

Employment Land Review

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List of Abbreviations

AAP	Area Action Plan
BAU	Business As Usual
BXC	Brent Cross Cricklewood
DPD	Development Plan Document
EiP	Examination in Public
GIS	Geographical Information Systems
GLA	Greater London Authority
GVA	Gross Value Added
IBP	Industrial Business Park
LAD	Local Authority District
LDA	London Development Agency
LDF	Local Development Framework
LSOAs	Lower Super Output Areas.
NLBP	North London Business Park
NLWP	North London waste Plan
NLSA	North London Strategic Alliance
NLSRDF	North London Sub-Regional Development Framework
ODPM	Office of the Deputy Prime Minister/Communities and Local Government
PIL	Preferred Industrial Location
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
PTAL	Public Transport Accessibility Level
SIC	Standard Industrial Classification
SEL	Strategic Employment location
SIL	Strategic Industrial Location
SME	Small and Medium Enterprise
SPG	Supplementary Planning Guidance
SREDIP	Sub-Regional Economic Development Implementation Plan
SRDF	Sub-Regional Development Framework
SRIF	Sub-Regional Implementation Framework
TfL	Transport for London

Executive Summary

The purpose of the study is to provide an important part of the evidence base for the Barnet Local Development Framework (LDF) and inform and support the main Development Plan Documents (DPDs) including the Core Strategy, the Site Allocations and generic Development Management Policies. This study looks at the policy context and the socio-economic conditions of the borough, assesses the current employment land in terms of quality and quantity and estimates the future requirements for employment land. Finally the report provides recommendations on employment sites that should be safeguarded, considered for redevelopment or released for other uses.

Barnet Context

The analysis of employment land in Barnet is set within the context of the range of current/emerging planning and economic policies that are relevant to the retention or potential land use changes to existing employment sites.

At the national level, planning policies including PPS1, PPS3, PPG4 and PPS 6 provide a framework for economic and community development aiming to:

- Deliver the right development in the right place and time and provide for the environment;
- Ensure that everyone has the opportunity to live in a decent, affordable home;
- Assist new firms through the planning system by adopting a positive approach to the location of new business developments;
- Encourage vital and viable town centres;
- Encourage more sustainable forms of development as well as the development of renewable energy sources; and
- Provide guidelines on areas in which particular types of development will be acceptable and those in which special measure will be required to mitigate negative impacts.

At a regional level the London Plan aims to plan for London's spatial development taking into consideration the need for housing, employment land and green space and aiming to promote the objectives of the Economic Development Strategy for sustainable economic development. The London Plan recognises three different opportunity areas across Barnet: Cricklewood/Brent Cross with a proposed employment capacity of 20,000 and 10,000 new homes; Colindale with a proposed

employment capacity of 500 and 10,000 homes and Mill Hill East with a proposed capacity of 500 jobs and 3,500 new homes.

Further to the London Plan, the Industrial Capacity Supplementary Guidance seeks to ensure that sufficient land is available to meet future industrial needs and releasing the surplus for other policy objectives.

Barnet's Unitary Development Plan set the strategic employment policy objectives as:

- To consolidate and promote employment use classes (B1, B2, B8) on the borough's primary industrial sites and business parks and safeguard them against redevelopment for non-business/industrial uses. (GEMP1)
- Retain land that meets strategic requirements for small, medium and large scale industrial users. If there is no realistic prospect of re-use purely for employment purposes, mixed-use development for employment and housing will be a priority. (GEMP4)

In many aspects Barnet appears to be a prosperous borough with a population of close to 330,000 in 2007. The borough performs below the London and national average in terms of economic activity rates and employment rates. However it is worth noting that unemployment rates as measured by claimant counts are below the London average. In addition the majority of people receiving Job Seeker's Allowance appear to be unemployed for less than 6 months indicating that unemployment is not structural but rather cyclical in nature.

Barnet's residents are highly qualified with close to 40% of those of working age being qualified to NVQ4+. These high qualification levels are reflected in the residents' occupational profile, with the vast majority of Barnet's residents working in Managerial and Professional occupations. Subsequently this is also reflected in residents' gross earnings. However, there is a mismatch between residents' qualification levels and the requirements of local employers, indicating that the borough has high levels of out commuting.

Property Market Overview

According to market intelligence, local businesses are not prepared to pay rent which is adequate to finance the build cost of new offices. Office demand in the borough has tended to come almost entirely from companies who are historically located there or service companies such as solicitors, accountants and local authorities.

At present, there are six major office locations in Barnet. Four of these locations are in and around the town and district centres (Edgware, Hendon, Golders Green, Finchley (East Finchley and Finchley Church End) while the remaining two areas are business parks (North London Business Park and Connaught Business Centre - The Hyde).

Barnet has approximately 4.8 million sq ft of office floorspace. Despite its relative proximity to Central London and access to the underground network it has not built a reputation as a prime office location and does not tend to attract significant numbers of large scale occupiers. Take-up in Barnet is dominated by leasing transactions under 2,500 sq ft, including tenants such as small insurance companies, solicitors, building firms and publishers. The dominance of lease transactions for small units under 2,500 sq ft, means that rents are high on a £ per sq ft basis.

Industrial stock in Barnet totals approximately 4.7 million sq ft according to the 2007 Valuation Office rateable floorspace statistics. As with its office stock, Barnet is not a prime industrial location due to its suburban nature and relatively poor road links. Barnet's industrial stock tends to serve local demand for industrial space, rather than attracting any significant numbers of large 'in-coming' occupiers.

Since 2005, the annual take-up of industrial space has been steadily increasing in the borough, with take-up since 2005 totalling 186,000 sq ft. As with the office market in Barnet, take-up is dominated by lease transactions for small space. Following a small drop, between 2005-2006, top rents for industrial floorspace saw a steady climb reaching £22 per sq ft in 2008 almost double that achieved in 2007.

Employment Land Supply

Current employment land supply was assessed through visual site surveys undertaken during December 2008 and January 2009. The survey covered all employment sites in B use as well as all sites in non-B class uses that are part of a wider employment area. The sites were assessed in terms of age, quality and image, accessibility, potential conflicts with adjacent uses and parking provision.

Around 101 ha of land across Barnet, which is currently designated as employment land was surveyed. Of this 15% was found to be office space, 15% industrial units and 14% warehouses. A further 43% was found to be used for non-B class uses such as housing and retail.

The survey showed that Barnet's current employment land performs either good or average for the majority of the indicators. Most of the sites are relatively new, with only 2% found to be built in the pre-war era. Almost half of the employment

sites were rated as average in terms of image and quality, with another third rated good. Close to half of the sites were found to have good accessibility. Parking provision was found to be relatively good with only 12% of sites having poor parking provision. In terms of conflict with adjacent land uses and flexibility the vast majority of sites, more than 70%, were rated as good.

Land Demand

The future employment land requirements were estimated considering three different employment scenarios. Scenario 1 – “Business as Usual” used existing economic and sectoral growth trends which estimate an increase of around 11,000 jobs between 2006 and 2026. Scenario 2 – “Planned Growth” considered the requirements of the London Plan for job growth of 19,000 for the same period. Scenario 3 – “Aspirational Growth” considered the employment growth targets of the London Borough of Barnet of 25,000 jobs to 2026.

Employment forecasts by sector published by Experian Business Strategies were used and later adjusted to reflect the three different scenarios. The broad Experian Business Strategies defined sector forecasts were converted into three-digit SIC level estimates using the Annual Business Inquiry data. Finally, three-digit SIC level estimates were converted into B use class employment projections.

Using the above methodology Scenario 1 forecasts an 8% growth in jobs, the majority of which comes from non-B class uses. Employment in offices grows at around 6% whereas employment in industrial space falls by 26% for 2009-2026. Scenario 2 forecasts a total employment growth of 12%. Office space employment grows by 31% but employment in industrial space and warehouses falls by 8%. Scenario 3 forecasts an employment growth of 17%. Office space and warehouse employment under this scenario grows but employment in industrial space falls.

Using employment land densities and employment plot ratios the forecasts for employment job growth are converted into employment land requirements. Scenario 1 forecasts an additional employment land requirement of 1.5 hectares for 2009-2026. Scenarios 2 and 3 forecast similar additional employment land requirements of 13.4 additional hectares and 13.5 hectares respectively.

Quality of Employment Land

A qualitative assessment of the employment land stock was undertaken considering fitness for purpose, sustainability and marketability of the employment clusters. The appraisal used a traffic light approach to identify estates that are: fit for purpose and should be safeguarded (Green); those clusters where employment uses remain viable but the need for intervention in the future is likely (Amber) and those sites that could be considered for release for alternative uses (Red). Around

36% of employment land was rated as Green, 61% was rated as Amber and only 3% was rated as Red. The assessment of individual employment estates is summarised in the table below.

Table 1: Traffic light assessment by employment estate

Estate name	Traffic light assessment
Bittacy Hill	Green
Colindale Business Centre	Green
Colindale Technology Park	Green
Garrick Industrial Centre	Green
Granard Business Centre	Green
Mill Hill East Industrial Estate	Green
Regents Park Road employment cluster	Green
Squires Lane	Green
Brunswick Business Park	Amber
Bunns Lane Works	Amber
Connaught Business Centre	Amber
Finchley Industrial Estate	Amber
Grenville Place	Amber
Hadley Manor Trading Estate	Amber
Lancaster Road Industrial Estate	Amber
North London Business Park	Amber
Queens Road Industrial Estate	Amber
Redrose Trading Centre	Amber
Oakleigh Road South	Amber
Falkland Road Industrial Estate	Red
Pricklers Hill	Red

Source: Halcrow, Savills

Market Balance

Using the forecasts for additional employment land demand to 2026 and taking into consideration the traffic light assessment, the North London Waste Plan and the additional employment land that is already in the pipeline, the market balance requirements for the borough are calculated. Under Scenario 1 employment land requirements will be satisfied by the additional employment land already in the pipeline. For scenarios 2 and 3 there will be similar additional requirements of around 11 hectares.

The traffic light assessment found that the majority of employment clusters score well in terms of marketability sustainability and fitness for purpose and as such it is recommended that they should be kept in their current use. If necessary some of

the clusters should be considered for release with particular focus on the ones that scored poorly, i.e. Falkland Road Industrial Estate and Pricklers Hill. Estates such as Squires Lane, North London Business Park, Garrick Industrial Estate, Brunswick Industrial Park, Bittacy Hill and Granard Business Park are clear candidates for safeguarding.

The dominance of small occupiers in Barnet means that there is a strong case to safeguard those sites which would appear to meet local demand. These include some of the mid ranking sites such as Colindale Technology Park, Colindale Business Centre, Mill Hill Industrial Estate, Finchley Industrial Estate and Connaught Business Centre. There is a potential argument to safeguard Hadley Manor Trading Estate and Grenville Place as they would appear to be popular with current occupiers. Based on the traffic light multi criteria assessment, it is recommended that Falkland Road and Pricklers Hill are considered for release for alternative uses.

It is recommended that part of the additional forecast employment land requirement is satisfied by the redevelopment of the former Barnet Trading Estate which has already been earmarked for mixed use development. The partial redevelopment of Hadley Green Garage, including demolition of an existing building and erection of 1 building to provide Class B2/B1 commercial floorspace, should also be considered.

1 Introduction

1.1 *Background*

The purpose of the study is to provide an important part of the evidence base for the Barnet Local Development Framework (LDF) and inform and support the main Development Plan Documents (DPDs) including the Core Strategy, the Site Allocations and generic Development Management Policies.

