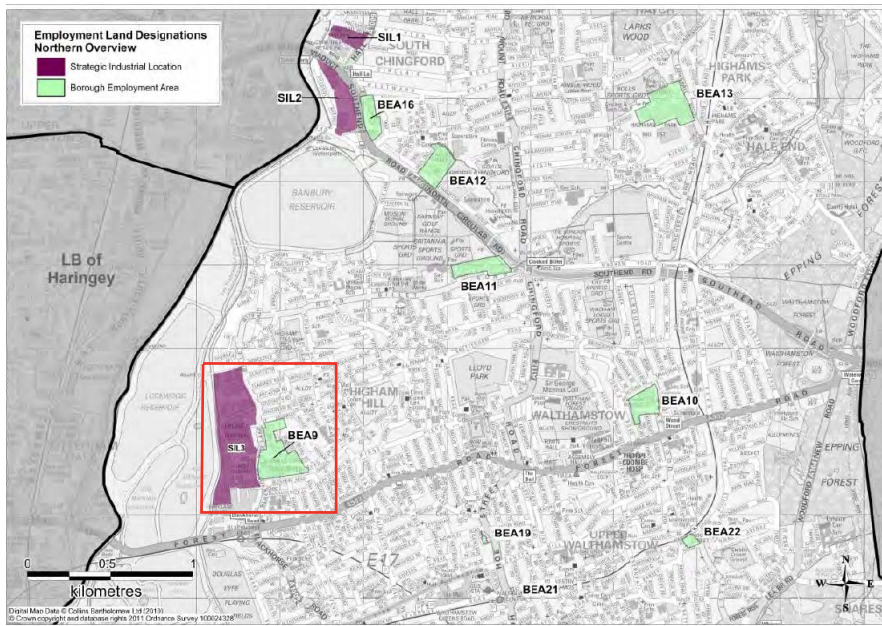
The site area, shown on the following pages, was chosen in consultation with LBWF.

Northern area / Blackhorse Lane area:
SIL 3,
BEA 9

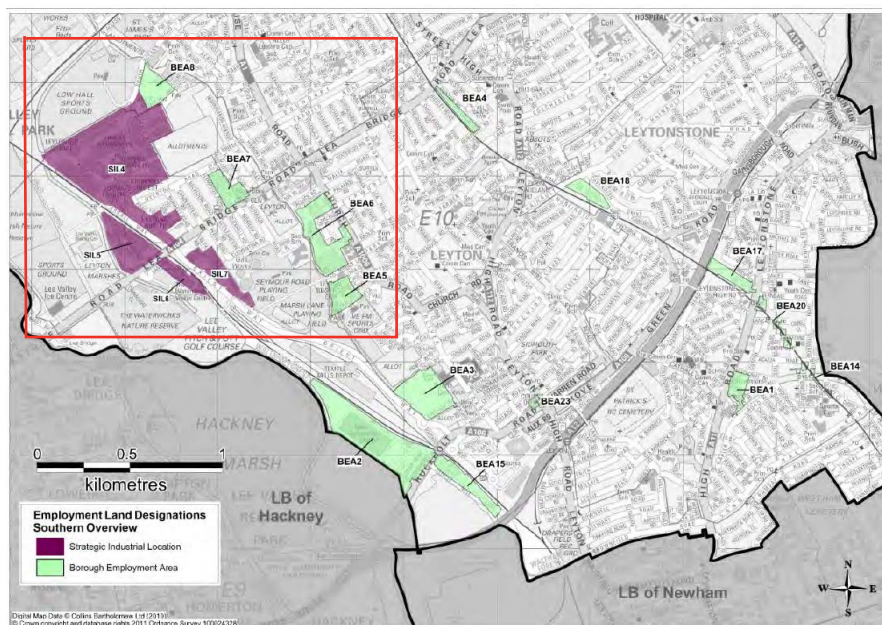
It includes the Strategic Industrial Land (SIL) and Borough Employment Land (BEA) designations, as follows:

Southern area / Lea Bridge Road area
SIL 4, SIL 5, SIL 6, SIL 7
BEA 5, BEA 6, BEA 7, BEA 8

RIGHT: Strategic Industrial Locations and Borough Employment Areas- LBWF Core Strategy Northern Overview



RIGHT; Strategic Industrial Locations and Borough Employment Areas- LBWF Core Strategy Southern Overview





3 POLICY CONTEXT

3.1 Strategic Industrial Lane: SIL

Strategic Industrial Land is protected as designated industrial area within the London Plan and the LB Waltham Forest Core Strategy. It is designated for industrial uses, with which residential development is deemed to be incompatible. De-designation and changes of use outside industrial use classes can only be considered in consultation with the GLA.

The boundary of the SIL in Blackhorse Lane was recently reviewed and some land, (known as Station Hub) opposite Blackhorse Road station was released for mixed use development, as established through the London Plan and Core Strategy.

3.2 Borough Employment Area: BEA

Borough Employment Land is protected by local designation. Within local planning policy, use classes in BEA can currently be changed via the planning application process where certain criteria are met. In key growth areas, such as Blackhorse Lane, there is scope for a wider range of uses in BEAs than in SIL, however mixed use developments need to secure an uplift in employment numbers in order to be allowed.

3.3 Blackhorse Lane AAP and UDF

The vision for Blackhorse Lane as outlined in the AAP is:

"The long-term vision is to evolve Blackhorse Lane into a mixed-use area, comprising a range of housing, interspersed with small-scale local business/commercial spaces and public open spaces. Existing built fabric and cultures are retained and characterise the new neighbourhoods, creating meaningful desirable places to live and work. Residents and employees have access to resources and opportunities

locally, offering betterment and wealth generation. Unique resources such as the Lee Valley Regional Park and the phenomenal Walthamstow Wetlands are integrated into a positive public realm framework, designed to encourage social interaction and creating access for all. New developments are well integrated, demonstrate high levels of environmental sustainability, and enhance the image of the area."

The AAP is supported by a number of documents including an Urban Design Framework (UDF).

As previously described, the AAP and UDF both proposed the release of some of the SIL designated land opposite Blackhorse Road station.

BEA9, known as the Sutherland Road area, is protected for employment uses under the Borough's planning policy, however the UDF and AAP both propose that part of BEA9 is released for residential development, that will work alongside employment uses, as part of the regeneration of the area.

The draft AAP which is undergoing its final round of consultation at the time of writing proposes the following preferred uses on Station Hub and Sutherland Road sites:

Station Hub:

_demolition of approximately 30,000m² industrial /commercial space

_1000 new residential units

_reprovision of 4,550m² new commercial / retail/ social space

Sutherland Road:

_demolition of 16,000m² industrial/ commercial space

_908 new residential units
_5,486m2 new B1 commercial space
_1,100m2 new retail space

The status of employment use in the majority of BEA9 at Sutherland Road is described as follows:

“Given the employment designation that covers the area, and the cumulative impact successive residential permissions have had on changing this character, it is important that future proposals maximise the provision of new, fit for purpose B1 business space that makes a positive contribution towards a vibrant mixed use area. Proposals will be expected to demonstrate an uplift in employment levels on site and also that the level of fit for purpose B1 space provided is the maximum that can be secured on viability grounds, as part of a high quality development that offers wider benefits. Whilst it is recognised that providing new B1 business space impacts on a schemes viability, the Borough Employment Area designation that covers the site means that the Council will place high priority on the need to provide new, fit for purpose business space.”

The status of employment use in Station Hub is less clear than in BEA9 (Sutherland Rd) and many of the existing employment uses are not mentioned, only one particular building:

“5 Blackhorse Lane is home to a number of valuable businesses providing local jobs. However, the ground floor frontage has been earmarked for development of new retail uses . Any new development proposals will therefore need to secure the relocation of existing employers locally to ensure our objective that Blackhorse Lane is a place to do business and for creative businesses is not compromised. Similarly, relocation of other existing businesses

within the borough, such as those at Ferry Lane Industrial Estate, will be sought.”

AAP Policy BHL 6 Employment reads as follows;

“The role of the Blackhorse Lane area as a major employer of local people will be retained and enhanced by:

A) providing new high quality B1 floorspace for small/ medium businesses and creative industries as part of mixed use developments in the sites identified in Section 4: Opportunity Sites.

Where provided, new floorspace should;

- offer a flexible floor plate including minimal supporting columns, generous floor

to ceiling heights, wide doors and corridors, and a suitable floor loading capacity

- provide suitable access, servicing and parking for commercial vehicles

- be of a sufficient scale to ensure the continued employment function of the area is not undermined; giving due consideration to the indicative targets for new employment floorspace set out in section 5.3 of this document

B) directing general industrial (including green industries), storage, manufacturing and distribution uses to land designated as SIL. Through partnership working, the Council will explore opportunities for investment in SIL through matters such as improved signage, access and public realm.

C) requiring redevelopment of any other existing employment land for non employment or training purposes to demonstrate that the existing space is no longer fit for purpose, and has no reasonable prospect of coming forward for future employment use. Evidence should be provided that:

- the site has been appropriately advertised

at a price in line with local market values, with terms and conditions that are reasonable and attractive to potential business.

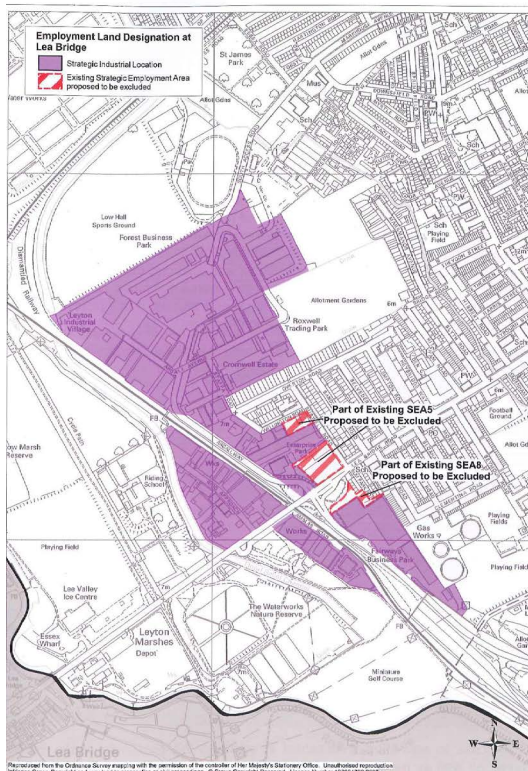
3.4 Southern Area Lea Bridge Road and Argall Avenue planning context

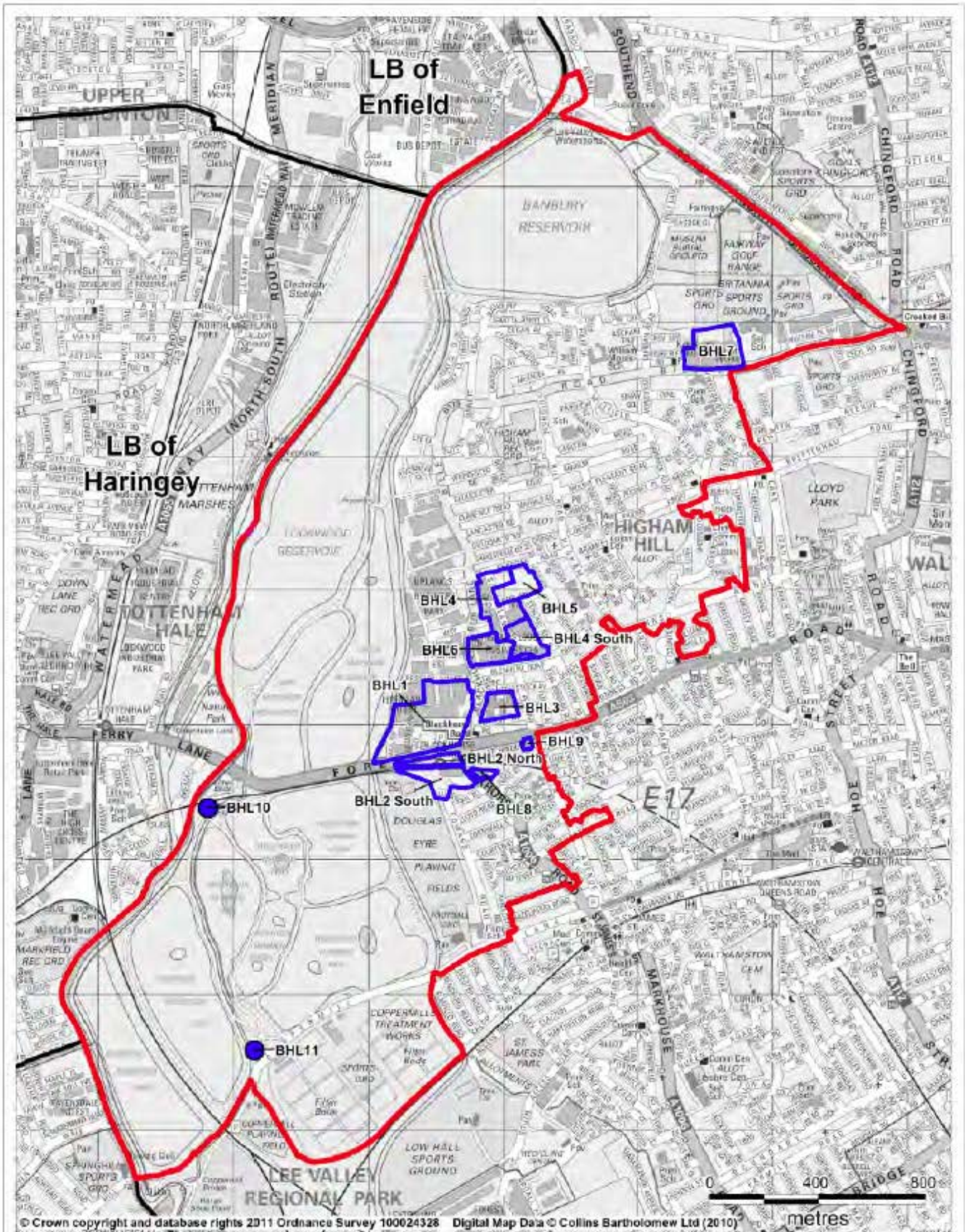
Small areas of land have been de-designated from SIL in the Core Strategy, as per the below plan.

3.5 Industrial Land across London

The map overleaf shows Industrial Land use classes across London, and shows Tottenham's strategic location within the Upper Lea Valley. Although some of Tottenham's businesses are locally-orientated, the majority have a relationship with London as a whole, and therefore the strategic position and context of diminishing Industrial Land across London needs to be taken into account.

Figure 23 Lea Bridge Gateway Strategic Industrial Location





© Crown copyright and database rights 2011 Ordnance Survey 100024328 Digital Map Data © Collins Bartholomew Ltd (2010)



Waltham Forest

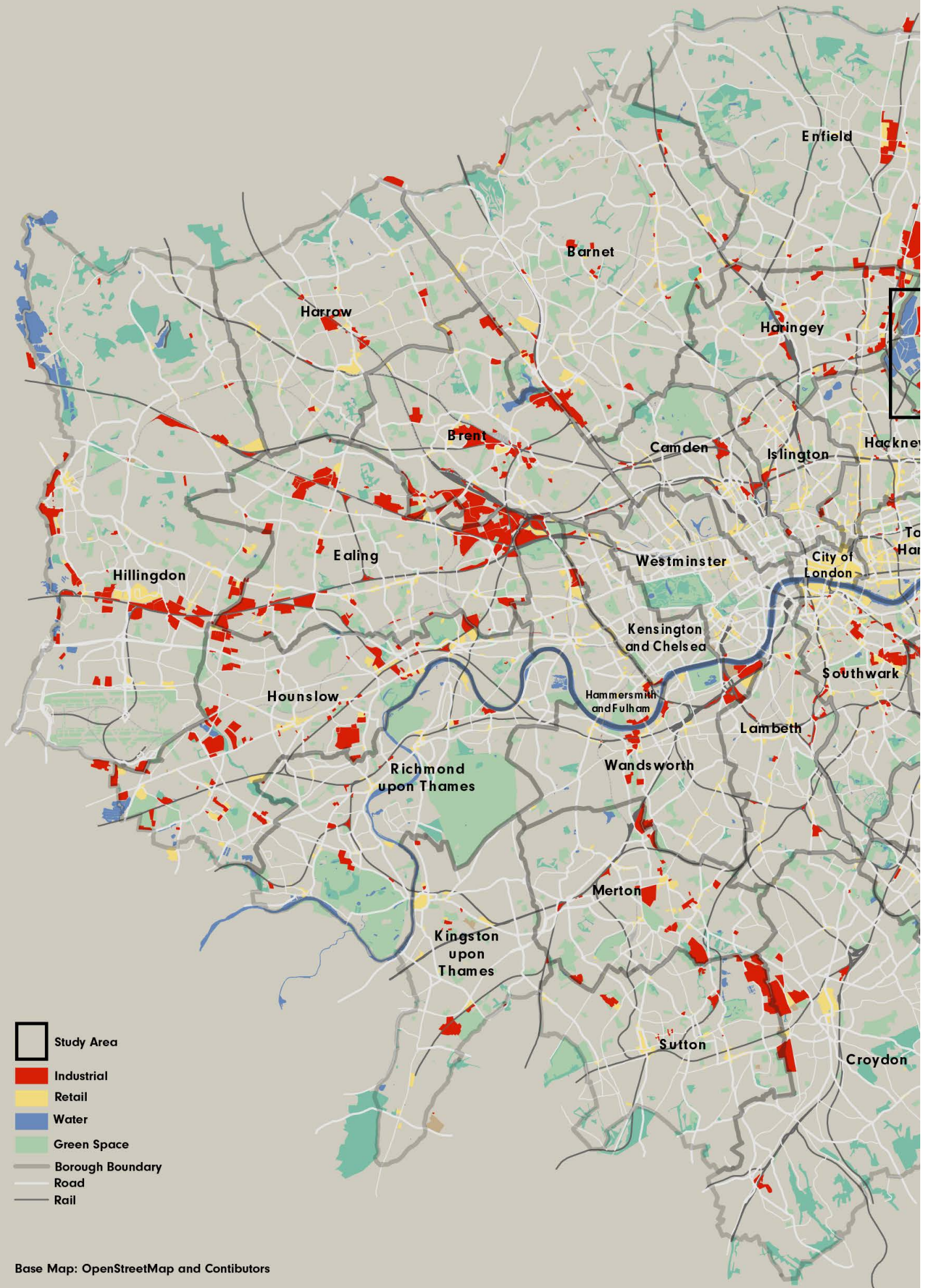
Blackhorse Lane Area Action Plan: Key Sites

- Key Site
- AAP Boundary
- Key Site





Industrial London



4 DEVELOPMENT CONTEXT

4.1 Northern area / Blackhorse Lane

The Borough's intention is that Station Hub and Sutherland Road will together form part of exemplary mixed-use development that retains the importance of the area as an employment hub.

It has been acknowledged that despite de-designation from SIL, the area known as Station Hub area is still at the time of writing a successful employment area supporting many jobs. Therefore the question of how to manage change here is paramount.

Development proposals are currently being submitted as part of pre-application planning processes for three out of the five sites in Station Hub, and a full planning application for one of the key sites has recently been submitted.

Within BEA9 (Sutherland Road), successful outline planning applications and full planning applications have been made by landowners and developers, which have resulted in change of use to residential-led uses on a large proportion of the BEA9 site area. Currently this results in a substantial loss of employment space as many sites lie empty awaiting future development.

4.2 Outer London Fund

Blackhorse Lane was awarded £1069500 in funding from the OLF, and the Borough has also provided match funding for improvements in Blackhorse Lane which include wayfinding from Blackhorse Road station to and from the industrial areas in SIL3. Proposals also include improvements to industrial frontages and signage, and the interface between the industrial estates and surrounding public realm. Also within the OLF work is the Blackhorse Workshops, which seeks to provide facilities and

a venue for local people and small businesses to manufacture and learn about making things.

4.3 Walthamstow Wetlands

The Walthamstow Wetlands project involves improving the area around the Lea Valley reservoirs to the West of the industrial areas. It could potentially have a very positive impact on the character and appeal of the area as a place to work. The Wetlands project will see the 200 hectare site of the Walthamstow Reservoirs transformed into a distinctive urban wetland and nature reserve.

The project won Heritage Lottery Funding of £288,000 in order to develop the scheme further. An application for HLF Round 2 funding for £3.5m will be made in the future and match-funding has been secured from Thames Water.

4.4 Southern area/ Lea Bridge Road and Argall Avenue

At the time of writing no developments for the sites within the SIL area, or the small areas recommended for release from SIL, were being considered by the Planning department. There is one active planning application for a nearby site at 162-168 LBR on the corner with for 8 self contained flats

5 WORKSPACE CONTEXT

Part of the commission was to meet with providers of different types of workspace to look at the range of opportunities in the Borough.

Meetings were held with the following companies who set up and manage different types of workspace and who specifically took an interest in London Borough of Waltham Forest

1. ACAVA - Artist studios
2. WORKSPACE – spaces for SMEs
3. SPACE STUDIOS – Creative businesses and artists
4. LEE VALLEY ESTATES - commercial developer and agent

The meetings were attended by Gort Scott and Alexis Adonis, Project Manager, Economic Development, from Waltham Forest.

5.1 Acava

Acava is an educational charity set up in the 1970s – their remit is to provide studios for public benefit. They currently operate 24 buildings including one in Berlin. The charity owns three of its buildings outright, and it built its current headquarters in Ladbroke Grove in 1999. Acava inhabits a range of buildings from existing to new-build.

The studios pay for themselves, and Acava receives arts funding for its other work. Acava works with regeneration agencies, developers, RSLs, health services and boroughs.

Acava sets up studios in buildings with a number of differing circumstances: buildings may be in a poor state of repair or not serving a useful purpose, or have a short lease left, or they may be difficult to occupy with other means. The circumstances tend to be opportunistic.

Acava only operates with short leases, often 18 months or 2 years. They have also made use of Meanwhile Leases.

It is clear that artists can contribute a lot to an area - they come and go a lot and make use of local traders, suppliers and cafes, and bring other activity to an area. As a result Acava has a lot of interest from regeneration schemes.

Acava always vacates premises immediately on short leases and normally in a better state of repair than they were originally. If leases are long enough they will invest in improvements to properties.

If considering a longer lease, it needs to be understood that the leases to artists are based on CPI yearly increases, rather than open market rent review. Therefore if an area goes up in value a lot, rental income may not reflect this. Acava cannot take on leases that are based on yearly open-market rent review.

Acava also acts as a consultancy, and was recently working with Harlow new town, to turn empty shops and units above shops into a network of artists' studios. There are now 21 artists studios, a gallery and a new community arts space. They also provided support, creating a CPD network, training and linking to local employers. (Approx fee £35,000/ paid for by a regeneration agency).

Acava has a waiting list of about 1500 artists. Artists are only accepted as 'members' onto the waiting list after a vetting process.

Rents at the studios in their newbuild HQ are for established artists and are £15/ft² inclusive (except power). Harlow is £5/ft² and Bermondsey is £7/ft².

Contact: Duncan Smith
ACAVA 54 Blechynden Street London
W10 6RJ
telephone 020 8960 5015

5.2 Workspace

Workspace has owned Uplands business park in the Blackhorse Lane area for about 16 years (since about 1997).

Workspace manages about 7million ft² of property in London and has about 4600 businesses as tenants. Workspace has a wealth of knowledge and data about small businesses. 97% of London businesses employ fewer than 10 people.

For the optimum Workspace business model to work and provide managed workspace, a single building needs to be at minimum 3500m², to allow for a café, and reception as well as offices.

Workspace understands rent as a proportion of turnover (approx 5-7%). Businesses pay for what they can afford, and this is likely to change over the years.

Rather than focussing on price/ft², they will market individual, serviced units with various benefits such as café, meeting rooms etc, for a certain price, based on what they would expect that company size to be able to afford. This means that in their building in Oval they can get up to £32/ft² for spaces that if leased by area would only expect to get about £15/ft². Ian explains this as, "we are not selling floorspace". They are selling something more.

Leases are between 6 months and 3 years normally, but there are many different types of arrangements to suit different businesses and premises.

Workspace sees 25% 'churn' per year- most of them are moving within the organisation to different sizes and types of workspace.

Workspace's headquarters are in Oval, in what used to be a large taxi factory. Here they own a 6 acre site which was bought in 2004 and completely refurbished. Bought for £25million, it is now worth £55million. It was recently audited to clarify that despite large amounts of investment it has been valued as a positive asset.

This site is about the same size as Uplands. There are 1600 people employed on the site.

The site creates a huge amount of footfall in the area, with lots of people coming and going, using local shops and services. Most spaces in the buildings are between 300ft and 750ft². The main, old industrial building is very deep plan with 60,000ft² per floor. Dark spaces in the plan have been turned into a gym and meetings hub/ wifi space.

The gym lets for £12/ft² and this is also seen as a marketing tool to attract businesses.

Space in their Oval headquarters ranges in income/ft² between £8.50/ft and £38/ft².

Criteria for deciding to invest in a place are primarily locational:

- Accessibility and links to other places.
- Socio-demographics
- Any investment being made in transport infrastructure- eg Crossrail is a big one at the moment.
- Other types of investment that might be occurring in the area
- Dynamics of potential clustering of businesses in an area.
- There are also more intangible elements to do with the character of the area, what's going on, if there is any 'buzz', if it is starting to be seen as 'cool' etc. as these are all good signs

Workspace recently bought a space in Brixton: rent was £10/ft² when they bought it. If they invest in the place they can get £18/ft². It takes about 3 years to stabilise post-completion.