The study has been commissioned by the London Borough of Barnet and has been undertaken by a multi-disciplinary team from Halcrow Group Ltd and Savills Commercial Research. The primary objective of the study is to assess the supply and demand for employment land and premises in Barnet over the period 2008-2026 and ensure the council's employment land portfolio is fit for purpose to meet current and future demand.

Employment Land¹ is one of the core infrastructure components necessary to aid sustainable growth. Planning authorities are required to demonstrate that industrial land portfolios are relevant and remain viable in the face of pressure from other higher land value uses as required by Planning Policy Statement 3 (PPS3). The recommended process for this is contained within the Office of the Deputy Prime Minister (ODPM) Employment Land Reviews Guidance Note which forms the basis for this study. The ultimate aim of the study is to justify the retention (or release) of industrial employment land in the face of pressure from alternative uses. Barnet's future economic growth is projected to be increasingly in service orientated employment and high level knowledge based jobs with growing numbers of higher skilled workers in financial, business and professional services. Over the next 15-20 years a new economic hub at Brent Cross and Cricklewood will emerge as the Gateway of North London. The projected job growth and the new Metropolitan town centre are expected to transform the sub-regional economy of North London.

Within this context, the Barnet Employment Land Review has the following objectives:

- Undertake a policy review to establish the study context;
- Undertake a strategic review of B use class property markets within the borough to offer a commercial insight to the study outputs;
- Analyse the existing supply of employment land and premises to provide a robust assessment of the borough's current employment land stock;

¹ Employment Land Reviews covers Business, General Industrial, Storage and Distribution, B classes and other similar uses. Other land uses that provide employment are planned for in other ways. (Source: Employment Land Reviews Guidance March 2008)

- Analyse the present and future demand for employment land and identify any gap or overprovision in the borough's supply of employment land; and
- Provide a clear hierarchy of employment sites that should be safeguarded, considered for redevelopment or released for other uses and recommend new sites for development if a need for new allocations is identified.

1.2

Methodology

The Employment Land Review has been undertaken in accordance with the ODPM Guidance Note on Employment Land Reviews (December 2004). The methodology has three main stages:

- Stage 1 - Taking Stock of the Existing Situation: this stage has two aspects. First, there is the need to establish the political, socio-economic and market forces influencing the supply and demand for employment land in Barnet. Second, this stage will include an audit of the borough's employment land stock. Such quantitative and qualitative intelligence will provide the necessary evidence base for future decision making and planning.
- Stage 2 – Creating a Picture of Future Needs: this stage focuses on forecasting employment land requirements for the borough. This is a twofold process, which includes establishing employment change scenarios for Barnet and translating these into future demand for employment floorspace and land.
- Stage 3 – Establishing a Portfolio to Meet Future Needs: this involves bringing together the findings of Stages 1 and 2, i.e. current and planned supply with future requirements. This aggregate analysis along with a qualitative site level appraisal will establish the future employment land portfolio for the borough including the level of land required, the sites to be retained and the scale and options for any new land allocations required.

1.3

Structure of the Report

The report is structured as follows:

- Chapter Two provides an overview of the economic, strategic and local policy context within which the study was carried out. The findings of this chapter identify the key current issues or those which are likely to come into play in the future;
- Chapter Three provides a review of the borough's commercial market for office, industrial and distribution space in the context of comparable employment markets outside the borough;
- Chapter Four details the existing supply of employment land across the borough, covering both quality and quantity and drawing on the visual site survey carried out in the first half of 2009;

- Chapter Five considers current and future demand for employment land in the borough under different employment change scenarios;
- Chapter Six presents the qualitative assessment of the existing land supply to establish the sites that are ‘fit for purpose’ to meet future demand requirements;
- Chapter Seven considers the borough’s market balance and considers potential new allocation locations; and
- Chapter Eight summarises the conclusions and provides key recommendations to inform the LDF process and future employment land policy.

2 **Barnet Context**

2.1 ***Introduction***

This section sets out Barnet's baseline situation in terms of strategic policy, local aspirations and profiles of the economy and the commercial property market.

2.2 ***National Policy Context***

National Planning Policy is set out within documents prepared by the Department of Communities and Local Government (DCLG), known as Planning Policy Guidance notes (PPGs). PPG's are gradually being replaced by Planning Policy Statements (PPSs). The relevant PPG's and PPS's are listed below, with the key principles from each one, in terms of employment policy, pointed out:

Planning Policy Statement 1: Delivering Sustainable Development, 2005 (PPS 1)

PPS1 sets out the overarching planning principles for the delivery of sustainable development through the planning system. It confirms that good planning should deliver the right development in the right place and time, and protect the environment. It identifies sustainable development as the core principle underpinning planning.

The four aims of sustainable development are:

- Maintenance of high and stable levels of economic growth and employment;
- Social progress which recognises the needs of everyone;
- Effective protection of the environment; and
- The prudent use of natural resources.

Planning Policy Statement 3: Housing 2006 (PPS 3)

PPS3 states that the Government's key housing policy goal is to ensure that everyone has the opportunity of living in a decent home, which they can afford, in a community where they want to live.

Local authorities should accommodate new housing growth taking into account opportunities for, and constraints on, development. Options may include the re-use of vacant and derelict sites or industrial and commercial sites for providing housing as part of mixed-use town centre development, additional housing in established residential areas, large scale redevelopment and re-design of existing areas, expansion of existing settlements through urban extensions and creation of new freestanding settlements.

Planning Policy Guidance 4: Industrial and Commercial Development and Small Firms 1992 (PPG 4)

PPG4 takes a positive approach to the location of new business developments and assisting small firms through the planning system. The key message is that economic growth and a high-quality environment have to be pursued together.

The spatial demands of industry should be a key consideration in drawing up plans. Development plans should weigh the importance of industrial and commercial development with that of maintaining and improving environmental quality.

Planning Policy Statement 4: Consultation paper on a new Planning Policy Statement 4: Planning for Prosperous Economies, May 2009

The consultation paper seeks views on how to combine all national planning policies in urban and rural areas and town centres into one consolidated and streamlined Planning Policy Statement.

Planning Policy Statement 6: Planning for Town Centres 2005 (PPS 6)

PPS6 encourages the creation of vital and viable town centres as an essential component of successful, thriving, safer and inclusive communities.

The main town centre uses are defined as retail, leisure and recreation uses, offices, arts, culture and tourism uses. In addition, housing will be an important element in most mixed-use, multi-storey developments.

The Government's key objective for existing town centres is to promote their vitality and viability by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

Planning Policy Statement 12: Local Spatial Planning 2008 (PPS 12)

This policy statement sets out the government's policy on the preparation of Local Development Documents which will comprise the Local Development Framework.

A key consideration is the element of "soundness", meaning that core strategies should be justified, effective and consistent with national policy. Therefore, Local Development Documents need to be founded on a robust and credible evidence base and identify the most appropriate strategy when considered against the reasonable alternatives. The Documents must also be deliverable, flexible and able to be monitored

Planning Policy Guidance Note 13: Transport 2001 (PPG 13)

PPG 13 encourages more sustainable forms of development, which can help to reduce the need to travel. Quality of life depends on transport and easy access to jobs, shopping, leisure facilities and services. The objectives of PPG 13 are to integrate planning and transport to:

- promote more sustainable transport choices;
- promote accessibility to jobs, shopping, leisure facilities and services by public transport, walking and cycling; and
- reduce the need to travel, especially by car

Planning Policy Statement 22: Renewable Energy 2004 (PPS 22)

PPS 22 states that the development of renewable energy resources is vital to facilitating the delivery of the Government's commitments on both climate change and renewable energy. Local planning authorities and developers should consider the opportunity for incorporating renewable energy projects in all new developments.

Planning Policy Statement 23: Pollution Control 2004 (PPS 23)

Decisions on planning applications for developments which may give rise to pollution, like all planning decisions, must be made in accordance with the development plan, unless material considerations indicate otherwise.

Material considerations may include the loss of amenity, which includes any pollution the proposal would cause (air and water quality) and waste management issues.

Planning Policy Guidance 24: Planning and Noise (PPG 24)

Development plans should give developers and local communities a degree of certainty about the areas in which particular types of development will be acceptable and those in which special measures may be required in order to mitigate the impact of noise, both in terms of businesses creating noise on site, and the noise produced by the travel generated by the employment use.

The Government's Planning White paper 2007 recognises that to be competitive, business needs to respond more efficiently to changes in market conditions.

2.3

Regional Policy Context

London Plan Consolidated with Alterations since 2004 (2008)

One of the six objectives of the London Plan is to make London a more prosperous city, with strong and diverse economic growth. For the 20 years to

2026 London's employment is forecast to grow by approximately 912,000. Policy 5B.1 sets out the following relevant priorities for the North sub-region:

- promote the contribution of the sub-region to London's world city role
- optimise the development of Opportunity Areas and Areas of Intensification
- ensure that the substantial expansion of population expected in North London is accommodated in sustainable communities, taking into account required infrastructure, access to employment and services, using exemplary approaches to waste, energy and water use management and provision
- manage the surplus industrial land taking into account waste management requirements
- work with the neighbouring regional and local authorities to develop a strategic approach to management of locations with major growth potential broadly along the London-Luton-Bedford corridor

The Plan also identifies Opportunity areas and Areas of Intensification that promote sustainable development in specific locations. Opportunity Areas are identified on the basis that they can accommodate significant new jobs or homes.

The most relevant for Barnet are:

- (i) The Cricklewood/Brent cross regeneration area – the Cricklewood railway lands and adjoining areas present a major opportunity for regeneration in the borough. Proposed employment capacity is 20,000 with 10,000 new homes
- (ii) Colindale: proposed capacity of 500 jobs and 10,000 new homes.

The Areas of Intensification incorporate high density redevelopment at key transport nodes. Barnet's key Area of Intensification is Mill Hill East with capacity of 500 new jobs and 3,500 homes.

Strategic Employment locations (SELs) are fundamental to policies for the retention and development of industrial and warehousing employment within the capital and comprise two types of area: Industrial business Park (IBP), for business requiring a high quality of environment (North London Business park (NLBP); and Preferred Industrial locations (PIL), Staples Corner (Barnet/Brent).

Industrial Capacity SPG March 2008

Having regard to the net reduction in industrial land demand and the careful management of vacancy rates, the London Plan indicates that there is scope to release 41 hectares per annum between 2006 -2026 or a total of 814 hectares.

The objectives of this Supplementary Guidance (SPG) are to provide detailed guidance about how the strategic policies in the London Plan should be applied to

manage industrial development capacity. The SPG seeks to ensure that sufficient land is available to meet future industrial needs bringing surplus industrial land back into use to meet other policy objectives. Specific guidance relevant to this study includes:

SPG1 sets out the requirement for a positive plan-monitor-manage approach to planning for industrial land using Sub-Regional Frameworks.

SPG2 seeks to promote SELs as the prime locations for industrial activity in London and resist the development of non –business uses on these locations.

SPG3 aims to protect locally important industrial sites outside the SEL framework after testing them against demand for such use.

SPG4 requires planning authorities to develop criteria based policies to manage the release or retention of other industrial sites and ensure that any release meets wider policy needs (housing being the first priority). North London Boroughs, including Barnet, are classed as a “Limited Transfer” area where local policies should reflect local difference in supply and demand instead of adopting a restrictive or permissive approach to release.

SPG5 refers to a positive approach to consideration of employment led mixed use development on strategically designated industrial sites or parts of sites, as long as it does not result in significant net loss of industrial employment capacity.

SPG8 promotes distribution facilities in suitable SELs with good transport accessibility.

Industrial and Warehousing Land Demand in London, 2004

The study confirms the estimate that some 50 hectares of industrial/warehousing land can be released annually to 2016.

North London Sub-Regional Development Framework, 2006

The (NLSRDF) presents the strategic development framework for North London, and pays particular attention to North London and pays particular attention to industrial and warehousing in neighbouring Enfield. It highlights the role of Mill Hill east and Colindale AAP in the provision of Strategic Employment Locations (SELs).

Emerging regional policies

London-Luton-Bedford corridor

The London-Luton-Bedford coordinated corridor is a growth area of regional importance, as highlighted in London Plan policy 1.3. Developments have been identified on the western side of the borough at Brent Cross as well as Colindale and Mill Hill East. Within the London-Luton-Bedford corridor and the North London sub-region the council will work with the Mayor, North London Strategic Alliance (NLSA) and neighbouring regional and local authorities including the North West London Boroughs (Brent, Camden and Harrow) to develop a strategic approach to the management of locations such as Brent Cross/Cricklewood, Colindale and Mill Hill east with major growth potential.

2.4

Opportunity Areas

Cricklewood, Brent Cross and West Hendon Development Framework 2004

The development framework supplementary planning guidance was adopted by the council in April 2004 and has been endorsed by the Mayor. In March 2008 the Brent Cross Cricklewood (BXC) Development Partners submitted an outline planning application for the comprehensive regeneration of the Brent Cross Cricklewood Area. The vision in the SPG is “to create a new gateway for London and a vibrant new urban area”.

The boundary of the regeneration area is defined by the A5 Edgware Road in the west, and the A41 Hendon Way in the east. Hendon Station is the northern most point and the A407 Cricklewood Lane is the southern most point. The Midland Mainline Railway passes along the western edge of the area, with Hendon and Cricklewood stations located at the northern and southern extremes respectively.

The scheme aims to create a new town centre, uniting the north and south of the A406. This will create a sustainable town centre comprising attractive residential environments, a major commercial core, an expanded and improved shopping centre and an attractive retail environment in the new High Street along with green spaces. This new town will be the catalyst for further economic growth in the surrounding area.

In total the scheme covers 151ha and will generate 7,500 new homes and up to 27,000 new jobs. It will be supported by extensive infrastructure works including new bridges, a new railway station and a replacement bus station.

Area Action Plans – Mill Hill East & Colindale

Mill Hill East Area Action Plan

The Council submitted the Mill Hill East Area Action Plan following the Examination in Public (EiP) in October 2009. The Area Action Plan was found to be ‘sound’ and was formally adopted by the Council on the 27th January 2009.

The Masterplan for the area includes:

- A total of around 2,660 residential units within the site. This is based on agreement with the Greater London Authority (GLA) in order to conform with the Mayor’s London Plan (2008)
- Space for new employment uses to create a minimum of 500 jobs;
- Creation of a new local high street and community hub with around 1,000sqm of retail floor space; a two form entry primary school; and provision of community and health facilities.

The focus for employment creation is the provision of small-medium sized workspace and support for local business. The target figure will be met through the following developments:

- Retention and zoning of the existing Bittacy Business centre as a Primary Industrial Site and designation of an additional 1 hectare of adjacent land for employment uses.
- Designation of IBSA House as an important local employment site;
- Potential redevelopment of Mill Hill East Station surrounds for commercial/retail/leisure use;
- Opportunities for new home working and home based business growth; and
- Community, education and retail uses in the local Hub.

Colindale Area Action Plan

In January 2009 Barnet Council consulted on their preferred options for the Colindale Area Action Plan (AAP) which is now at the submission stage. The Colindale AAP provides a well-informed coherent framework to help guide and deliver approximately 10,000 new homes and 1,000 jobs (including those planned at Grahame Park Estate and Beaufort Park) in accordance with strategic and local planning policy.

Colindale represents a major regeneration and sustainable development opportunity in the borough. The vision for Colindale is to create “A place where people want to live, work and visit”. The AAP incorporates the London-Luton-Bedford growth corridor.

2.6

Growth context for Barnet

In 2006 Barnet's population stood at around 328,600, representing 4.4% of London's total resident population. At the same time Barnet workplace employment (excluding self-employed) stood at 108,000 representing only about 2%-3% of London's total workplace employment. Barnet's economic performance over time has shown signs of slow-down. Over the most recent economic cycle (1997-2007) Barnet's employment grew on average by a moderate 0.3% per annum, as compared to an average of 0.8% per annum over the previous economic cycle (1986-1997).

The most recent GLA Economics borough employment projections show that overall employment in Barnet will grow by 10,000 jobs, from 131,000 in 2004 to 141,000 in 2016. Population is forecast to grow by about 46,000 between 2006 and 2016.

2.7

Occupational Groups

Within Barnet an increasing proportion of people are employed in the top three occupations: Managers and senior officials, professional occupations and associate professional & technical occupations. In 2007, 54% of the population were employed in these occupations.

2.8

Overall economic growth

According to the GLA Economics projections 2011 – 2026 between 2011 and 2026 the number of jobs in Barnet will grow by about 9% from 145,000 to 159,000. For the same period the number of jobs for London as a whole will grow by a slightly lower rate (8%).

Most of the Borough's larger employers are public sector institutions leaving the market-based sectors characterised by small enterprises (90% of firms employing fewer than 10 people). Within this growing small business economy, four sectors dominate:

- Retail and wholesale
- Hospitality
- Financial and business services
- Public Sector

The planned physical development and infrastructure growth for the Borough and the subsequent population increase is expected to lead to growth in sectors such as retail, hospitality and personal services sector in the Borough's town centres.

The planned physical development of Cricklewood, Brent Cross and (to a lesser extent) West Hendon will accommodate 27,000 jobs. Of these, it is expected that:

- Half will be in financial and business services

- A quarter will be in retail and hospitality
- 55% will require at least NVQ Level 3 qualification and 35% will require NVQ Level 4.
- 45% will be in the highest three occupational groups.

Approximately half of the new jobs (49%) will be by people resident in Barnet.
More specifically:

- 20% are expected to reside in central Barnet;
- 16% are expected to reside in west Barnet; and
- 13% are expected to reside in east Barnet²

The Three Strands Approach 2008

The "Three Strands Approach" sets out a vision and direction for future development, regeneration and planning within the Borough. The approach is based around the three strands of Protection, Enhancement and Growth. The third strand 'Growth' responds to Barnet's significant growth potential and sets out how and where sustainable strategic growth, successful regeneration and higher density can take place across the borough. The Three Strands Approach establishes Colindale, Mill Hill East and Brent Cross/Cricklewood as strategic areas for high quality sustainable growth within Barnet.

Barnet's Adopted Unitary Development Plan (UDP) 2006 Strategic Employment Policy Objectives:

- To consolidate and promote employment use classes (B1, B2 or B8) on the borough's primary industrial sites and business parks and safeguard them against redevelopment for non-business/industrial uses. (GEMP1)
- Retain land that meets strategic requirements for small, medium and large scale industrial users. If there is no realistic prospect of re-use purely for employment purposes, mixed-use development for employment and housing will be a priority. (GEMP4)

Primary Industrial Sites and Business Parks in Barnet (as defined in the adopted UDP):

- Industrial Business Parks are suitable for research and development (use class B1(b)) and light industry (use class B1(c)). This designation can also allow high technology office development.

² Source: The Labour market requirements of Growth in the London Borough of Barnet SQW Economic Development Consultants, January 2006

- Industrial Estates comprise a mix of light industry, general industry and storage and distribution activities (use classes B1, B2, and B8).
- Business/Technology Parks are concentrations of offices, research and development and light industry (use classes B1(a), B1(b) and B1(c)).

Designated employment sites

Industrial Business Parks

- North London Business Park

Industrial Estates

- Barnet Trading Estate, Park Road, Barnet
- Lancaster Road, Lancaster Road, New Barnet
- Hadley Manor Trading Estate, Moxon Street, Barnet
- Bunns Lane Works, Bunns Lane, Mill Hill
- Bittacy Business Centre, Bittacy Hill, Mill Hill East
- Falkland Road, High Barnet
- Brunswick Industrial Estate, Brunswick Park Road, Brunswick Park
- Queens Road, High Barnet
- Mill Hill Industrial Estate, Flower Lane, Mill Hill
- Pricklers Hill, High Barnet
- Garrick Industrial Estate, Garrick Road, West Hendon
- Connaught Business Centre, The Hyde
- Finchley Industrial Estate, High Road, North Finchley

Business/Technology Parks

- Colindale Business Centre, Colindale Avenue
- Colindale Technology Park, Colindeep Lane
- Grenville Place, The Hale
- Granard Business Centre, Bunns Lane, Mill Hill

Barnet Council Publications and Other Key Relevant studies

- Investing in a First Class City Suburb: Barnet Economic Strategy, Oct 2007
- Successful City-Suburbs for Successful City-Regions. Interim Report May 2007.
- Barnet: A Successful City Suburb, A Sustainable Community Strategy for Barnet 2008-2018
- North London Employment Study Final Report, May 2006, prepared for London Development Agency and North London Strategic Alliance. By Halcrow
- The Skills & Employment Profile for the New North London Sub-Region, June 2008, North London Strategic Alliance.

- Labour Market Requirements of Growth in the London Borough of Barnet report to the London Borough of Barnet SQW 2006.
- An Economic, Social and Environmental analysis of the English Suburbs State of the City Suburbs, 2007
- Barnet’s Three Strands Approach, 2008
- North London Business – Annual Business Survey 2009

2.9

Socio economic baseline

This section refers to a range of indicators to draw conclusions on the borough’s current socio-economic situation.

Barnet’s resident population was about 330,000 in 2007, with around 63% of those being of working age. The proportion of working age residents is well below the London average (66.9%) but is similar to the national average. This difference is mainly due to a higher proportion of people of pensionable age living in Barnet as compared to the London average.

Table 2-1: Total population (2007)

	Barnet	London	Great Britain
All people	329,700	7,556,900	59,216,200
Males	160,100	3,737,700	29,054,100
Females	169,600	3,819,200	30,162,100

Source: ONS midyear population estimates

Table 2-2: Working age population (2007)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
All people – working age	208,800	63.3	66.9	62.2
Males – working age	106,900	66.8	70.0	66.2
Females – working age	101,920	60.1	64.0	58.3

Source: ONS midyear population estimates % is a proportion of total population

Labour Supply

Barnet’s economic activity rate is below the London and national averages and the employment rate is lower than the London average. However, Barnet has a strong culture of self-employed people with close to 15% of those in employment being self-employment compared to around 11% for London and 9% for Great Britain. Though the performance of women in terms of economic activity and

employment is quite similar to that of London and Great Britain, men seem to underperform when compared to their counterparts in London and Great Britain.

A slightly higher proportion of Barnet's residents are employed part time as compared to the London average.

Table 2-3: Economically active (Apr 2007- Mar 2008)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
All people				
Economically active [†]	153,300	72.8	75.2	78.7
In employment [†]	145,800	69.3	70.1	74.5
Employees*	113,700	54.0	58.9	64.7
Self employed*	31,300	14.9	10.7	9.4
Model-based unemployed [§]	7,500	4.9	6.8	5.3
Males				
Economically active [†]	84,000	78.2	82.1	83.3
In employment [†]	81,300	75.7	76.7	78.8
Employees [†]	57,500	70.7	79.6	82.6
Self employed [†]	23,000	28.3	19.7	16.8
Unemployed [§]	#	#	6.6	5.5
Females				
Economically active [†]	69,300	67.2	67.7	73.7
In employment [†]	64,600	62.6	63.0	69.9
Employees [†]	56,200	87.1	89.9	91.9
Self employed [†]	8,400	12.9	9.5	7.4
Unemployed [§]	4,800	6.9	7.0	5.1

Source: ONS annual population survey

† numbers and rates for those of working age (16-59/64)

§ numbers and % are for those of working age. % is a proportion of economically active

Estimate is unreliable because sample size is too small (3-9)

* % is a proportion of people in employment in working age.