Workspace has a list of over 1000 buildings at any one time, which they are looking at as potential places to invest.

contact:

Ian Brazier-Dubber (head of Planning)
Chester House, Kennington Park, 1-3
Brixton Road, London SW9 6DE
T: 020 7369 2395
E: Ian.Dubber@workspace.co.uk

5.3 Space Studios

SPACE was founded in 1968 as a pioneer in supporting artists and London's creativity.

SPACE is a charitable arts organisation providing affordable studios and training opportunities for artists. From SPACE HQ They run an exhibitions programme, creative workshops, a professional development training and a schools and young people programme. They see themselves as providing flexible workspace rather than incubator units.

The charity will buy existing buildings or take out 25year leases. They work with Developers, RSLs and local authorities. The size of space that will work for them is between 800m² and 2500m²

However they will only be able to pay £4/ft² to £5/ft², on something like a 25 year lease. Leases need to be arranged with a capped service charge. Under these circumstances, the studio space pays for itself, and the provision of other services comes out of grant funding.

They often get deals through Section 106 in order to provide affordable workspace, which is seen as a benefit to the area in much the same way as affordable housing.

Space Studios also carries out training programmes, dependent on funding availability.

All-inclusive rents to their tenants tend to be £8- £15/ft², average about £12/ft².

Space's unequivocal view is that there is a massive market in Waltham Forest for 'affordable workspace' for small design offices or artists studios. They are very keen to do something in the area.

They think there is something 'special' about the Walthamstow area, next to the reservoirs, with a very high concentration of creative individuals. They also made clear that they view there is also a logical

progression from Hackney out to Waltham Forest because of the increase in property values.

The kind of project that could be viable for Space at the moment is to buy a building for about £1million. Or a 10 year lease if no capital investment needed, with a rolling break after 5 years.

Contact: Anna Harding
129-131 Mare Street, London, E8 3RH
T: 0208 525 4340
E: anna@spacestudios.org.uk

5.4 Lee Valley Estates

Lee Valley Estates (LVE) is a large development and commercial property management company, established in 1987. The company supports SMEs in the Lee Valley, largely in Haringey and Waltham Forest. They own and manage approximately 1.4million ft2 of space in the Lee Valley area. The company also carries out mixed-use developments delivering housing alongside workspace.

Holdings in the area include Argall Avenue, Unity Works and The Webb site on Sutherland Rd, and part of Uplands business park.

We discussed the future of Blackhorse Lane and Argall Road and their future potential as a place for employment, and new commercial premises. We were told that the primary obstacle to this was a perceived lack of vision determining the long term ambition. Without a coherent vision it is hard for LVE to justify considerable investment in the area due to its current low commercial land values. The coherent vision would have to address the working environment including amenities for employees and better public realm.

Pragmatic obstacles also include poor infrastructure in the industrial area, such as old, low-power and inadequate statutory utilities (gas and electricity cabling) and wireless capability. It would be beneficial if industrial areas could be derisked through investment in infrastructure.

They see the building stock in the area as low quality and delapidated, with little incentive to upgrade. Other obstacles to this include current leaseholders that are on short leases. Therefore these companies have no motivation to invest in the properties or in the area. Leaseholds of less than about 20years would not be conducive to capital investment. Short leases also do not contribute to the capital value of the asset for LVE.

They pointed out that once the LBWF Council move out of Silver Birch House, there will be considerable additional office space available within the SIL.

When asked whether employment-led (rather than residential led) mixed use could ever be viable in the Borough employment areas and SIL, the answer was that in terms of the location it would be viable but without a coherent vision and improved public realm, it would be very unlikely to happen.

To assess the viability of businesses in the area, an evaluation of the number of properties in rent arrears would be beneficial. LVE may be able to contribute information to this.

In the Blackhorse Lane area, Lee Valley Estates currently leases properties for around £5/ft2 or £6.50/ ft2

Contact: Chris Shellard
Lee Valley Estates
Development Manager
T: 0208 808 4070

5.5 Conclusions

The following conclusions are drawn from the conversations with the four providers

1. There is a great deal of interest in the area from the workspace providers we spoke to, and all saw it as an area with growth potential within their fields.

2. There are numerous ways of delivering workspace from short-term and ad-hoc to long-term and high quality. This includes subdivision and reuse of existing commercial properties.

3. Of the four organisations spoken to, there are varied business models for the delivery of work space, including:

- Provision of speculative, new-build commercial space as part of the ground floors of residential-led mixed use developments.
- Provision of largescale speculative, managed business space as part of employment-led mixed use development
- Collaboration with developers or local authority landowners to take on short-term leases to provide short or medium term creative studios, training and cultural outreach.
- Buying and refurbishing buildings for conversion to creative studio space

4. The market is very nuanced: detailed site-specific market research is needed as a basis for new commercial developments. This cannot be determined from high level studies that only focus on historic values and do not take into account changing perceptions of an area.

5. Non-commercial providers can be a useful part of the long-term process of regeneration, bringing in new people and new businesses, who can radically change the perception and character of the area.

6. The potential offer is very varied and can be very specific to an area or a sector. In assessing the viability of commercial floorspace, you cannot just go on blanket market rates/per m². It is necessary to

look at how the commercial offer can be packaged to obtain maximum value.

7. Employment-led mixed use as a development typology (as opposed to residential-led), should be viable in LB Waltham Forest, but would need considerable ground-work to prove that the Borough's vision for the area would facilitate an improved public realm in order to support such developments.

8. Small numbers of units which provide no critical mass of employment space, or which have not been specifically designed around the needs of potential tenants, at the base of some residential units, will be unlikely to be lettable or commercially viable. Neither workspace companies nor charities would wish to manage such spaces.

9. The management of workspace should be considered when assessing the quantity and layout of employment uses. Properly managed workspaces with ancillary services could potentially attract higher value businesses.

10. The market for workspace in Waltham Forest is not just local - connections by the Victoria Line to Blackhorse Lane and proximity to good road networks make it potentially an attractive place for businesses from further afield.

11. It is important to see the future of employment in these areas in the context of recent changes in the Borough, such as changes in demographic and uplifted residential property prices.

12. It was argued that the quality of commercial premises in the area is too low - too old and dilapidated. However, it is very important not to discard the positive characteristics of the area's industrial heritage, which may support and increase the areas desirability in the future. Precedent shows that even very delapidated premises can be refurbished.

SURVEY



6. SURVEY METHODOLOGY
7. SURVEY STATISTICAL OUTCOMES
8. SURVEY NARRATIVE OUTCOMES

6 SURVEY METHODOLOGY

6.1 Principles

The first aim of the survey was simply to understand what kinds of businesses exist in the industrial areas at the moment. Beyond this, the survey was intended to understand the scale of the impact of the industrial areas. This meant that we concentrated primarily on the number of businesses, the number of employees and some measure of the quantity of outputs of each business. Other questions such as why they were located in the borough, and whether business was increasing or decreasing, were secondary.

6.2 Survey design

The survey was designed such that it should be possible to obtain all the information required through a short 2-3 minute conversation with a member of staff at each business.

The method of data collection was initially visiting all the premises on foot and attempting to speak to a manager or supervisor. Where possible follow-up phonecalls and emails were made to try and obtain more data.

6.3 Methodology

6.3.1 Site mapping

A mapping exercise took place, whereby the OS map was verified on site by an individual going checking GPS coordinates. Some parts of the OS were not up to date or were misleading. The hardest part of this was to add all the subdivisions of different units onto the plan. This was achieved through looking at unit numbers, and through looking at plans of buildings displayed in entryways. This important work provided the base map and number of units for the study.

6.3.2 Survey spreadsheet

A survey spreadsheet was designed in Microsoft Excel format. All of the identified units were given a unique number and an individual line on the spreadsheet. Each column represented a different bit of information about the unit.

Many businesses occupied multiple units, and some units were found to be occupied by multiple businesses. On site, these conditions were noted.

6.3.3 Survey on site

The surveyors initially visited properties in pairs, and later individually. The surveys were carried out between 7th February 2013 and 15th April 2013.

Surveyors approached individuals at the door, and asked to speak to a manager. If no manager was available they obtained as much of the survey information as possible from the front-of-house staff and attempted to obtain a contact for the manager.

Where businesses were closed, a second attempt was made at a different date and time, and if still nobody was in, telephone contact was attempted.

6.3.4 Desktop analysis

All of the data from on-site surveys was entered into the survey spreadsheet in Excel, and totals were summarised.

6.3.5 Mapping analysis and GIS

The spreadsheet was used to create a GIS database linked to the plan.

The data in the spreadsheets was used to create maps and infographics.

6.4 Limitations

The survey has a number of limitations:

_ It only represents a snapshot in time:

businesses change, grow and shrink. It is not possible for this survey to determine trends.

_ If premises were closed or operated out of normal work hours it was difficult to find information, even though we returned on different days, it was not possible to return at nights.

_Some units are subdivided in ways that it is hard to ascertain, therefore there could be other hidden units and businesses.

_Businesses were not obliged to respond, and therefore a large number of businesses chose not to respond. For the smaller companies, there may be a factor of illicit business - not wanting to be found. Some larger companies clearly had a bureaucratic system that did not allow junior members of staff to hand out information, and sometimes senior members of staff could not be reached. There appeared to be a view by some of the larger businesses that the information we were requesting was commercially sensitive.

_ The survey was based on what businesses wanted to tell us, therefore facts, such as employee numbers, could be distorted

_The questions about how well a business is doing are inevitably subjective to some extent.

_ There are many different types of business in the area, and they are of many different scales, therefore some questions will have been more relevant to some businesses than others.

_It was rare that we were able to speak directly to the owner of the business, so

7 STATISTICAL OUTCOMES

7.1 TOTAL ALL SURVEYED AREAS:

Please see spreadsheet in Appendix 4 for full data

(gross external from OS map)

Total estimated floor area: 371,803m²
(gross external from OS map)

7.1.1 Unit numbers

Number of units: 821

We counted 821 different units within the survey areas. Many businesses operated out of more than one unit, and the average number of units varied across the different areas between an average of about 1.4 units per business which went down to about 1 unit per business at Station Hub.

However, only for 580 units (or 71%) of the total 821 units could the usage be confirmed. 235 of the units were closed or inaccessible - even though signage may have indicated business occupancy, this could not be verified independently and therefore they were marked as unknown.

7.1.2 Business numbers

Known number of businesses: 365

Extrapolated number: 520

The total number of businesses in 512 of the units was 365.

Extrapolating the data for the **unknown units** in the same proportion as the **known units** would lead to a total number of 520 businesses.

It is important to note that there are more businesses in the area than 365. We were very careful not to assume businesses existed just because a business sign was present, and therefore only counted businesses where there was a very good reason to know they existed on that site.

7.1.3 Floor area

Total ground floor areas : 361,627m²

7.1.4 Number of jobs:

Stated numbers: 3424
(from 226 businesses)

Estimated from observation: 405
(from 65 businesses)

Total stated or counted 4104
(from 291 businesses)

Average floorspace/job 54m²/job
Extrapolated estimate: **5300+jobs**

The average floor space per job was worked out from only the gross external floor areas of the companies for which we have job-number information.

When extrapolated across the floor areas of the different SIL and BEA individually, based on the relevant m²/job for that area, the total number of jobs was estimated at between 5300 and 5500.

As a comparison, The Homes and Communities Agency guidance on Employment densities (second edition 2010) states indicative expected densities as follows:

B2: 36 m²/job (range of 18-60)

B1: (c) 47 m²/job

B8 : 70-80 m²/job (range 25-115)

Therefore the average density in the surveyed areas is similar to that expected of light industry on the whole, rather than warehousing and distribution.

For comparison, food superstores and other high street-type retail activity is around 17-20m²/job, and other retail superstores much lower at 90 m²/job

7.1.5 Jobs per business:

Average jobs / business: 14.1 jobs

The average number of jobs per business varies between different estates. SIL 3 (SEA4) has 29 jobs per business, whereas BEA9 averages around 9 jobs per business. Therefore the majority of businesses are small and micro-enterprises.

Some of the biggest employers were on the Station Hub site, but not exclusively.

Of the larger companies across the area, staff numbers were as follows:

Noble Foods patisserie had 150
Baker Ross toys had 100
Warren Evans had 200
NSL Parking services had 100
Percy Ingle Bakers had 92 jobs on site
Mandora had 85
Momart transportation and De La Creme clothing company had 50
Alfred Dunhill had 50
B+Q and TRS foods had 45
Bates of London launderers had 245
Decra toilet cubicles had 70
TRS international foods had 45
Northfields Linen Hire had 50
GBN Skip Hire had 50

Many of the larger companies such as Allied Bakeries, were unwilling to share information but we speculate that there are about 200 jobs on that site (not included in figures).