Table 2-4: Employment by hours worked (Apr 2007-Mar 2008)

	Barnet		London	GB
	Level	Rate		
All people				
Full time	115,500	79.2	80.6	76.3
Part time	29,500	20.3	19.2	23.6
Males				
Full time	72,900	89.7	89.2	90.2
Part time	7,500	9.3	10.6	9.7
Female				
Full time	42,600	65.9	69.4	59.2
Part time	22,000	34.1	30.5	40.7

Note: Rates are estimated as a proportion of working age people in employment
Source: Annual Population Survey

Table 2-5: Economically inactive (Apr 2007- Mar 2008)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
All people				
Economically inactive	57,200	27.2	24.8	21.3
Wanting a job	13,700	6.5	6.9	5.4
Not wanting a job	43,500	20.7	17.9	15.9
Males				
Economically inactive	23,400	21.8	17.9	16.7
Wanting a job	5,800	5.4	5.3	4.4
Not wanting a job	17,600	16.4	12.5	12.2
Females				
Economically inactive	33,800	32.8	32.3	26.3
Wanting a job	7,900	7.7	8.6	6.5
Not wanting a job	25,900	25.1	23.7	19.8

Source: ONS annual population survey

Notes: Numbers and % are for those of working age
% is a proportion of total working age population

In April 2007-March 2008 Barnet had a higher proportion of working age individuals who were inactive as compared to London as a whole. Inactivity is

more common amongst women as compared to men, with 32.8% of women being inactive, as compared to 21.8% of men. However, a higher proportion of inactive women would want to work as compared to inactive men.

Table 2-6: Employment by occupation (Apr 07-Mar 08)

	Residence based			Workplace based		
	Barnet	Barnet (%)	London (%)	Barnet	Barnet (%)	London (%)
groups 1-3	93,500	60.5	53.0	50,800	54.3	58.8
1 Managers and senior officials	32,000	20.7	17.7	14,900	15.9	20.0
2 Professional occupations	37,100	24.0	16.7	19,600	20.9	18.3
3 Associate professional & technical	24,400	15.8	18.6	16,300	17.4	20.5
groups 4-5	30,500	19.7	19.7	11,400	12.2	15.9
4 Administrative & secretarial	19,200	12.4	11.9	11,400	12.2	12.6
5 Skilled trades occupations	11,300	7.3	7.8	#	#	3.3
groups 6-7	16,800	10.9	13.1	16,100	17.2	13.2
6 Personal service occupations	9,700	6.2	6.8	9,500	10.1	7.1
7 Sales and customer service occupations	7,100	4.6	6.3	6,600	7.1	6.2
major groups 8-9	13,100	8.5	13.6	9,600	10.3	12.1
8 Process plant & machine operatives	2,100	1.3	4.5	#	#	3.8
9 Elementary occupations	11,000	7.1	9.1	9,600	10.3	8.3

Notes: Numbers and % are for those of 16+

% is a proportion of all persons in employment

Estimates unreliable because sample size is too small (3-9)

Source: Annual Population Survey

Employment by Occupation

Over half the employment in Barnet is within the top three occupations: managers and senior officials; professional occupations and associate and professional and technical type jobs.

Town Centre Employment

The Unitary Development Plan (UDP) sets out the Borough's retail hierarchy which comprises one regional shopping centre (Brent Cross), one major centre (Edgware), 14 district centres, five local centres and ten neighbourhood centres. There are also a number of out-of-centre retail facilities that do not form part of the town centre network.

Barnet like the other outer Boroughs relies on town centres for the majority of employment with retail as a particularly strong sector of economic activity.

Skills Levels

Barnet has a relatively higher proportion of people with higher qualification as compared to London and Great Britain. In 2007 the proportion of working age population with NVQ4+ stood at 39.9% for Barnet as compared to 37.4% for London and 28.6% for Great Britain. For the same year Barnet also had a relatively lower proportion of working age residents with no qualifications with 11.2% as compared to 12.8% for London and 13.1% for Great Britain.

Strong secondary school system and Academic achievement

The latest GCSE attainment data shows that average achievement rates for Barnet are above those for London. Barnet benefits from a strong secondary school system, excellent post-16 achievement rates, good higher education entry rates and high participation rates in adult education³. The achievement rate is above the sub-regional and London average with 70% of 16 year olds achieved 5 GCSE passes at A* - C in 2007⁴.

A higher percentage of children in Barnet achieved key stage 2 in English, Mathematics and Science, compared to the England average, in 2007. For the same year, around 68% of students achieved 5 A* - C GCSEs in Barnet as compared to around 60% for London and 59% for England. A figure of 17.1% for Barnet for A/As levels was above the figure for the NLSA sub region (14.8%) and for London as a whole (15.1%) but it is slightly below the national average point score of 17.8%.⁵

³ Source: Labour market requirements of growth in the London Borough of Barnet report to the London borough of Barnet SQW 2006

⁴ Source: NLSA study 2008

⁵ Source: Barnet Economic Development Study - Initial Baseline Overview, An interim Report, October 2002

Table 2-7: Qualifications (Jan 2007-Dec 2007)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
NVQ4 and above	83,700	39.9	37.4	28.6
NVQ3	25,100	12.0	12.3	15.6
NVQ2	23,300	11.1	11.5	15.9
NVQ1	19,700	9.4	9.5	13.6
Other qualifications	31,700	15.1	14.5	8.8
No qualifications	23,500	11.2	12.8	13.1

Notes:

Numbers and % are for those of working age

% is a proportion of total working age population

Source: ONS Annual Population Survey

Average weekly earnings

Barnet residents (including part-time workers), whether they work in the borough or elsewhere, earn on average more than the London median rate. However the median wage for males in Barnet is 22% higher than that for females.

Overall the average Barnet weekly resident earnings of £588.9, compares favourably with a figure of £580.8 for London and £479.3 for Great Britain.

Table 2-8: Earnings by place of residence (2008)

	Barnet	London	Great Britain
Gross weekly pay (£)			
Full-time workers	588.9	580.8	479.3
Male full-time workers	651.1	630.0	525.0
Female full-time workers	534.5	534.5	412.7
Hourly pay (£)			
Full-time workers	15.13	15.09	12.01
Male full-time workers	16.86	15.84	12.72
Female full-time workers	14.40	14.35	10.96

Source: ONS annual survey of hours and earnings - resident analysis

Note: Median earnings in pounds for employees living in the area.

Working-Age Benefits

The Jobseeker's Allowance (JSA) is payable to people under pensionable age who are available and actively seeking work of at least 40 hours a week. The rate of Barnet's JSA claimants is below that for London and Great Britain. A higher proportion of people aged 25-49 claim JSA as compared to the regional and national average. In addition, the vast majority of Barnet's claimants have been unemployed for 6 months or less.

Table 2-9 Total JSA claimants (September 2008)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
All people	4,350	2.1	2.9	2.6
Males	98,493	2.7	3.8	3.6
Females	1,500	1.5	1.9	1.5

Source: ONS claimant count with rates and proportions

Note: % is a proportion of resident working age people

Table 2-10: JSA claimants by age and duration (September 2008)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
By age of claimant				
Aged 18-24	1,070	24.9	26.7	53.2
Aged 25-49	2,495.0	58.1	57.9	15.1
Aged 50 and over	720	16.7	15.0	15.1
By duration of claim				
Up to 6 months	3,135	73.8	69.8	74.1
Over 6 up to 12 months	685	16.1	17.0	15.4
Over 12 months	430	10.1	13.2	10.5

Source: ONS claimant count - age and duration

Note: % is a proportion of all JSA claimants

Table 2-11: Working-age client group - key benefit claimants (May 2008)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
Total claimants	23,280	11.1	13.9	13.9
Job seekers	3,550	1.7	2.5	2.1
Incapacity benefits	10,290	4.9	6.0	7.0
Lone parents	4,880	2.3	3.0	2.0
Carers	1,540	0.7	0.8	1.1
Others on income related benefits	1,070	0.5	0.6	0.5
Disabled	1,480	0.7	0.7	1.0
Bereaved	470	0.2	0.2	0.3

Note: % is a proportion of resident working age people

Source: DWP benefit claimants - working age client group

Table 2-12: Jobseeker's Allowance (JSA) Claimants (March 2009)

	Barnet (numbers)	Barnet (%)	London (%)
All people	6,445	3.1	4.0
Males	4,228	4.0	5.3
Females	2,217	2.2	2.6

Source: Office for National Statistics Barnet employment by sector

The vast majority of employment within Barnet is in the service sector in particular the following areas:-

- (i) Distribution, hotel and restaurants
- (ii) Financial services
- (iii) Public administration, education and health

Table 2-13: Barnet jobs (excluding self-employment, 2007)

	Barnet employee jobs	As a proportion of total Barnet employee jobs
Total employee jobs	106,645	100%
Full-time	70,190	66%
Part-time	36,445	34%
Employee jobs by industry		
Manufacturing	3,232	3%
Construction	3,671	3%
Distribution, hotels & restaurants	30,162	28%

	Barnet employee jobs	As a proportion of total Barnet employee jobs
Transport & communications	5,092	5%
Banking, finance and insurance, etc	25,280	24%
Public admin, education & health	32,059	30%
Other services	6,906	6%

Source: ONS Annual Business Inquiry, employee analysis

Whilst Barnet’s residents appear to earn more than residents elsewhere in London, Barnet as a workplace appears to offer lower paid jobs compared to elsewhere in London. On average, full time workers are paid around 18% less when compared to the London average. The difference is much larger for men who are paid around 26% less in Barnet compared to London as a whole. Women, working full time are paid around 8% less.

Table 2-14: Earnings by place of work (2008)

	Barnet (£)	London (£)
Gross Weekly Pay		
Full-time workers	517.4	612.7
Male full-time workers	536.3	676.5
Female full-time workers	504.1	542.1
Hourly Pay		
Full-time workers	13.18	15.83
Male full-time workers	12.98	17.04
Female full-time workers	13.41	14.66

Source: Nomis- Annual Survey of Hours and Earnings

Businesses Formation

Barnet witnessed 68 VAT registrations per 10,000 adult population in 2007. Based on trends between 1994 – 2004 (SQW study 2006) Barnet’s VAT registrations are significantly higher than most adjoining Boroughs and comfortably higher than comparable outer London Boroughs. However in recent years the Barnet entrepreneurship rate has converged closer to the London average as shown in the table below.

Table 2-15: VAT Registrations per 10,000 adults

	2005	2006	2007
Barnet	57	57	68
London	64	58	67

Source: BERR

Note: VAT registrations expressed as a proportion of the 16064 “working age” adult population

The survival rate of VAT- based businesses is similar in Barnet as in London as a whole: 22% of businesses have traded for less than 2 years and 36% for at least 10 years⁶.

Table 2-16 VAT registered businesses (2007)

	Barnet	Barnet (%)	London (%)	Great Britain (%)
Registrations	1,750	11.7	13.4	10.6
De-registrations	1,575	10.5	9.0	7.6
Stock (at end of year)	14,965			

Source: DBERR - vat registrations/de-registrations by industry
% is a proportion of stock (at end of year)

Deprivation in Barnet: Results from the English Indices of Deprivation 2007

According to the 2007 Index of Multiple Deprivation, Barnet is more deprived in relation to other local authorities than it was in 2004⁷. Barnet’s overall deprivation level is above the middle point in the national ranking, close to the top third most deprived local authorities. Deprivation is measured across seven different domains and six sub-domains, which represent different types of deprivation. The two sub-domains with most significant deprivation in Barnet relative to the rest of the country are “wider barriers to housing and services”, and the “outdoors living environment”. With respect to the “wider barriers to housing and services” it is useful to bear in mind that the domain results were distorted by homelessness data that was calculated differently between 2004 and 2007. However, there was an increase in numbers and percentages of Barnet residents in income and employment deprivation between 2004 and 2007. Burnt Oak and Colindale remain the most deprived wards in Barnet by a significant margin as was the case in 2004.

⁶ Source: Small Business Service, March 2005

⁷ <http://www.barnet.gov.uk/deprivation-in-barnet.pdf>

3 Property Market Overview

This section provides a review of the market for office, industrial and distribution space in Barnet Local Authority District. It examines characteristics of the District's commercial property market such as take up, availability and rents in comparison to neighbouring competing locations.

3.1 *Office Property Market Overview*

Introduction

In the wider London context, Barnet is not viewed as a strategic office location as office related economic activity is largely concentrated in Central and Eastern London. However, Barnet is a key office location in the context of the North London sub-region.

In economic terms the local market place is not prepared to pay rent which is adequate to finance the build cost of new offices. The perceived notion that Central London based companies would out-source their “back room” operation to cheap fringe locations has not materialised to any great extent and thus office demand in the borough has tended to come almost entirely from companies who are historically located or service companies such as solicitors, accountants and local authorities.

The location of office buildings is spread throughout the borough but the following areas are highlighted:

- The A1000 through Whetstone and Finchley has a variety of detached office buildings, of varying ages generally 1960s/1970s; including along the A5 around Hendon.
- The key “town centres” have some form of office content, either in bespoke buildings or above shops. The only clearly identified office park would be North London Business Park.
- Whilst demand does exist from local occupiers we cannot perceive that in the near future any large scale speculative office development will be forthcoming.

At present, there are six major office locations in Barnet. Four of these locations are in and around the town and district centres (Edgware, Hendon, Golders Green, and Finchley Central) while the remaining two areas are business parks (North London Business Park and The Hyde). The office stock tends to consist predominantly of office uses ancillary to the main retail uses. The main exceptions are North London Business Park and The Hyde which offer a mix of office sizes and industrial uses.

The majority of office units are relatively small (up to 5,000 sq ft/465 sq ms) and located within or at the edge of the town centres. Key occupiers include accountancy and solicitor's firms. The *Barnet Town Centres Floorspace Needs Assessment (April 2009)* states that supply is adequate to meet current demand levels but there is no capacity for large scale developments to attract larger occupiers to the borough.

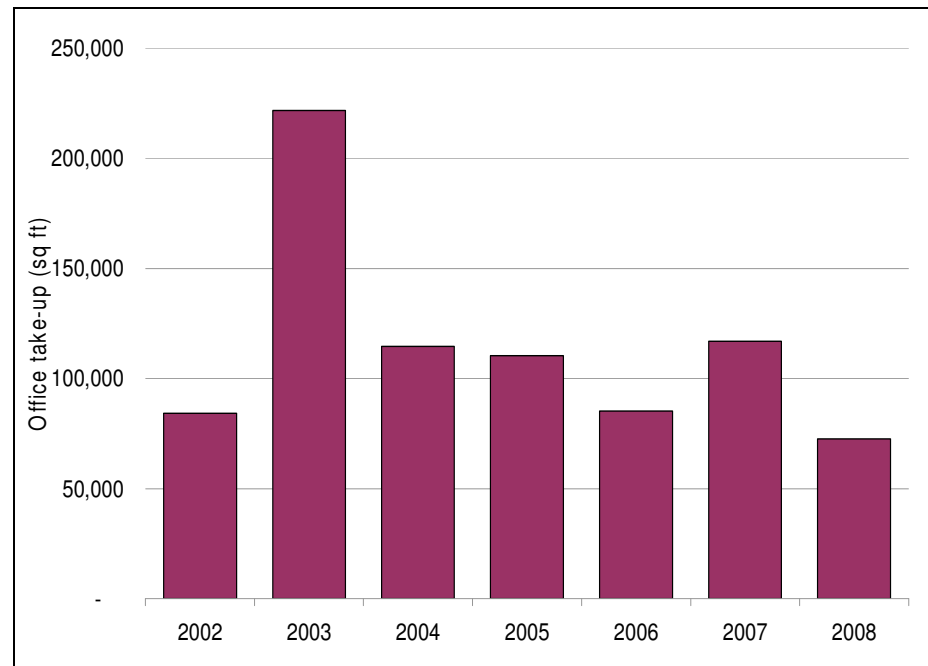
The following section examines the office property market using data sourced from Focus, the on-line property database company. The trends presented in the charts are a fair reflection of the changing market characteristics during the past few years.

Take-up

Barnet has approximately 4.8 million sq ft of office floorspace (DCLG/Valuation Office floorspace statistics 2007). Despite its relative proximity to Central London and access to the underground network it has not built a reputation as a prime office location and does not tend to attract significant numbers of large scale occupiers. This is due to a number of factors. Its proximity to Central London has in fact acted against it to some extent as it is competing against other office locations in more central areas of London. The borough's generally 'suburban' nature and relatively poor motorway networks has also meant it has struggled to compete with centres/locations closer to the M25 for those larger occupiers who value motorway access. The lack of large-scale private investment to date, meaning that the availability of new grade A stock is limited, has also acted to reduce the district's attractiveness.

Since 2002, office take-up in Barnet has totalled approximately 806,000 sq ft with an average over this period of just over 115,000 sq ft per annum. There was a peak in take-up in 2003, 93% greater than the seven-year average with two significant transactions at North London Business Park totalling 140,000 sq ft both of which were public sector occupiers (Barnet Council, Barnet College and Middlesex University). Take-up in the following five years remained relatively steady averaging approximately 100,000 sq ft per annum. 2008 saw the lowest annual take-up rate of 72,500 sq ft, most likely in response to a fall in occupational demand on the back of the slowdown in the global economy.

Figure 3-1: Barnet office take-up (floorspace sq ft)

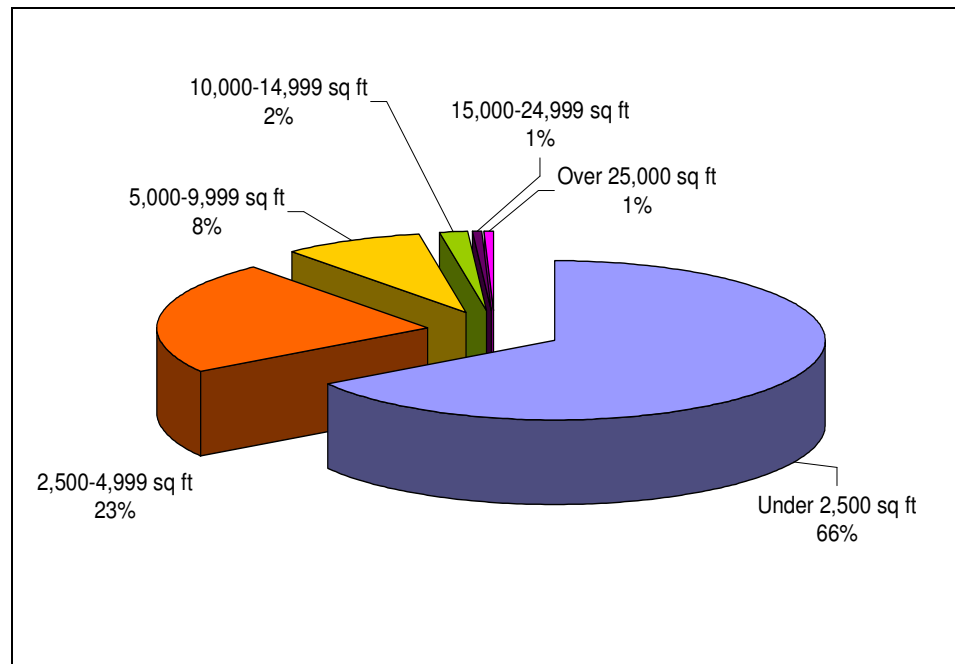


Source: Focus 2009

Take-up in Barnet is dominated by leasing transactions for under 2,500 sq ft. Over the last five years, based upon number of deals, 89% has been for space for under 5,000 sq ft, the bulk of which (74%) is for space of under 2,500 sq ft. This includes tenants such as small insurance companies, solicitors, building firms and publishers. This reflects the nature of the office market in Barnet as it does not tend to attract significant numbers of large ‘in-coming’ occupiers compared to locations with better motorway access or those in more central areas of London.

Barnet in essence is a relatively localised market, reinforced by the quality of stock on offer. For example, according to the Valuation Office, 61% of office floorspace in the borough is pre-1970’s, which is inappropriate for large scale modern occupiers as these older buildings struggle to accommodate air-conditioning systems and the open plan lay-outs preferred by occupiers.

Figure 3-2: Office take-up (sq ft) by size band (last 5 years)



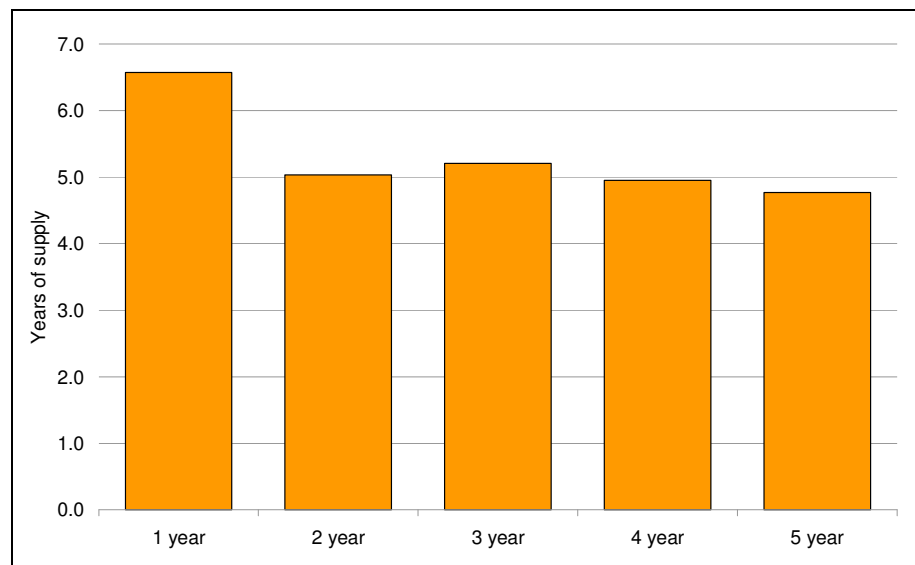
Source: Focus 2009

Availability

Current available supply in Barnet totals 476,000 sq ft. Taking into account average take-up over the last five years of just under 100,000 sq ft per annum, suggests that, based on current supply, there is currently 4.8 years worth of supply in the market place.