67.1.6 Local employees

Average % of employees stated as from Waltham Forest: 48 %

Of the businesses who were able to tell us numbers or proportions of their employees who were 'local' the result was 48% on

average of their total employees ("Local" was defined as within the borough but in reality probably perceived as a closer sphere of influence). The number of local employees varied dramatically, but of the larger companies a high proportion of employees were described as 'local' ("from Walthamstow").

The majority of the smaller companies who responded were owned by local people.

Alfred Dunhill's : 75% of 50

AG Barrs 20% of 40

Momart: 50% of 50

Station hub:

Noble Foods: 66% of 150

Mandora: 75% of 85

Baker Ross: 10% of 100

Hoffman Thornwood: 95% of 35

SIL 4 had the highest proportion of local people at 63% and SIL3 the lowest at 23%. These numbers may not be entirely representative as only a relatively small proportion of companies were able to give us such information (35% of identified businesses).

7.1.7 Businesses by type

Overall, food and drink companies represent the largest number of businesses in Waltham Forest, with 16% in Food and Drink Wholesale/Retail, and 4% in Food and Drink manufacture (total of 20% Food and Drink -related). Other wholesale and distribution/retail was 13% of known units, and Other manufacture was 11% of the known units. The next highest was Car mechanics with 9% of businesses.

The figure for Design/Creative businesses appears low, at 2%, but this is partly because of the nature of the survey: For example Barbican Arts Group Trust

counted as only one Business, whereas we know that it is subdivided into 21 different studios. A number of 'Artisanal manufacture' businesses could also potentially fall under the Design/ Creative. Some notable businesses in this area include 4 different scenery, film and theatre set makers, Factory Settings and Scenery Shop, Jeremy Pegg Ltd and Samac design and build.

7.1.8 Production numbers

See Appendix 2 for full details

Many companies were unwilling or unable to share information about production numbers. We can only speculate as to why this issue was so sensitive. Many smaller companies just didn't have a measure of what they produced. Larger companies appeared to see it as commercially sensitive information.

Nevertheless, some of the numbers are very interesting, including:

- Warren Evans make 300-400 beds per week. (extrapolated to around 18,000 beds per year).
- Skill Max make 1300 dental crowns a year
- DM Watkins make 7-8 specialist canvas stretches a week (extrapolated to 400 canvases per yr)
- Hoffman Thornwood handle 1000 tons of timber a week (50,000 tons a year).
- SEO designs manufacture 150 pairs of classic brogues shoes per week (7500 pairs per year).
- East London Brewing Company makes about 3000pints of beer a week (150,000 a year).
- SAF wholefoods make 250 wraps a day (62,500 wraps a week)

7.2

BREAKDOWN OF STATISTICS BY AREA

Please turn to p.29

UNITS

Industry	No. Units
F&D Wholesale / Retail	88
Clothes/Textile Wholesale / Retail	6
Other. Wholesale/distributor/ Retail	82
F&D Manufacturer	21
Clothes/Textiles Manufacture	18
Other Manufacturer	64
Artisanal Manufacturer Make To order/Specific Skilled M	13
Service Providers / Security	32
Printers	13
Educational / Medical / Religious	29
Design / Creative	11
Construction/supply/Maintenance	25
Rental	7
Automobile / Mechanic.	39
Café	7
Storage / Collection	30
Newspaper TV / Radio / Music	9
Social Work / Charity	17
Total	512
No. of units known to be vacant	48
No. of units from survey that do not exist (Re-Built/ WC/corrido)	19
No. of units moving out / administration	7
No. of units with unknown data & unknown activity	235

Assumed Total no. of Units **821**

Percentage of units where some info is known 71%

BUSINESS

F&D Wholesale / Retail	60
Clothes/Textile Wholesale / Retail	6
Other. Wholesale/distributor/ Retail	47
F&D Manufacturer	13
Clothes/Textiles Manufacture	12
Other Manufacturer	40
Artisanal Manufacturer Make To order/Specific Skilled M	13
Service Providers / Security	26
Printers	11
Educational / Medical / Religious	22
Design / Creative	7
Construction/supply/Maintenance	12
Rental	7
Automobile / Mechanic / Repair shop	35
Café	6
Storage / Collection	26
Newspaper TV / Radio / Music	9
Social Work / Charity	13

Total No. of Businesses (from 510 units) **365**

Businesses who shared staff numbers 226

Businesses where we estimated staff no. 65

Businesses surveyed where we don't know staff numbers 56

Average no. of Units / Business 1.4

JOBS

Total Potential Jobs (from 287 businesses) **4104**

Total Known Jobs 3424

Total Estimated Jobs 405

Total Estimated Offsite Job 261

Total Other Tenants 14

Average no. of jobs / business 14.1

Employees from Waltham Forest (from 127 businesses) 1109

% employees from Waltham Forest (from 127 businesses) 48%

LEFT: chart showing statistics for all surveyed areas together



0 500 M

7.2.1 SUTHERLAND ROAD BEA9

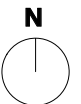
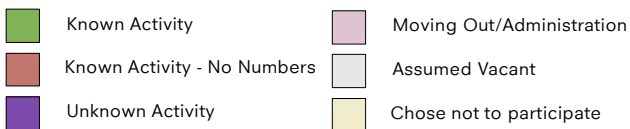
BEA 9 Total Area: 26,373m²
 Assumed inhabited floor area: 10,730m²
 Local workers percentage: 52%

Businesses counted: 39
 Jobs given or counted: **298 jobs**
 (from 33 businesses - 9606m²)
 Average m²/job: 32m²/job

Extrapolated estimate approx **335 jobs**
 (across inhabited floor area)



0 100 M



BEA9 Sutherland Road, located to the west of Blackhorse Lane, has a major new residential development, Papermill Place that has recently been completed at its northern end.

With the exception of a few buildings to the south of the site that are being demolished, the general condition of the units appears to be good. There are also some attractive brick buildings that are very much of their type. Nearly a quarter of the units in the southeast corner are vacant, though the buildings seem in good condition.

Of the businesses located here the poultry wholesale industry is prevalent. With this comes certain environmental impacts such as smell and waste. These businesses complain of the residential development, stating that added traffic has made loading and unloading of goods and the use of forklifts more difficult. The longest resident and one of the biggest employers in this area is Alfred Dunhill, who have been manufacturing smoking pipes here for nearly 25 years.

The uncertainty about development in the area made people skeptical when talking about the future of their businesses. There is a sense of resignation to what is seen as inevitable forced eviction and this is accompanied by frustration. Business owners are disappointed because they see the area as a great place to work. They talk openly about what they see to be a progressive dismantling of the industrial workspace in the area.

This area has by far the largest vacancies in comparison with other areas within this study. For example the nearby Station Hub (SIL3 SEA4) has virtually no vacancies.

Part of the explanation for this is that some sites have development plans, and others have plans in the Planning or Pre-Planning process. It is possible that the rules governing mixed use development in BEAs, which state that existing business units must be shown to be vacant and unviable prior to granting permission for mixed-use development in these areas, have resulted in this area being deliberately vacated.

The level of vacancy here is inconsistent with the rest of the Borough.

The high number of no answer/ unknown in this context also points to a possibly higher number of vacancies, but we did not count vacancies unless we had another reason to assume vacancy such as to let signs or local anecdote.

In this area, the notably high proportions of businesses include Food and Drink wholesale (including meat), automotive-related business and Media (tv/music/etc).

Sutherland Road has a high density of jobs, at 32m² per job.

UNITS

Industry	No. Units
F&D Wholesale / Retail	8
Clothes/Textile Wholesale / Retail	0
Other. Wholesale/distributor/ Retail	5
F&D Manufacturer	0
Clothes/Textiles Manufacture	1
Other Manufacturer	5
Artisanal Manufacturer Make To order/Specific Skilled Maker	2
Service Providers / Security	0
Printers	1
Educational / Medical / Religious	3
Design / Creative	1
Construction/supply/Maintenance	1
Rental	3
Automobile / Mechanic.	5
Café	0
Storage / Collection	0
Newspaper TV / Radio / Music	5
Social Work / Charity	1
Total	41
No. of units known to be vacant	25
No. of units moving out / administration	2
No. of Units with unknown data & unknown activity	23
Assumed Total no. of Units	91

BUSINESS

Type Of Business	
F&D Wholesale / Retail	8
Clothes/Textile Wholesale / Retail	0
Other. Wholesale/distributor/ Retail	4
F&D Manufacturer	0
Clothes/Textiles Manufacture	1
Other Manufacturer	4
Artisanal Manufacturer Make To order/Specific Skilled Maker	2
Service Providers / Security	0
Printers	1
Educational / Medical / Religious	3
Design / Creative	1
Construction/supply/Maintenance	1
Rental	3
Automobile / Mechanic / Repair shop	5
Café	0
Storage / Collection	0
Newspaper TV / Radio / Music	5
Social Work / Charity	1
Other Use (WC/Corridor/Access/Reception)	0
Total No. of known / documented businesses (from 41 units)	39
Businesses who gave us staff numbers	23
Businesses where we estimated staff no.	10
Known active businesses but no data	6
Average no. of Units / Business	1.1

JOBS

Total Known Jobs	270
Total Estimated Jobs	28
Total Estimated Offsite Job	0
Total Jobs counted (from 33 businesses)	298
Average no. of jobs / business (from 33 businesses)	9.0
Employees from Waltham Forest (from 20 businesses)	93
% employees from Waltham Forest (from 20 businesses)	52%

LEFT: chart showing statistics for Sutherland Road BEA9

7.2.2 STATION HUB SIL3. SEA4

SIL3 - SEA4 Total area: 51,526m²
 Assumed inhabited floor area: 46,781m²
 Local workers percentage 39.6%

Businesses counted: 34
 Jobs given or counted: 667 jobs
 (from 23 businesses - 44,631m²)
 Average m²/job: 67 m²/job

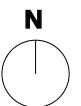
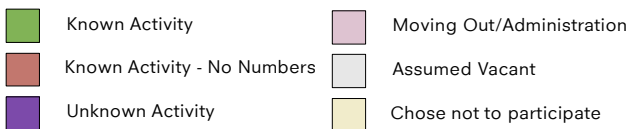
Extrapolated estimate approx 698 jobs
 (across inhabited total floor area)

Extrapolated estimate approx: 927 jobs
 (based on average number of jobs per business in 5 Blackhorse Lane - see right)

The only employment figures we do not know in SIL3 SEA4 are those in parts of 5 Blackhorse Lane (5BHL), a large office building. Extrapolation of number of jobs in this area could be based on different calculation, tested by number of jobs per business and verified by a likely floor area ratio of around 12m²/job.

Total assumed businesses at 5 BHL:	35
Known Business with Job Numbers:	12
Known Businesses / unknown figures:	15
Unknown Business type, Unknown figures:	8
Total Jobs (Given&Estimated):	136
Extrapolated additional Jobs at 5 BHL (From 35 Businesses)	260

Total area of 5 BHL	4903.48 m ²
Job density	12.3m ² /job



SIL 3 SEA4 Station Hub is located directly north of Forest Road and to the west of Blackhorse Lane, bordering the reservoirs of the Lea Valley. Large-scale buildings occupy this site with a variation of modern metal sheds and other brick buildings. This was one of the most accessible areas with most businesses happy to discuss their current situation. 5 Blackhorse Lane, a multi-storey business centre with a prominent corner building, was the only building we had difficulty accessing.

Located near the High Maynard reservoir, the four largest units in this area are set back behind a car park off Forest Road, in the centre of the site. These are home to Noble Foods (GÜ desserts manufacturers) and Baker Ross & Yellow Moon educational toy suppliers. Between these two businesses there are over 250 people employed making up more than third of all jobs in this area, of which more than 70% are local to Waltham Forest.

Another interesting business here is the Mandora Group Ltd. that manufactures mannequins for the fashion industry. The third largest employer, this business has been in the area for over 30 years and is still very fond of the Walthamstow. Other larger or notable businesses in this area include: Hoffman Thornwood manufacturer of plywood sheet and, Cowling and Wilcox art suppliers, CBS Outdoor advertising solutions. All of the businesses described appear to be well-established and relatively successful businesses, some of which are unusual or unique.

The area looks on paper like one of the most successful areas with almost no vacancy and a relatively high number of local employees at 49%.

There was also a fairly high level of 'no answer but we know the type of business' (11), but these businesses related specifically to 5 Blackhorse Lane business centre, where it was difficult to gain access to all businesses on all floors because of security and other issues. We tried to reach some of them by phone or email but it was not always possible to find them online.

Only 3 design/ creative "businesses" show up in the survey, because, for example "Inky Cuttlefish" counts as a single 'business', but we know that individual spaces within 5 Blackhorse Lane cater for larger numbers of different individuals and groups, who sublet space, so this number is not representative of the creative usage.