Changes in historical take-up means that the years supply figure can fluctuate. The level of fluctuation in the years supply figure will identify whether current supply is constrained or oversupplied. To run this sensitivity the years supply based on annual average take-up for the last 1, 2, 3, 4 and 5-year periods are presented in Figure 3.3. What is shown is that on the whole there is very little difference in the level of supply based on the changes in annual take-up over the last 5 years. There was a peak in ‘years supply’ based on the 1year average due to a drop in annual take-up in 2008 following the economic downturn, which limited occupational demand. Depending upon which annual average is used there is anything between 4.8 and 6.6 years in the market at present. It is generally assumed that any market with more than two years would be considered to be oversupplied. As companies vacate current premises and with new space coming onto the market going forward the years supply analysis does not mean that the amount of available business space will run out within a given period. Although given the current economic conditions, there will be very little new space coming to the market over the short term.

Figure 3-3: ‘Years of supply’ of office floorspace using varying annual averages



Source: Focus 2009

In line with Barnet’s office market, which is focused on local small occupiers, 63% of available units are less than 2,500 sq ft. There are no units available over 50,000 sq ft with only 3% of available units sized between 25,000 and 50,000 sq ft. This is more likely to reflect lack of supply of these larger units/floorplates rather than strong levels of demand in these size bands. The suburban nature of the area and its relatively poor motorway access compared to centres closer to the M25 has restricted any form of large scale development with large floorplates. As a result this has added to the inability of the area to attract larger companies. Rather it is seen as a localised market servicing local, small-scale demand. While this analysis is based on past trends, it is not necessarily a reflection of the future prospects for the entire borough of Barnet. There is a potential for new delivery of office stock to reinvigorate the market.

The Brent Cross Cricklewood regeneration scheme which will encompass Brent Cross and its surrounding area, particularly land to the south of the North Circular Road, envisages the creation of a new ‘mixed use’ town centre⁸. The scheme is currently going through the planning process and aims to deliver approximately 5million sq ft of business use floorspace (B1, B2 and B8). This will significantly increase office supply in the borough. Based on its location and new and improved public transport services that will provide additional capacity including a proposed bus station and rail station, means it may have the ability to attract large occupiers. Although this will depend on the floorplates/ buildings that are available. Apart from this there are some known small scale projects in the

⁸ Cricklewood, Brent Cross and West Hendon Regeneration Area Development Framework SPG 2005

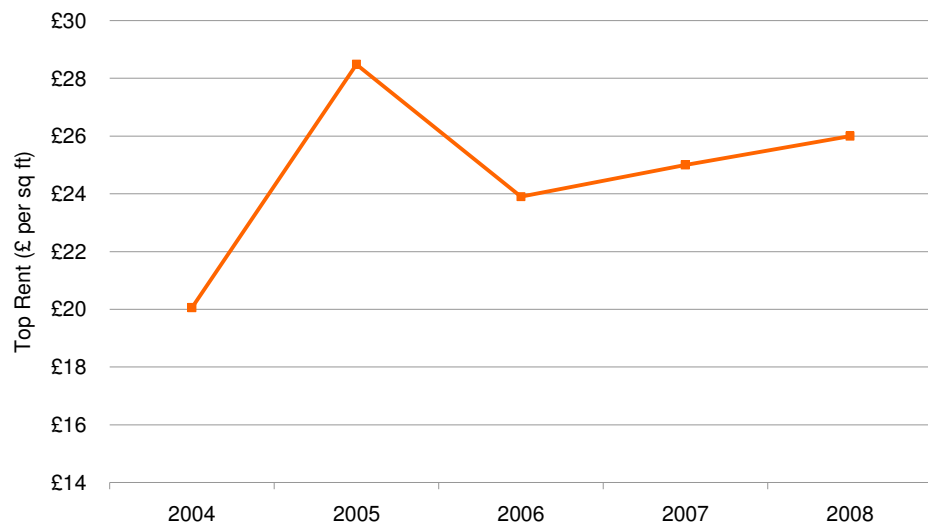
development pipeline, the majority of which are delivering new office space as part of mixed use schemes.

Rents

With regards to rental performance, Savills presents the top rental levels achieved for offices in Barnet, in Figure 3.4. Since 2006 top rents have seen a steady increase of approximately 4% per annum after coming down from a peak of £28 per sq ft in 2005. This is in line with average rental value growth for the borough as recorded by IPD (Investment Property Databank), which has averaged 2.2% per annum over the last five years. In 2008 the top rent achieved was £26 per sq ft.

The dominance of lease transactions for small units under 2,500 sq ft, means that rents are high on a £ per sq ft basis. For example, the 2008 high of £26 per sq ft reflects a lease transaction of under 500 sq ft. As a result of excluding leasing transactions of under 2,500 sq ft, the top rent achieved in 2008 falls to £15 per sq ft. Going forward the current economic slowdown is likely to produce some downward pressure on rents.

Figure 3-4: Top rents per sq ft achieved for offices



Source: Focus 2009

Comparable office locations

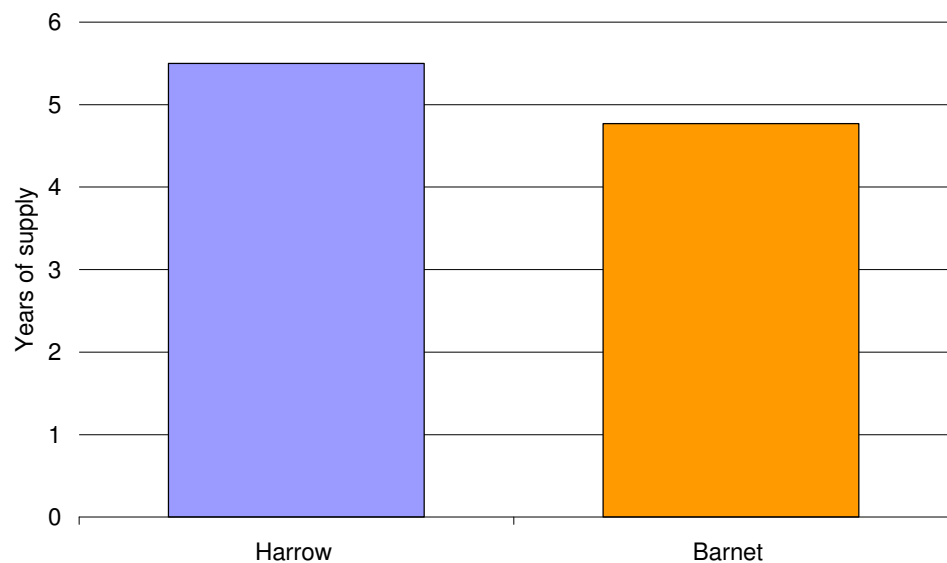
In terms of comparable office locations, the neighbouring borough of Harrow was selected (containing the centres of Harrow, Stanmore and Pinner). This selection was based on its proximity and it also being a London Borough. The district is also characterised by a localised market largely serving local demand.

Despite its similarity to Barnet, the borough of Harrow has not seen the same level of demand. Take-up since 2002 has totalled 380,600 sq ft, less than half of that seen in the borough of Barnet. Average take-up over the last 5 years has also underperformed against Barnet, averaging just under 57,000 sq ft per annum compared to Barnet’s 100,000 sq ft per annum over the same period.

This difference between the two boroughs is also borne out in the ‘years of supply’ analysis. Harrow has 5.5 years worth of supply, whereas Barnet has 4.8 years, based on average take-up per annum over the last 5 years and current availability (see Figure 3.5). While the numbers are relatively similar, Barnet’s lower ‘years supply’ figure would suggest stronger levels of demand for office space compared to that seen in Harrow.

We suspect the stronger levels of demand for space in Barnet reflects its positioning on the North Circular Road and M1. Harrow does not enjoy the same road links.

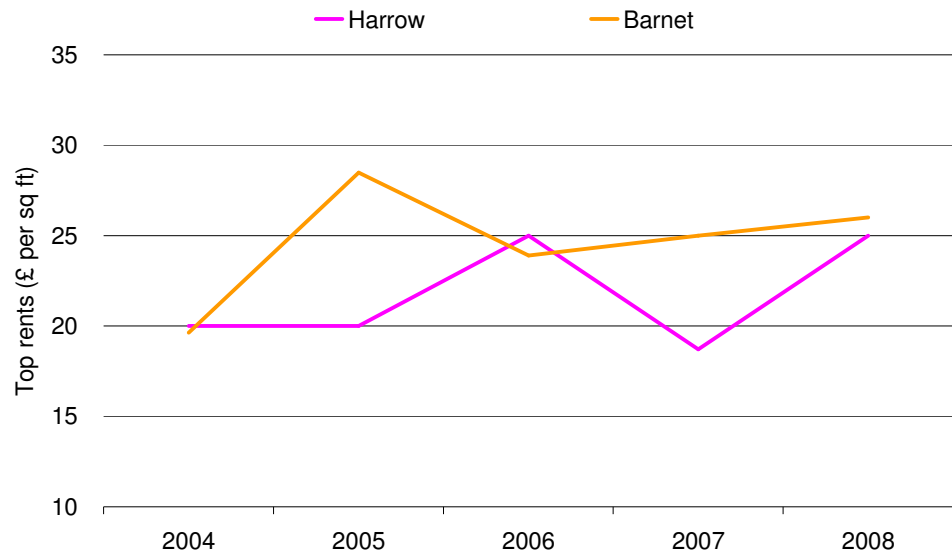
Figure 3-5: Comparable office locations – ‘years of supply’



Source: Focus / Savills

In line with its stronger levels of demand, top rents in Barnet have tended to outstrip those achieved in Harrow. Top rents in 2008 (including all leasing transactions) were £26 per sq ft (see Figure 3.6) marginally higher than the £25 per sq ft achieved in Harrow. While this is not a significant difference, it is worth noting that Harrow’s rental levels have been bolstered by its larger proportion of leasing transactions for smaller units as opposed to that seen in Barnet. For example, in Harrow 78% of these transactions were for units under 2,500 sq ft as opposed to 66% in Barnet.

Figure 3-6: Competing office locations – top rents achieved per sq ft



Source: Focus / Savills

3.2

Industrial Property Market Overview

Industrial stock in Barnet totals approximately 4.7 million sq ft according to the 2007 Valuation Office rateable floorspace statistics. As with its office stock, Barnet is not a prime industrial location due to its suburban nature and relatively poor road links. Barnet’s industrial stock tends to serve local demand for industrial space, rather than attracting any significant numbers of large ‘in-coming’ occupiers.

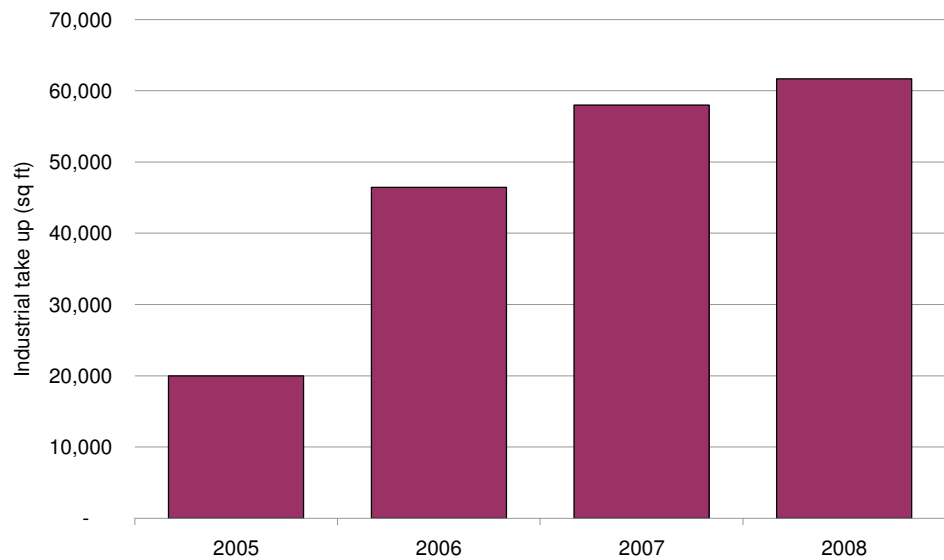
Due to the nature of supply in the borough, which is dominated by small units typically under 5,000 sq ft, there are ‘gaps’ in the data as leasing transactions for small industrial units does not tend to be picked up by the market. However, despite this, we believe that the trends presented in the charts are a fair reflection of the changing market characteristics that have taken place during the past few years.

The industrial market covered in this section includes all types of industrial-related property. This ranges from light industrial (B1c) to warehouse (B8) property.

Take-up

Since 2005, the annual take-up of industrial space has been steadily increasing in the borough, with take-up since 2005 totalling 186,000 sq ft. Average take-up over this period has been just 46,500 sq ft per annum, with 2008 seeing a peak close to 62,000 sq ft, 33% higher than the 2005 to 2008 average.

Figure3-7: Barnet industrial take-up (floorspace sq ft)

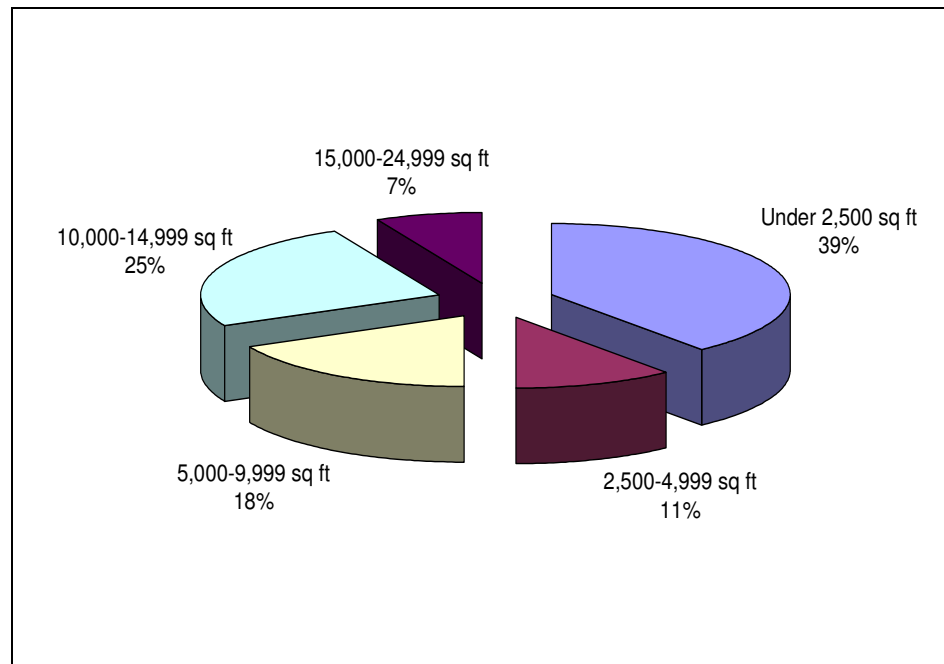


Source: Focus 2009

As with the office market in Barnet, take-up is dominated by lease transactions for small space. Since 2005 39% of these transactions were for units under 2,500 sq ft, with a further 25% for between 10,000 and 15,000 sq ft. There were no leasing transactions for space in excess of 25,000 sq ft (see figure 3.8).

It is likely that local companies will continue to drive the market going forward. It is worth noting that, due to the economic downturn, net additional demand is likely to be suppressed.

Figure 3-8: Industrial floorspace take-up (sq ft) by size band (since 2005)



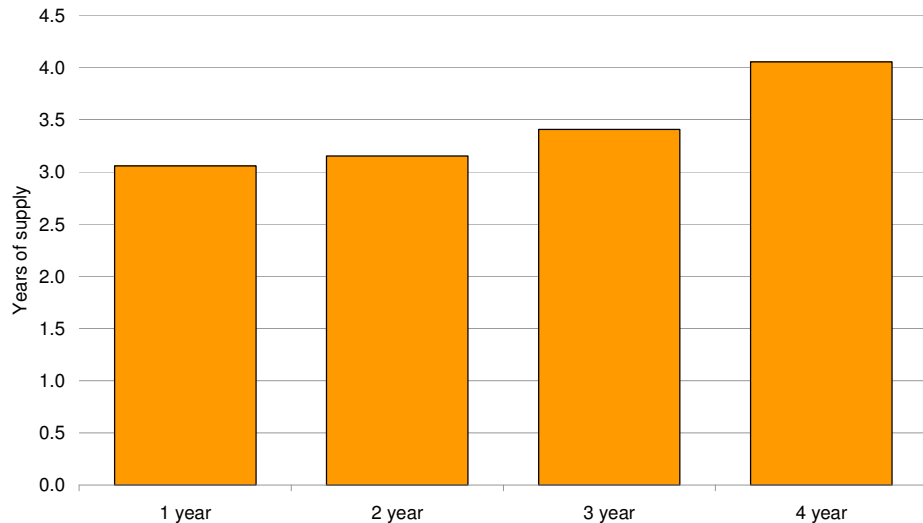
Source: Focus 2009

Availability

Current industrial floorspace availability in Barnet stands at just under 189,000 sq ft. This equates to 4.1 years worth of supply based on average annual take-up since 2005.

Changes in historical take-up means that the years supply figure can fluctuate. The level of fluctuation in the years supply figure will identify whether current supply is constrained or oversupplied. To run this sensitivity the years supply based on annual average take-up for the last 1, 2, 3, and 4-year periods are presented in Figure 3.9. Due to the steady increase in annual take up from 2005 through to 2008, 'years supply' based on the one year and two years averages is relatively low at 3.1 and 3.2 years. This is lower than that seen for offices over the same period. This does not necessarily suggest greater levels of demand for industrial space as opposed to offices rather that industrial supply is relatively constrained. Depending on what average is used there is anything between 3.1 and 4.1 'years of supply' in the market. As already detailed for offices, anything over two years is considered over supplied, although this analysis does not mean that industrial supply will run out within a given period as new space will come to the market as companies vacate premises and new space is developed. Having said this, due to current market conditions it is unlikely that any speculative industrial development will take place over the short-term.

Figure 3-9 ‘Years of supply’ of industrial floorspace using varying annual averages



Source: Focus 2009

Available stock in Barnet is dominated by units under 2,500 sq ft (61%) with very little supply of larger units. For example, there are no available units between 10,000 and 15,000 sq ft. This suggests potentially strong levels of demand for larger units in this size band, reinforced by the fact that historically there have been strong levels of take-up for these sized units. For example, since 2005 units of between 10,000 to 15,000 sq ft have accounted for 25% of leasing transactions, second to that for space of under 2,500 sq ft, which accounted for 39% of leasing transactions.

As already mentioned the Brent Cross Cricklewood regeneration scheme will deliver approximately 5million sq ft of business use floorspace, some of which will include light industrial and warehousing & distribution. This will significantly increase industrial supply in the borough.

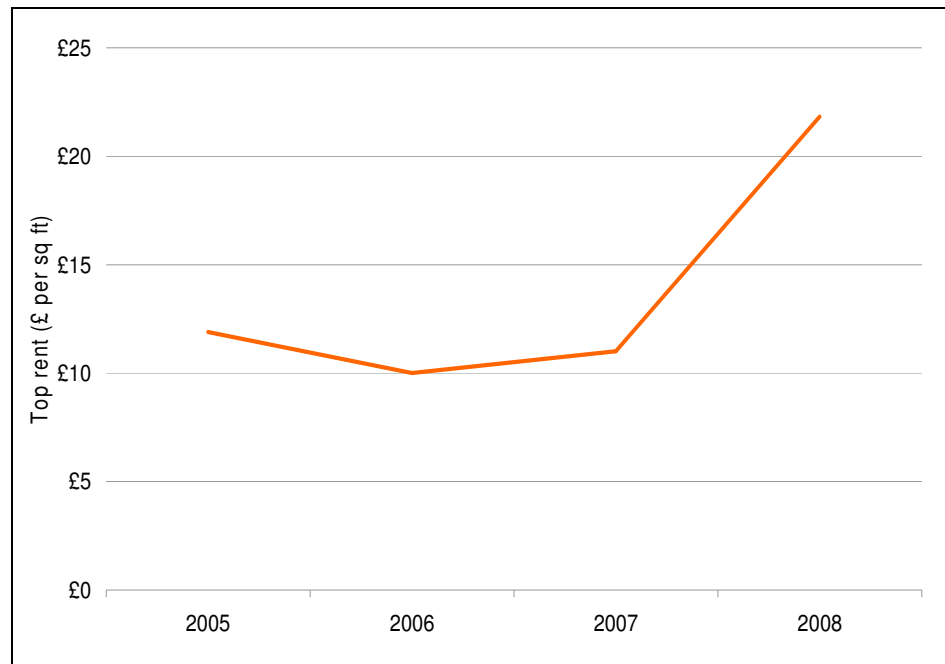
Rents

With regards to rental performance, using the data retrieved from the take-up data for industrial/ warehouse space, Savills has presented the top rental levels achieved in Barnet in Figure 3.10. It is interesting to note that Barnet is not covered by Investment Property Databank (IPD) suggesting that it is not considered a key industrial location for investment.

There was a marginal drop in top rents in 2006 from £12 in 2005 to £10 per sq ft. Following this small drop, top rents saw a steady climb reaching £22 per sq ft in 2008 which was almost double that achieved in 2007. As smaller units tend to

achieve higher rents than that for larger space, it is worth noting that the £22 per sq ft achieved in 2008 was for a unit of less than 1,000 sq ft. If leasing transactions less than 2,500 sq ft are excluded from the analysis the top rent achieved in 2008 was £9 per sq ft.

Figure 3-10: Top rents per sq ft achieved for industrial/warehouse space



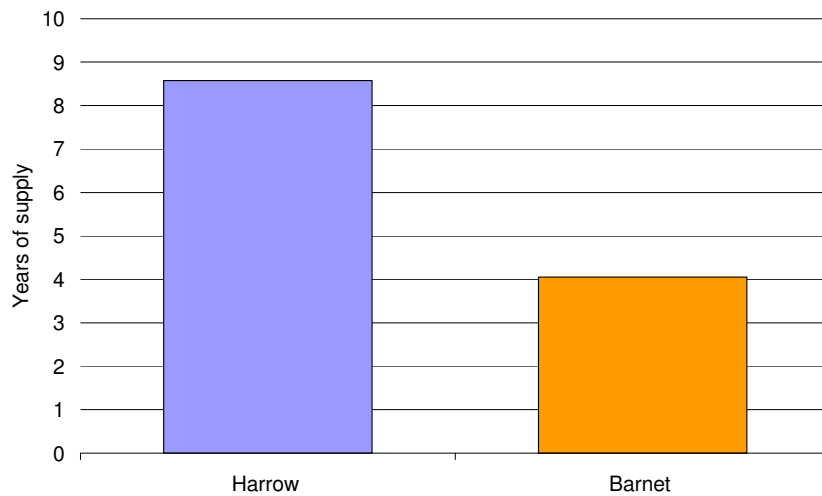
Source: Focus / Savills

Comparable industrial/warehouse locations

As with the office market the comparable industrial location is the borough of Harrow (containing the centres of Harrow, Stanmore and Pinner) based on its proximity and it also being a London Borough. The area is also characterised by a relatively localised market.