Businesses in this area spoke to us on the basis of confidentiality. As anticipated, none of them want to move but all are aware of the long term ambitions of the borough and developers for the delivery of housing on this site. The director of one large company told us that he wanted to stay in the area but was not aware of any available sites, and would need a large amount of capital to cover the cost of moving his businesses. It appears from conversations that there is not a coherent idea of what the future holds for the existing businesses on this site. This may be a misrepresentation, but it was the impression given to the surveyors.

UNITS

Industry	No. Units
F&D Wholesale / Retail	0
Clothes/Textile Wholesale / Retail	0
Other. Wholesale/distributor/ Retail	6
F&D Manufacturer	2
Clothes/Textiles Manufacture	0
Other Manufacturer	2
Artisanal Manufacturer Make To order/Specific Skilled Maker	0
Service Providers / Security	11
Printers	2
Educational / Medical / Religious	6
Design / Creative	6
Construction/supply/Maintenance	0
Rental	0
Automobile / Mechanic.	4
Café	0
Storage / Collection	0
Newspaper TV / Radio / Music	0
Social Work / Charity	3
Total	42
No. of units known to be vacant	2
No. of units moving out / administration	0
No. of units with unknown data & unkon activity	19
Assumed Total no. of Units	63

BUSINESS

Type Of Business	
F&D Wholesale / Retail	0
Clothes/Textile Wholesale / Retail	0
Other. Wholesale/distributor/ Retail	4
F&D Manufacturer	1
Clothes/Textiles Manufacture	0
Other Manufacturer	1
Artisanal Manufacturer Make To order/Specific Skilled Maker	0
Service Providers / Security	11
Printers	2
Educational / Medical / Religious	6
Design / Creative	3
Construction/supply/Maintenance	0
Rental	0
Automobile / Mechanic / Repair shop	3
Café	0
Storage / Collection	0
Newspaper TV / Radio / Music	0
Social Work / Charity	3
Other Use (WC/Corridor/Access/Reception)	0
Total No. of known / documented businesses (from 42 units)	34
Businesses who shared staff numbers	21
Businesses where we estimated staff no.	2
Known active businesses but no data	11
Average no. of Units / Business	1.2

JOBS

Total Known Jobs	619
Total Estimated Jobs	22
Total Estimated Offsite Job	26
Total Potential Jobs (from 23 businesses)	667
Average no. of jobs / business (23 businesses)	29.0
Employees from Waltham Forest (from 13 businesses)	264
% employees from Waltham Forest (from 13 businesses)	49%

LEFT: chart showing statistics for Station Hub SIL 3 SEA4

7.2.3 BLACKHORSE LANE SIL3

SIL3 Total Area: 71,942m²
 Assumed inhabited floor area; 56,073m²
 Local workers percentage 23%

Businesses counted: 31
 Jobs given or counted: 585 jobs
 (from 23 businesses - 36,909m²)
 Average m²/job: 63 m²/job

Extrapolated estimate approx 890 jobs
 (across inhabited floor area)



SIL 3 is a large area of industrial land bordering the Lea Valley. It is comprised of several estates: the Forest Trading Estate, Hookers Lane Industrial Units, the Lockwood Way Trading Estate & the Uplands Business Park. This area is approximately 800m north to south and is sandwiched between High Maynard reservoir and Blackhorse Lane, with residential neighbourhoods bordering the area to the east of Blackhorse Lane.

It is the largest site surveyed in the north of Waltham Forest and has some of the largest-scaled units and businesses. The area is in a reasonable condition, with large brick and corrugated metal sheds and a lot of parking provisions. Many of the sites are well maintained, with clean streets and often a lot of activity on the ground.

The area appears to have a very low level of vacancies with only one confirmed vacancy out of 86 units, although 20 units were unknown. Some of those could be vacant.

Manufacture and wholesale retail dominate in this area each representing about 30% of the businesses.

Notable employers in this area include Warren Evans Designer Ideas Ltd, makers of beds and mattresses for retail in the UK, a company with a sustainable ethic, who have a positive outlook on the area and seek to employ local labour, employing around 200 people.

C+S builders is also located here, a family-owned business and NE London's largest independent builders merchant, they have grown to 3 branches in recent years.

NSL parking services in this area employ around 100 people.

In general, businesses in this area tend to be larger than in others, at 25 jobs/business in comparison with the average of 14.

Waltham Forest Council, a large employer in the area, is moving out of its premises in this area, they have not been counted within the job statistics in this survey.

The recent relaxation of Planning laws to allow for conversion of offices into housing, may have an impact on this area, depending on the Use Class of buildings here. This is because some of the buildings in this bit of SIL (for example those formerly housing parts of Waltham Forest Council) may be classed as office buildings.

UNITS

Industry	no. Units
F&D Wholesale / Retail	6
Clothes/Textile Wholesale / Retail	2
Other. Wholesale/distributor/ Retail	6
F&D Manufacturer	1
Clothes/Textiles Manufacture	7
Other Manufacturer	19
Artisanal Manufacturer Make To order/Specific Skilled Maker	0
Service Providers / Security	4
Printers	2
Educational / Medical / Religious	9
Design / Creative	1
Construction/supply/Maintenance	0
Rental	1
Automobile / Mechanic.	1
Café	1
Storage / Collection	2
Newspaper TV / Radio / Music	0
Social Work / Charity	1
Total	63
No. of units known to be vacant	1
No. of units moving out / administration	2
No. of units with unknown data & unknown activity	20
Assumed Total no. of Units	86

BUSINESS

Type Of Business	
F&D Wholesale / Retail	2
Clothes/Textile Wholesale / Retail	2
Other. Wholesale/distributor/ Retail	5
F&D Manufacturer	1
Clothes/Textiles Manufacture	2
Other Manufacturer	6
Artisanal Manufacturer Make To order/Specific Skilled Maker	0
Service Providers / Security	3
Printers	2
Educational / Medical / Religious	2
Design / Creative	0
Construction/supply/Maintenance	0
Rental	1
Automobile / Mechanic / Repair shop	1
Café	2
Storage / Collection	1
Newspaper TV / Radio / Music	0
Social Work / Charity	1
Other Use (WC/Corridor/Access/Reception)	0
Total No. of known / documented businesses (from 63 units)	31

Businesses who shared staff numbers	19
Businesses where we estimated staff no.	4
Known active businesses but no data	8
Average no. of Units / Business	2.0

JOBS

Total Known Jobs	540
Total Estimated Jobs	30
Total Estimated Offsite Job	15
Total Jobs counted (from 23 businesses)	585
Average no. of jobs / business	25.4
Employees from Waltham Forest (from 12 businesses)	97
% employees from Waltham Forest (from 12 businesses)	23%

LEFT: chart showing statistics for Blackhorse Lane SIL 3

7.2.4 ARGALL BUSINESS AREA SIL4

SIL4 Total Area: 124,010 m²
 Assumed inhabited floor area: 83,494 m²
 Based on average: 45 m²/job
 Local workers percentage: 63%

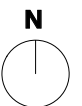
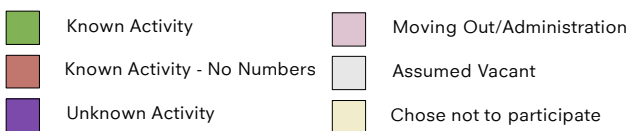
Businesses counted: 175
 Jobs given or counted: 1524 jobs
 (from 132 businesses - 68,959m²)

Average m²/job: 45m²/ job

Extrapolated estimate approx 1855 jobs
 (across inhabited total floor area)



0 100 M



The largest of the sites in Waltham Forest, SIL4, is also the most diverse; it employs over 35% of the total jobs surveyed.

Located in Leyton it is known as the Argall Business Area. It is the most isolated or detached estate from any residential or built up area, surrounded by the Lee Valley Park, St. James Park and the Lammas Meadow. In this respect it is quite hidden and unexpected.

It is home to large businesses such as Bates of London and Allied Bakeries as well as artisanal manufacturers and other types of businesses. With this comes a huge variation in the scale of the units available, from fine grain units with multiple activities to big areas of large units occupied by the same business. It is also one of the areas where we found the most examples of shared workspaces, where several artisanal furniture makers would rent one workshop to split the rent and share machinery.

In this area, 172 different businesses were counted, and probable many more we were unable to identify. The area is dominated by Wholesale/ Retail (56 businesses/33%) and Manufacture (31 businesses/18%). In particular there is a lot of Food and Drink Wholesale/Retail (35 businesses/ 20%).

There is also a relatively large number of Artisanal manufacture (7).

There is a spread of quite large companies (30-50) and much smaller ones (under 10).

The largest employer in the area is Bates of London launderers, a family business that does a lot of London's hotel laundry, that has been operating in East London since 1886, and employs 245 staff.

Also based here are Aytex foods wholesalers who employ 60 people, Decra toilet cubicle manufacturers (70 jobs) who have been there 60 yrs, Northcroft high-end furniture manufacturers (25 skilled jobs), De La Creme manufacturer of womens clothing and (50 jobs) Momart transport and shipping company (50 jobs).

Metallico Construction Ltd are a large steel and metal works for architecture and construction industry, employing 20 skilled workers.

Skilled work includes a dental laboratory, Skill Max, making orthodontics and crowns. DM Watkins Manufacture stretched canvases for paintings. Lie Down I think I Love You are a handbag manufacturer, and there are a couple of stage/ film set builders, and various metal workers.

UNITS

Industry	No. Units
F&D Wholesale / Retail	57
Clothes/Textile Wholesale / Retail	3
Other. Wholesale/distributor/ Retail	39
F&D Manufacturer	6
Clothes/Textiles Manufacture	10
Other Manufacturer	22
Artisanal Manufacturer Make To order/Specific Skilled Maker	7
Service Providers / Security	11
Printers	4
Educational / Medical / Religious	7
Design / Creative	1
Construction/supply/Maintenance	13
Rental	2
Automobile / Mechanic.	20
Café	5
Storage / Collection	27
Newspaper TV / Radio / Music	4
Social Work / Charity	5
Total	244
No. of units known to be vacant	10
No. of units moving out / administration	3
No. of units with unknown data & unknown activity	116
No. of units from survey that do not exist (Re-Built/ WC/corridor etc)	18
Assumed Total no. of Units	391

BUSINESS

Type Of Business	
F&D Wholesale / Retail	35
Clothes/Textile Wholesale / Retail	3
Other. Wholesale/distributor/ Retail	18
F&D Manufacturer	4
Clothes/Textiles Manufacture	9
Other Manufacturer	18
Artisanal Manufacturer Make To order/Specific Skilled Maker	7
Service Providers / Security	6
Printers	3
Educational / Medical / Religious	7
Design / Creative	1
Construction/supply/Maintenance	6
Rental	2
Automobile / Mechanic / Repair shop	17
Café	3
Storage / Collection	24
Newspaper TV / Radio / Music	4
Social Work / Charity	5
Total No. of Businesses (from 246 units)	172
Businesses who shared staff numbers	93
Businesses where we estimated staff no.	39
Known active businesses but no data	35
Average no. of Units / Business	1.4

JOBS

Total Known Jobs	1072
Total Estimated Jobs	242
Total Estimated Offsite Job	210
Total Potential Jobs (from 132 businesses)	1524
Average no. of jobs / business	11.5
Employees from Waltham Forest (from 52 businesses)	484
% employees from Waltham Forest (from 52 businesses)	63%

LEFT: chart showing statistics for
Argall Business Area SIL 4

7.2.5 SIL5,6+7 and BEA 5, 6, 7, +8

SIL5,6&7 Total Area: 49,729m²
 Assumed inhabited floor area: 46,104m²
 Local workers percentage 43%

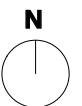
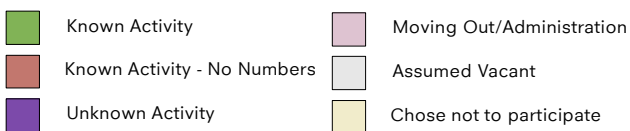
Businesses counted: 40
 Jobs given or counted: 407 jobs
 (from 38 businesses - 23,028m²)

Average m²/job: 56 m²/job

Extrapolated estimate approx 823 jobs
 (across inhabited total floor area)



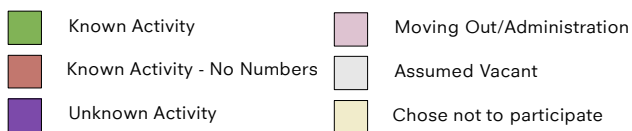
0 100 M



BEA5&6 Total Area: 30,508 m²
 Assumed inhabited floor area: 25,037 m²
 Local workers percentage: 43%

Businesses counted: 37
 Jobs given or counted: 478 jobs
 (from 30 businesses - 23,028m²)
 Average m²/job: 48 m²/job

Extrapolated estimate approx 522 jobs
 (across inhabited total floor area)



BEA7&8 Total Area: 17,712 m²
 Assumed inhabited floor area: 17,241 m²







Local workers percentage 43%

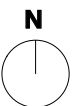
Businesses counted: 13
 Jobs given or counted: 145 jobs
 (from 30 businesses - 14,862m²)
 Based on average: 102 m²/job

Extrapolated estimate approx 169 jobs
 (across inhabited total floor area)



0 100 M

- | | | | |
|--|-----------------------------|---|---------------------------|
|  | Known Activity |  | Moving Out/Administration |
|  | Known Activity - No Numbers |  | Assumed Vacant |
|  | Unknown Activity |  | Chose not to participate |



SIL 5+6+7 BEA 5, 6, 7 +8 have been grouped together.

SIL 5, 6 + 7 sit along and across each other next to train tracks, Lee Bridge Road and Orient Way.

SIL 7 includes some of the most recent industrial building in the area, many having been built to rehouse businesses from the Olympic park construction. The colorful metal sheds stand boldly in the landscape and are the most visible warehouses in Waltham Forest.

SIL 5 +6 are far more conventional estates, made up of standard brick buildings that house a many different businesses. Union Veneers employ 25 people, and have been in the area for over 60 years manufacturing timber veneers and applying it to all sorts of furniture. Another business, Craig Plant deal in a very specific industry of reconditioning asphalt pavers for their re-sale in the UK and internationally. Percy Ingle Bakers employs 92 people and has 80 years in place. SIL 5/ 6 and 7 is a fairly substantial employment area.

BEA 5, 6, 7 +8 are small areas but still account for nearly 700 jobs. All are varied in their relationship to the city around them. BEA8 is quite exploded, next to St James Park, with a large area for the parking of Waltham Forest Community Transport vehicles. BEA7 is accessed directly off the main road leading to Leyton, and is a series of terraced warehouse spaces ranging in size from 2300sqm to 60sqm units. B+Q is located in the larger of the units.

BEA 5+6 have been grouped together due their proximity to one another. They are located the furthest south, and seem to have a combination of all characteristics

noted during the research conducted in the industrial estates.

They have an enclosed 'gated' estate part, in one area they are open the marsh lands to their west, and in other places they are directly adjacent to residential buildings surrounding them. There is a good variation of business, some who have been operating in East London for over 80 years (Percy Ingle Bakers) and other are only just setting up and are still in their infancy years.

One dominant business in BEA 5+6 is GBN Services that has two very different businesses ventures. On one side the self-storage facilities and on the other the waste management plant, employing over 50 people it is one of the largest employers in these DEA.

Other medium-sized companies in these areas are
Hackney School transport (40 jobs)
Northfileds Linen hire (50 jobs) B+Q (45 jobs) Vitesse mailing services (40 jobs).

SIL 5,6+7 and BEA 5+6 have fairly average job densities for this type of development, whereas BEA 7+8 appear to have a low density of jobs.

Some of the smaller employment areas appear potentially vulnerable because of the perceived appetite for landowners to undertake mixed-use developments in employment areas, which may also be perceived as being less contentious because they may not alone carry a critical mass of employment.

UNITS

Industry	No. Units
F&D Wholesale / Retail	17
Clothes/Textile Wholesale / Retail	1
Other. Wholesale/distributor/ Retail	26
F&D Manufacturer	12
Clothes/Textiles Manufacture	0
Other Manufacturer	16
Artisanal Manufacturer Make To order/Specific Skilled Maker	4
Service Providers / Security	6
Printers	4
Educational / Medical / Religious	4
Design / Creative	2
Construction/supply/Maintenance	11
Rental	1
Automobile / Mechanic.	9
Café	1
Storage / Collection	1
Newspaper TV / Radio / Music	0
Social Work / Charity	7
Total	122
No. of units known to be vacant	10
No. of units moving out / administration	0
No. of units with unknown data & unknown activity	57
No. of units from survey that do not exist (Re-Built/ WC/corridor etc)	1
Assumed Total no. of Units	190

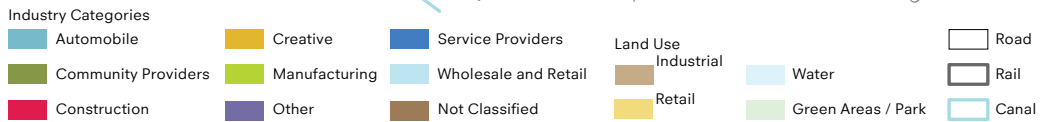
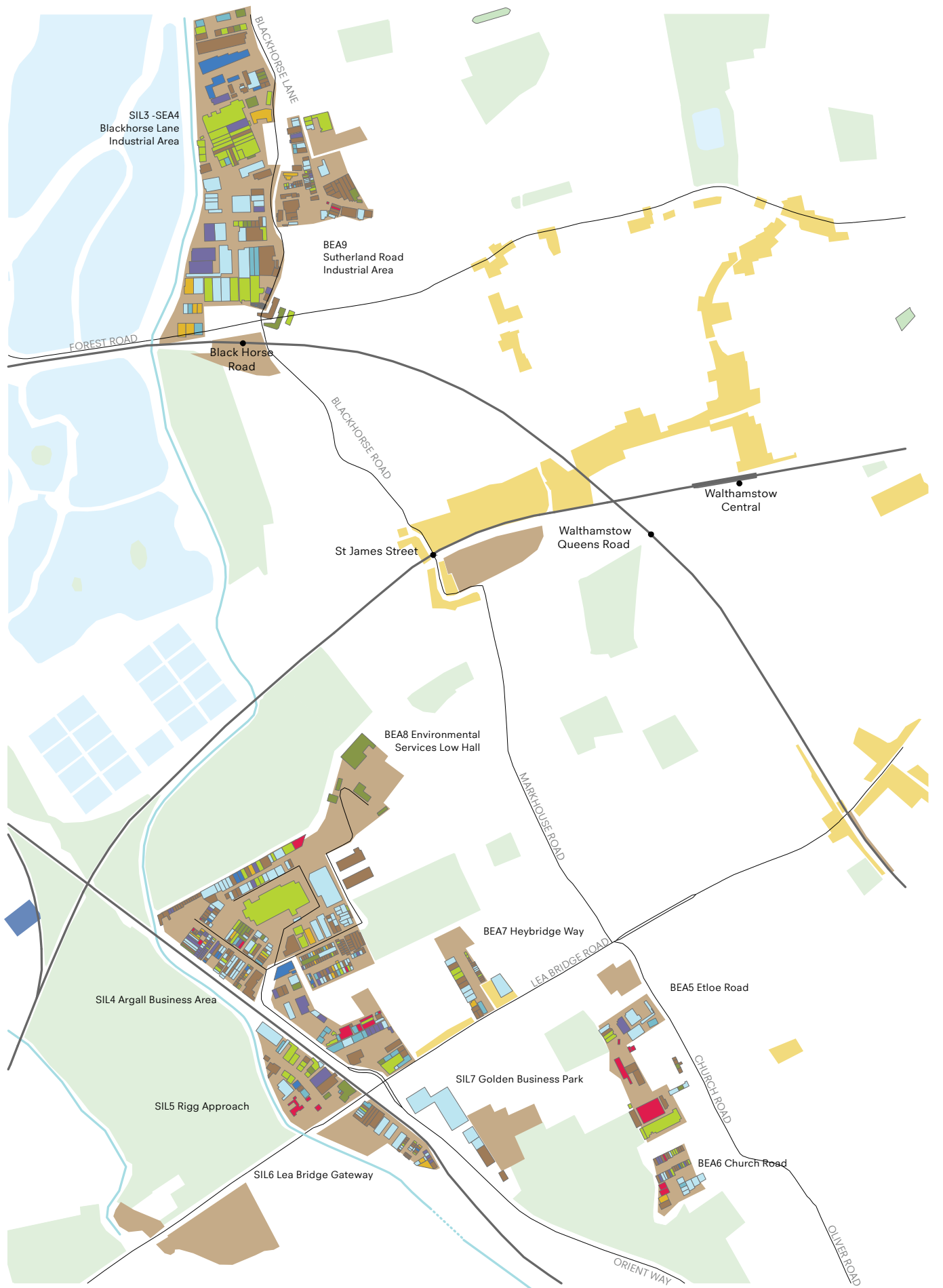
BUSINESSES

F&D Wholesale / Retail	15
Clothes/Textile Wholesale / Retail	1
Other. Wholesale/distributor/ Retail	16
F&D Manufacturer	7
Clothes/Textiles Manufacture	0
Other Manufacturer	11
Artisanal Manufacturer Make To order/Specific Skilled Maker	4
Service Providers / Security	6
Printers	3
Educational / Medical / Religious	4
Design / Creative	2
Construction/supply/Maintenance	5
Rental	1
Automobile / Mechanic / Repair shop	9
Café	1
Storage / Collection	1
Newspaper TV / Radio / Music	0
Social Work / Charity	3
Total No. of Businesses (from 117 units)	89
Businesses who shared staff numbers	66
Businesses where we estimated staff no.	8
Businesses surveyed where we don't know staff numbers	16
Average no. of Units / Business	1.37

JOBS

Total Known Jobs	923
Total Estimated Jobs	83
Total Estimated Offsite Job	10
Total Other Tenants	14
Total Potential Jobs (from 89 businesses)	1030
Average no. of jobs / business	13.9
Employees from Waltham Forest (from 30 businesses)	171
% employees from Waltham Forest (from 30 businesses)	43%

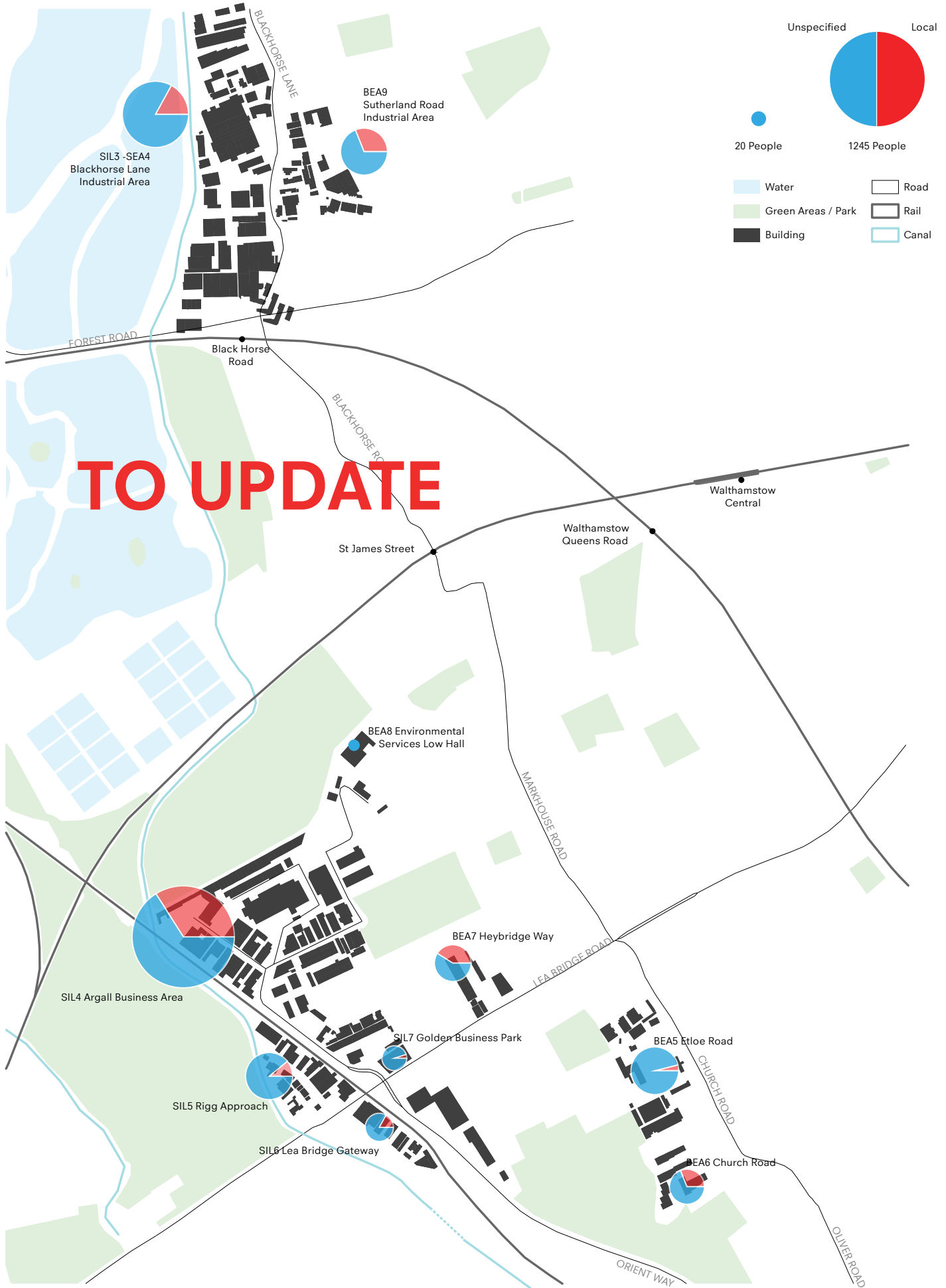
LEFT: chart showing statistics for
SIL 5, 6 +7
BEA 5,6,7+8



0km 1km

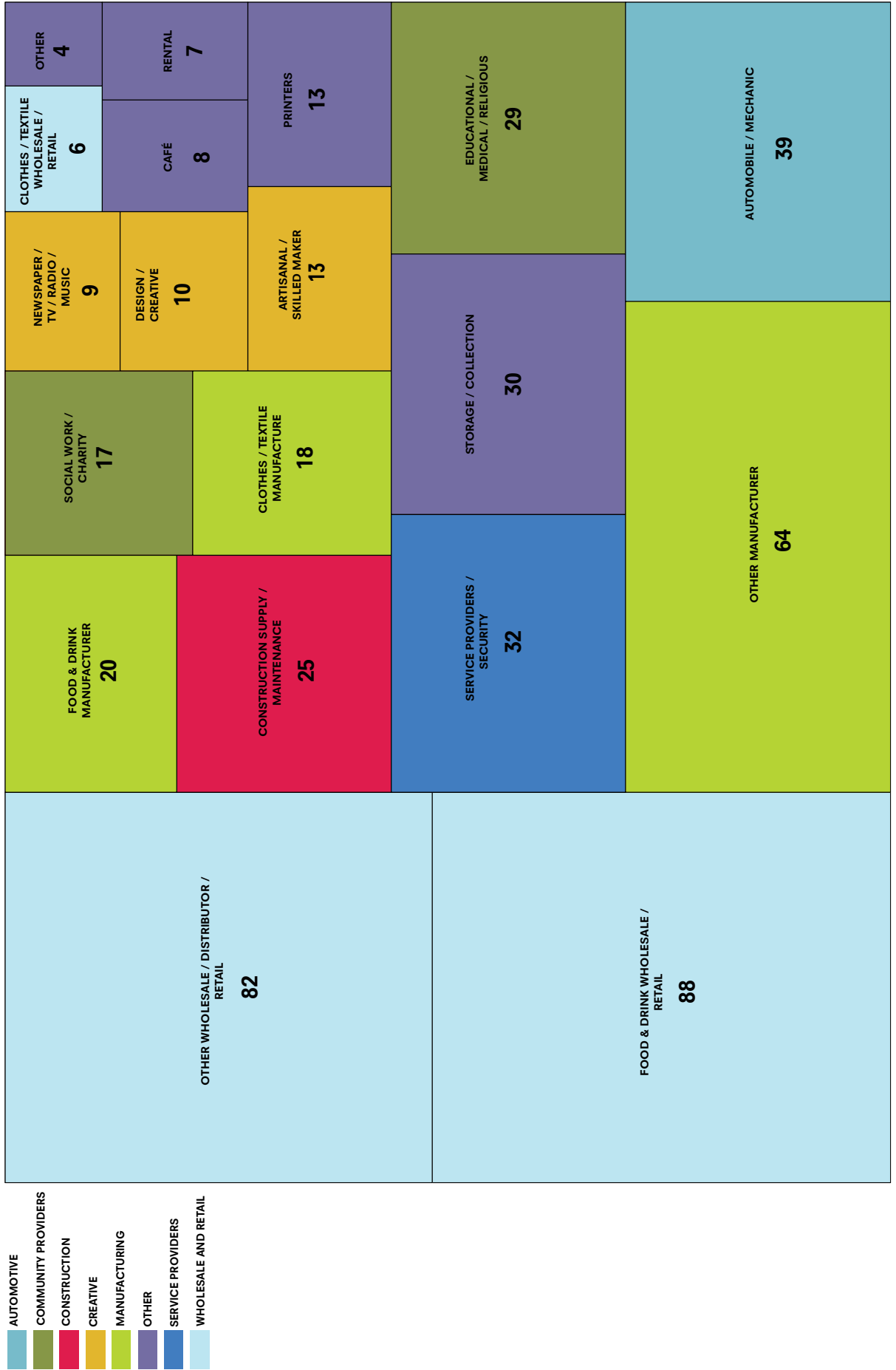
Base Map: OpenStreetMap and Contributors CC-by-SA

ABOVE: Map showing different business types in the surveyed areas



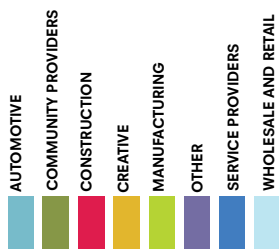
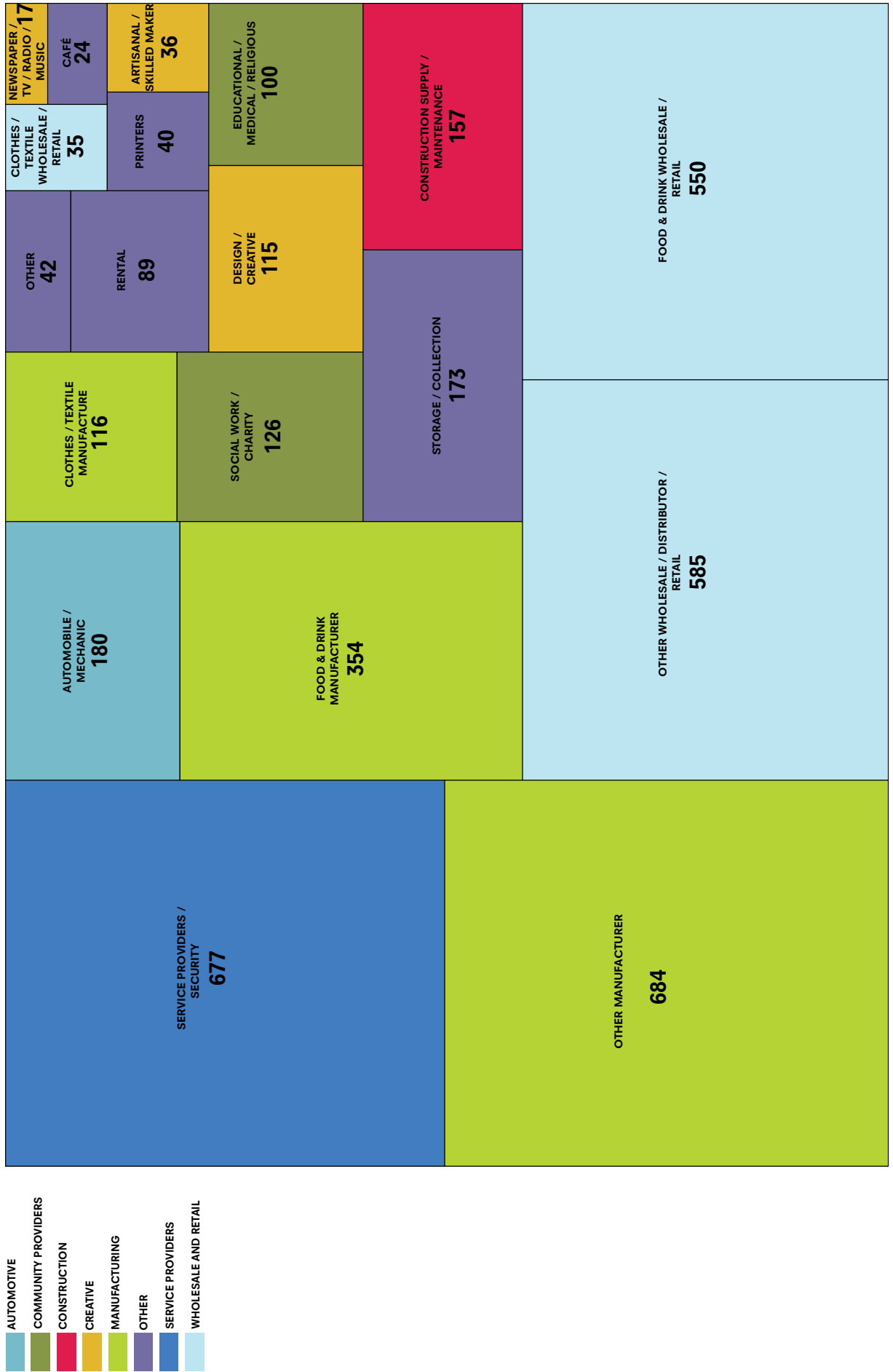
ABOVE: Map showing proportion of employees local to Waltham Forest from the different surveyed areas

NUMBER OF BUSINESSES BY INDUSTRY TYPE: WALTHAMSTOW



- AUTOMOTIVE
- COMMUNITY PROVIDERS
- CONSTRUCTION
- CREATIVE
- MANUFACTURING
- OTHER
- SERVICE PROVIDERS
- WHOLESALE AND RETAIL

NUMBER OF EMPLOYEES BY INDUSTRY TYPE: WALTHAMSTOW



8 NARRATIVE OUTCOMES



Northfields, Argall Way

Set up in 1952 as a manufacturer and supplier of linens for local caterers and restaurants Northfields has grown to become the largest linen hirer of bespoke linen to the event industry. It began in a basement in Northfields Road in Stoke Newington, North London. The company now has this 39,000sqf warehousing in Leytonstone, East London.

In 2004 Northfields invested in its own 50,000sqf premises in the Far East - this has given the company total quality control. It manufactures its own yarn, and follows the whole process from start to finish. This hands-on approach has led to advancements in colour continuity and ensures that high standards are met. Northfields also has its own attached commercial laundry that processes all its own work, and launders customers own laundry.



Presetech Film Laboratories Blackhorse Lane

Presetech as a good relationship with the Council, mentioning that the staff seem far friendlier than Islington - they were previously based in Highbury. Also mentioned enjoying the area to work in, and has a good relationship with neighbours. Their business aims to restore British film heritage that has been lost or forgotten over time. They restore not only the physical video, but the also research and piece together what they can of the intellectual story of the films. Due to cuts in Cultural funding, times have been more difficult but they are doing well.



Howdens Joinery Co., Etloe Rd, Orient Industrial Park

Howdens deal in wholesale kitchen furniture. They have an in house design team. Howdens Business Moto is “Local business for Local Clients” they employ local people as much as they can in all of their 500 stores across the UK. The business started in east London - They always try and use other local businesses when possible (he gave the example of using flowers from local flower stores for birthdays). They like the location because it is close to the London market & the available space suits them.

Sell 15-20 kitchens a week



Protech Embroidery Ltd, Argall Ave.

Protech is a knitting company that embroiders logos and emblems onto jumpers & t-shirts. In terms of their space in Waltham Forest, was the right place for them at the time, with good access, and close to where they live. The competition in Asia is tough and business has been struggling. The main thing that helps them is that their clients like to visit the space they work in, and are able to look at samples quickly. This is impossible for companies that work from Asia and import.

The majority of their goods are for local distribution within London





**Northcroft Contemporary Furniture Makers,
Argall Ave**

The business owner was very interested in this work. Business is good, and the owner wishes to expand if the opportunity arises of finding a space close to existing workshops.

He discussed what he sees as a difficulty of getting skilled labour in the UK, due to a lack of respect for trades involving making things. He spoke at length about the problems with a throw-away consumer society which inevitably requires cheap goods imported from places like China, which in turn forced UK manufacture into top end/expensive produce manufacturing.

Their main difficulty is not with getting work, but getting the skilled labour he trusts enough to get on with the job. Mentioned trying to interact with local universities, but it failed as he said there was not the will to mix student furniture makers with the working industry.





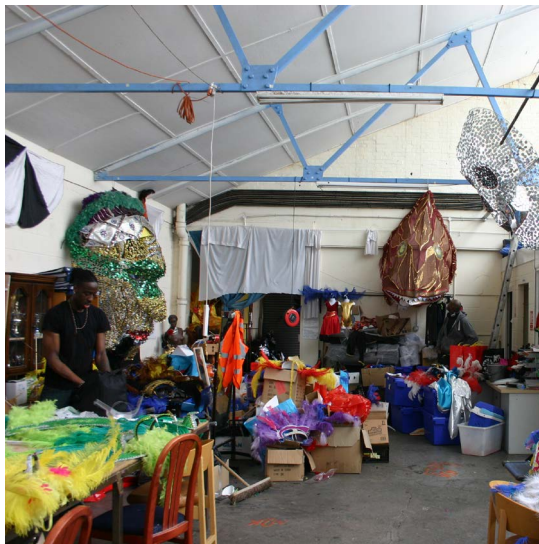
M2K Ltd, Argall Avenue

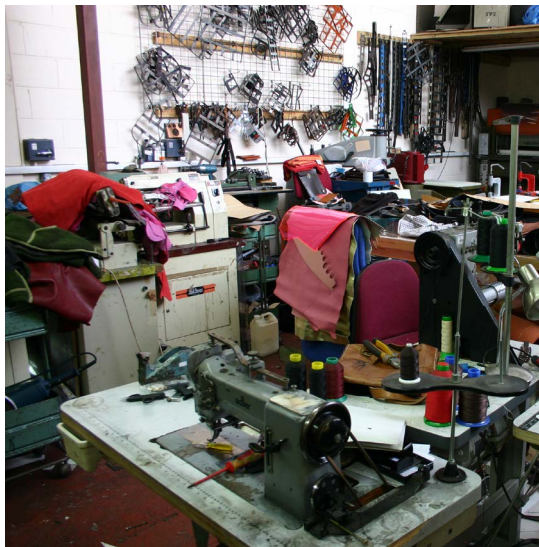
Masquerade 2000, otherwise known as M2K manufacture costumes for London Nothing hill Carnival - more than 100 volunteers work for them. They moved to current site because they needed a bigger location and space.

The group started in 1992 as a voluntary community based organisation linked to carnival in the U.K and Europe. The band was founded by Lincoln Rahamut. Lincoln and his co designer David Brown say that Masquerade 2000 the benchmark for all UK carnival groups.

David Brown is now the Lead Designer of M2K. The design team come from various design-based backgrounds including: Carnival Arts, Fine Arts, Architecture, and Graphic design, Costume Making & Textiles.

M2K began as a voluntary organisation and now has charitable status. The organisation was formed and developed within the public sector guidelines. There is a board of directors and a management committee that runs the organisation. Also from the inception, Masquerade 2000 formed a youth committee in which the young people support and assist the management in delivering a service.





Cactus Leather, London. Argall Avenue

The owner, Steve, has been working in the leather manufacturing industry for over 40 years; he currently is 67 and technically retired. He started his working career making “knives” to cut out shapes from leather for the shoe industry. He has now been working with various individual clients making leather or plastic cut outs for handbags, for belt manufacturers, and for various bondage and S&M designers in East London. He loves to work and has found the change in peoples’ attitudes interesting. When he first started making leather cut outs, he started making phone covers for Motorola in the 70’s. At one point, he received a phone call from a manufacturer in Taiwan informing him that they were going to start selling in the UK. He was advised by them that he would never be able to compete. When the time arrived they offered goods at a quarter of his asking price, and effectively killed off that business for him. He accepts the fact that people and businesses need to evolve and adapt, which is what he did and is still going today. He currently has constant work, saying that he is one of only three independent industrial cutters in London. He could take on more work, but with the lack of skilled workers he turns things down. He has tried to get an apprentice in order to hand over all his machines and knowledge, but says young people have no interest in making things anymore.

He also mentioned that the increased Insurance and Health and Safety laws have made it impossible for him to justify training new staff. Business is very good but Steve fears that when he retires the machines he has been using for so many years will go to waste. He wishes he could hand over his machines to young makers. He imports plastics from China as they are cheaper, and they offer better range of colours. All his products are for London designers and manufacturers. Manufacture cuttings for various fashion and other trades and has been in his current location for 3 years.

Can make More than 500 belts a day

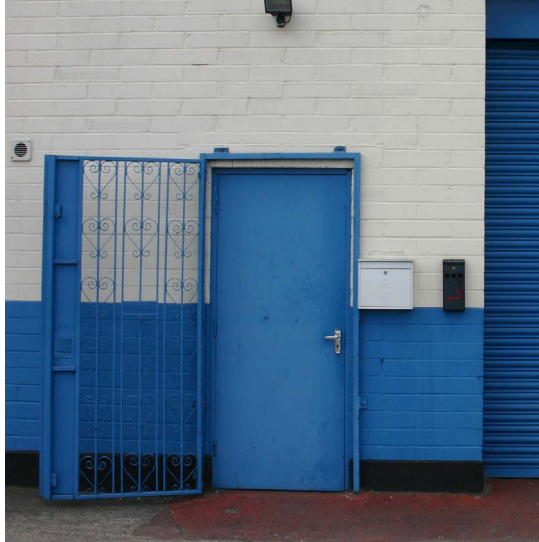


Bates of London, Argall Ave

Bates is a family run business that has been operating in East London from 1886. It was first created by Mrs Bates who after years of working for a laundrette decided to open her own business, it has since developed and become one of east London's largest commercial laundry providers. The business has been handed down from parent to child for 3 generations, and is currently run by David Bahleline. The company pride themselves in providing a family atmosphere environment for their employees, and has retained staff for long periods of times, some even for life. The washing is collected and delivered back to where it came from in 24hrs using their own delivery service. / London Hotels, Sports Centre and Health Clubs//Business is good but not the best it's been, they depend heavily on trade from Hotels, which has recently seen a dip in customers. / Launderers since 1888, and business is still growing

Bates processes >100,000 items a day.





Lie Down I Think I Love You, Argall Ave

LDITILY makes handbags and accessories, and provide for stores in London - but they export the majority of their products to Japan. Their Leather comes from Italy and other items are made in EU. They used to be located in another warehouse very close by, and the unit they are currently in was made available when they needed it. Would like to grow, but happy for now. The duo behind the label is designer Emily, who has the ideas and creative input and her business partner Lisa, who makes sure these ideas can be realised. Emily having completed an MA at Central St. Martins launched the 'made in London' accessories brand with Lisa in 2006. Today it has grown into a global brand, selling worldwide. Their new independent shop in Amwell Rd, Islington, was opened at the beginning of April 2009. - This shop showcases the label's exclusive 'boutique' collection and its younger sister, 'sweetheart' as well as selection of other 'made in London' accessories and vintage finds. 'Lie down I think I love you' was established as a backlash to the ubiquitous, mass-produced, designer rip-off. The company ethos was to design and produce a 'Made in London' brand using quality leathers, traditional craftsmanship and re-working vintage fabrics and objects. Design ideals include English eccentrics, nostalgia and romance, which have captured a loyal fan base coming from distances such as Japan just to visit the boutique. Business for them is steady.

Make 250 bags a week



"Local business for Local Clients"

We employ local people as much as we can in all of our stores across the UK - Whenever possible we use other local businesses, for example we always use the local flower shop to buy staff flowers on their birthdays.

Howdens Joinery Co, Manager



CONCLUSIONS

.....

9 CONCLUSIONS

9.1 Assets

The Borough has some excellent transport connections, and is close to good housing stock: there are many good reasons for businesses to locate in Waltham Forest, and these should be promoted. It could potentially be seen the new East London business location, much in the same way that the residential demographic is changing and creeping north and eastwards from Hackney and Haringey. This was a view supported by the workspace companies that we spoke to.

9.2 Representation

One of the main conclusions is that it is very difficult to understand, or even to summarise, the vast range of different activity that happens inside buildings on the industrial estates. This is partly because the estates themselves, as well as the individual buildings do not represent what happens inside them. There are pragmatic reasons for some buildings not to advertise their contents, for safety and security, for example. But in general it could help support and promote businesses if there was more manifestation of their presence both on site and off-site. It would be an interesting and challenging ambition to find a way to celebrate businesses in the industrial areas in the same way that local high street businesses are starting to be recognised.

9.3 Significance to local job market

The surveyed areas support high numbers of jobs and large numbers of local people. The counted jobs were 4104 and an extrapolated estimate took us to up to 5500 jobs. If the average percentage from those who responded to that question is applied across the area, then 48%, or up to 2640 local people are employed in these areas. It would be helpful to be able to compare these figures with the overall numbers of jobs in Waltham Forest as a whole, and the figures for the working-age population.

Whilst it is important to note that on average nearly half of the people working in these industrial areas are local people, it is also significant to consider the inverse,

that over half of jobs were taken by people from elsewhere across London. Therefore there is a significant relationship between the borough's employment areas and employment in London as a whole, and the borough is attracting a lot of workers and business-owners from outside the borough.

9.4 Changing industry and adaptability of premises

Industry has changed in London in the last 50 years. There are many more smaller businesses than there were when these areas were initially developed as industrial areas. Previously they were dominated by fewer, larger companies. Now they are occupied generally by a much larger number of smaller companies.

Consequently, there is much subdivision of premises. In this regard, premises appear to be very adaptable to different kinds of businesses. A company designing and making architectural metalwork could easily occupy the same type of premises as a waste recycling company or a handbag manufacturer.

9.5 Significance to local identity

The industrial land use has a significant historical heritage in the Upper Lea Valley, which should be celebrated.

There are many significant businesses in the area that could be promoted as, "Made in Waltham Forest", such as Dunhill Pipes, sets for International theatre and opera productions, as well as innovative waste recycling.

On a more general level, many of the business-owners that we spoke to understood themselves to be part of the industrial and business heritage of the area.

There are also buildings and building types that are part of the area's industrial heritage.

9.6 Success stories

Production numbers show a large

economic output from the area. There are also companies that have been there for a long time, starting from humble origins, such as Percy Ingle bakers. There are also companies, such as Warren Evans bedmakers (and others) that demonstrated a real sense of connection to their local area. A sense of local pride is invaluable, and although it is present in some of the more innovative companies there are areas where it is lacking.

9.7 Networks

It was felt, when talking to business-owners that there was often little knowledge of what other businesses were operating nearby. This was particularly mentioned by smaller businesses, and some of them (such as Louis Moreau quilters) actively stated that they would like to use more local suppliers and services. However even where businesses did not specifically mention their willingness to use local suppliers, this appears to be an areas which could be exploited further.

9.8 Entrepreneurship

There were many 'new' businesses in the areas, having opened in Waltham Forest in the last 5 years. It is important to support these types of employment areas as places for businesses to start. Their flexibility and relatively low rent appears to offer opportunities for entrepreneurs. This would not be the case in a new mixed-use development, for example. However, more work could be done to understand the changing needs of businesses, and what spaces exist if businesses want to expand, for example.

9.9 Building stock

Many premises look very scruffy from the exterior, but have well-cared-for, neat and well-lit interiors. Some of the more high-end businesses had most scruffy exteriors because they have an eye on security.

Providing 'attractive, new' business premises in Waltham Forest might be an obvious ambition for the Borough, but there are also drawbacks to this approach which should be recognised.

New development would likely price out most existing businesses, therefore if seeking to improve buildings and places, on some estates, it would be worth taking the approach of working with landowners and businesses to incrementally improve industrial areas, whilst carefully maintaining local businesses.

Whilst some of the building stock could be described as poor, this is not necessarily a reason for wholesale demolition, because buildings can continue to be upgraded and adapted, or developed incrementally without wholesale displacement of businesses. One could point to the 'slum' demolitions of the 1960s, where some residential housing that escaped slum clearance is now highly prized. Whilst this cannot be applied across the board, it is a valid comparison that there are different attitudes towards regeneration that are equally valid

9.10 Fragility

We spoke to businesses who noted that it did not take much to severely disrupt small businesses - temporary road closures for example.

Many of the businesses interviewed stated that their business was not doing as well as they hoped. This suggests that at the present time many are fragile, although the surveyors suggested that this was a general mood of 'it would be nice to be doing better', rather than necessarily an objective fact indicating failure.

Therefore redevelopment either in employment areas, or even adjacent to employment areas, is likely to cause businesses to fail to some degree. Many businesses would not survive relocation, for example, without much support.

9.11 Development uncertainty

Many businesses spoke of continuous speculation about the future of the sites where their businesses were located. Major mixed-use development in the surrounding area and other 'rumours' undermine the will for businesses to

invest in an area (whether financially or otherwise) or commit to the area, and progressively breaks down confidence.

There was an element of distrust which made it hard to carry out the survey at times, because business-owners felt that the surveyors may be part of a wider drive for redevelopment, and they felt that they were not stable in their current location. This is probably not healthy for the promotion of local business unless a clear strategy for attracting new or different business is in place.

9.12 Relocation

A number of businesses stated that they had moved to their premises because they had been 'pushed out' of other areas by new development, such as in Tottenham Hale. This suggests that some level of relocation is viable, but only if there continue to be more premises available, and if support is offered in finding spaces.

9.13 Revenue

Business rates from these employment areas could be an important source of revenue for the Borough, helping to deliver business services.

9.14 Pressures for development

Blackhorse Lane AAP states the intention to create 1000 new jobs in the wider area as part of the ongoing development.

During our survey Station Hub and Sutherland Road sites supported 965 counted jobs. Because not all businesses responded we estimate that the total number at time of writing, based on floor area ratios is about 1250 jobs. This also takes into account a high level of vacancy in Sutherland Road which has been generated since 2009.

Based on the current AAP and recently-granted planning applications, and those in the pre-app process, it is estimated that buildings containing at least 800 of these jobs could be removed from the area by long term development proposals. It is therefore important to reconcile new job

creation with potential job losses, in order to make sure that a net gain of 1000 new jobs is achievable.

There are obviously pressures for development, especially housing development, in Waltham Forest, and we were keen to understand how it might be possible to deliver mixed use development with residential, with no net loss of business floor space. Two examples of projects initiated by Workspace Group are shown below. As described, it is important to balance new development with its impact on existing businesses. Nevertheless it is possible to enforce affordable rents through development control planning conditions.