Take-up since 2005 has been lower than that seen in Barnet averaging just over 15,000 sq ft per annum, only a third of that seen in Barnet over the same period. This lower level of demand is also supported by the ‘years of supply’ analysis. As shown in Figure 3.11 Harrow has a higher number of ‘years of supply’ with 8.6 years based on average take-up per annum since 2005. This would suggest lower levels of demand for industrial space in Harrow as opposed to Barnet. Barnet’s positioning on the North Circular and M1 has no doubt helped to fuel higher levels of demand in comparison, which means it has been more successful at attracting larger occupiers than Harrow where the same road links do not exist.

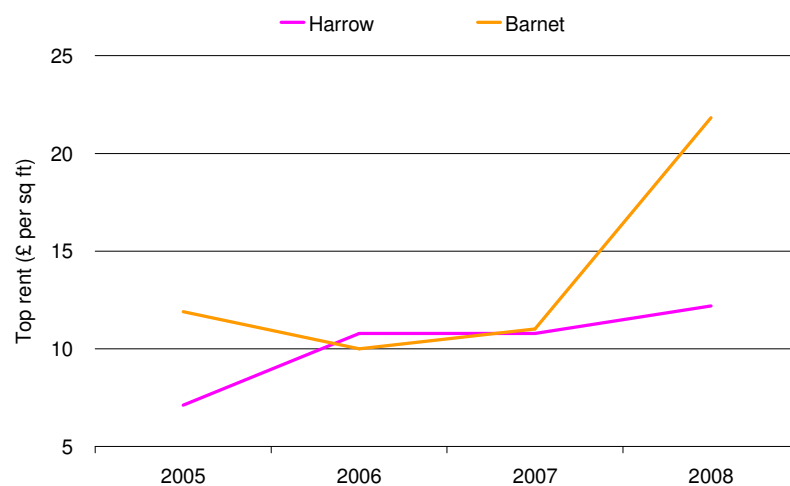
Figure 3-11: Competing industrial/warehouse locations – ‘years of supply’



Source: Focus / Savills

On the whole there has been very little differential in terms of top rents between the two boroughs. Barnet did see a peak in rents in 2008 although this was due to a small leasing transaction of less than 1,000 sq ft. Based on all leasing transactions between 2005 and 2008, top rents have averaged £10 per sq ft in Harrow and £14 per sq ft in Barnet. This highlights the stronger levels of demand for industrial space in Barnet as opposed to Harrow as already noted through the ‘years of supply’ analysis.

Figure 3-12: Competing industrial/warehouse locations – top rents achieved per sq ft



Source: Focus / Savills

4 Current Employment Land Supply

4.1 *Introduction*

The supply analysis aims to develop a comprehensive database that will set out the availability of employment land across the borough. This database is created through a visual site survey that provides information at an individual site level. The objective of the survey was to obtain a clear and robust picture of the existing provision of employment land and premises in Barnet in terms of quantity and quality, considering the opportunities and limitations of the existing employment sites and premises. Information gathered is consistent with the key requirements of the ODPM Guidance Note on Employment Land Reviews.

The visual site surveys were undertaken by Halcrow between December 2008 and January 2009. They covered all employment sites in B use classes as well as sites in non-B use classes that are part of a wider employment area. The results of the surveys were subsequently mapped using Geographical Information Systems (GIS) to allow the supply of employment land to be quantified and analysed by use class and other characteristics.

4.2 *Current stock of employment land*

During the site surveys Halcrow identified 101 ha of land in Barnet that are currently designated as employment land. This is a gross employment land estimate that includes open space, roads etc. When roads and open spaces are excluded, the net employment land totals approximately 42 hectares. It should be noted that the net employment land estimate includes employment land that is currently vacant or that is not in B Class Use (retail units, car repair services etc.)

Existing Uses

In accordance with the Town and Country Planning Use Class Orders 1987 and its subsequent amendments, sites in Barnet fall into a Use Class based on the type of activity they accommodate. The most relevant Use Classes are:

- (a) B1 = offices, research and development, light industry
- (b) B2 = general industrial
- (c) B8 = storage and distribution
- (d) Sui generis = use of its own that does not fall into any of the other use classes (e.g. Motor Car Showrooms)

The breakdown of employment land by use class is presented in **Table 4-1** below. It should be noted that the following figures are subject to an error margin as they

are based on visual site surveys and GIS calculations. Nonetheless, they provide a good estimate of the supply of employment land at the time of the site surveys.

Table 4-1: Barnet employment land breakdown

Use Class	Size in hectares	Percentage
B1	6	15%
B2	6	15%
B8	6	14%
Under Development	2	5%
Non B Use Class	17	43%
Vacant	3	7%

Source: Halcrow

From the currently designated employment land around 15% is used for B1 purposes; 15% is used for B2 purposes and 14% for B8 purposes. Therefore approximately 44% of the employment designated land is currently in B Use Class employment use. Around 5% of the designated employment land is currently under development. This land includes Arbitar House, Barnet Trading Estate and the former Forumside (which is considered as part of a town centre strategy for Edgware). A further 7% of employment land is vacant and around 43% is not in B class uses.

Table 4-2 shows Barnet’s employment clusters including gross and net employment land. It should be noted that the table includes only those clusters that are currently used as employment land and do not have planning applications or permissions for change of uses.

Table 4-2: Barnet's Employment Land Clusters

	Number of sites	Gross employment land (ha)	Net employment land (ha)	Net employment land (%)
Bittacy Business Centre, Bittacy Hill, Mill Hill East	17	4.8	0.9	5
Brunswick Industrial Park, Brunswick Park Road, Brunswick Park	13	4.0	1.8	10
Bunns Lane Works, Bunns Lane, Mill Hill	20	0.4	0.4	2
Colindale Business Centre, Colindale Avenue	10	1.6	1.0	5
Colindale Technology Park, Colindeep Lane	7	0.9	0.3	2
Connaught Business Centre, The Hyde	20	0.9	0.5	2
Falkland Road Industrial, High Barnet	12	0.6	0.3	2
Finchley Industrial Estate, High Road, North Finchley	9	29.1	0.6	3
Garrick Industrial Estate, Garrick Road, West Hendon	17	7.3	2.9	16
Granard Business Centre, Bunns Lane, Mill Hill	4	0.4	0.2	1
Grenville Place, The Hale	3	1.6	1.6	9
Hadley Manor Trading Estate, Moxon Street, Barnet	4	0.9	0.4	2
Lancaster Road Industrial, Lancaster Road, New Barnet	15	1.4	0.7	4
Mill Hill Industrial Estate, Flower lane, Mill Hill	6	1.4	0.5	3
North London Business Park, Oakleigh Road South	6	12.3	2.6	14
Pricklers Hill, High Barnet	8	0.5	0.3	2
Queens Road Industrial Estate, High Barnet	17	1.0	0.4	2
Redrose Trading Estate, Lancaster Road, New Barnet	4	0.2	0.1	0
Regents Park Road Employment Cluster, Church End	15	1.1	0.7	4
South Oakleigh Road, Brunswick Park	4	3.4	1.7	9
Squires Lane, Finchley	8	4.2	0.5	3
Total	219	77.8	18.8	99

4.3

Age of building stock

The following sections look at the qualitative elements of each site based on the visual site survey undertaken. The results are presented in terms of hectares of employment land and all percentages refer to the total employment land that is currently in use or vacant.

Information on the approximate age of building stock was collected during the site survey. The broad age groups used to describe the age of buildings are: pre-war, 1950s to 1980s, and 1990s to present.

As shown in table 4-2, it is estimated that overall, approximately 29% of the building stock appears to have been built over the past 20 years, a further 69% was built between the 1950s and 1980s and only around 2% was built in the pre-war years.

Table 4-2: Approximate age of buildings stock

Approximate age of building	Proportion of all stock
Pre-war	2%
1950's – 1980's	69%
1990's onwards	29%

Source: Halcrow

4.4

Quality and condition of building stock

In terms of the quality of the Borough's employment sites and building stock, the vast majority of sites are ranked as average or better, with only 16% considered as being in poor condition. Around 47% of the borough's sites and building stock are considered as being in good condition and of good quality (**Table 4-3**).

According to the survey, this suggests that the majority of buildings across the borough are of a high enough quality to meet the current / future needs of businesses or to be capable of meeting them with some improvements and modifications. It should be noted however that quality by itself is not a guarantee that a site will meet business needs as factors such as location, size and tenure are also important.

Table 4-3: Quality of Barnet's employment sites and building stock

Quality	Percentage
Poor	17%
Average	47%
Good	37%

Source: Halcrow

4.5

Accessibility

Site accessibility refers to how accessible individual employment sites are by heavy goods vehicles (HGVs), light goods vehicles (LGVs) and other vehicles. It refers to the ease with which such vehicles can access the employment site curtilages. It does not necessarily reflect how accessible they are to the wider road network or how accessible they are by public transport.

Around half of employment sites (47%) have good accessibility as opposed to 15% that have poor accessibility (Table 4-4).

Table 4-4: Accessibility of employment sites

Accessibility	Percentage
Poor	15%
Average	38%
Good	47%

Source: Halcrow

4.6

Parking Provision

Along with site accessibility, parking provision can be a major factor affecting the overall quality and appeal of an employment site. Lack of sufficient on site parking provision can also lead to problems relating to excessive on street parking and increased levels of traffic congestion.

It is considered that across Barnet, the majority of sites (88%) appear to have adequate or good parking provision (Table 4-5). Only around 12% of sites have poor parking provision.

Table 4-5: Parking provision

Parking	Percentage
Poor	12%
Average	46%
Good	43%

Source: Halcrow

4.7

Potential conflicts with adjacent land uses

The operations or quality of uses on existing employment sites can be constrained by the uses found on adjacent sites. For example, an employment site adjacent to residential or commercial uses will be subject to limitations with regards to permitted noise and emission levels.

It is considered that the vast majority of employment sites (70%) do not appear to have significant conflicts with adjacent land uses. Overall only around 6% of employment sites are considered to be in direct conflict with adjacent land uses (Table 4-6).

Table 4-6: Potential conflict with adjacent land uses

Potential conflict	Percentage
Significant Conflict	6%
Some conflict	24%
No conflict	70%

Source: Halcrow

4.8

Flexibility

Flexibility refers to a site’s potential for in-situ expansion or extension (i.e. without expanding the boundaries of the site). The majority of sites (72%) appear to have good flexibility for redevelopment or expansion.

Table 4-7 Flexibility for in-situ redevelopment and/or expansion

Flexibility	Percentage
Poor Flexibility	7%
Average Flexibility	21%
Good Flexibility	72%

Source: Halcrow

4.9

Area Action Plan Land Supply Analysis

Mill Hill East Area Action Plan

The proposed Employment Hub Character Area sits towards the southern corner of the AAP site with access to the underground station and proposed local high street facilities. It builds on the existing business uses provided at Bittacy Business Centre and expands the employment area to provide opportunities for a broader range of workspaces and uses. In particular the Employment Hub will provide a range of B1 and B8 uses.

The additional 1 hectare of land is likely to provide approximately 4,000-5,000 square metres of B1 employment floorspace. A range of unit sizes of up to 600 sq m could be provided within the scheme to develop the small and medium enterprise (SME) base of the area.

The Colindale Area Action Plan - Draft Submission Document May 2009

The London Plan identifies an indicative employment capacity of an additional net 500 jobs. Colindale is not a major centre of employment but does benefit from some established and major employers. Job creation is central to economic and social sustainability and is a key priority for the council. Three of the sites identified by Halcrow's site surveys are located in Colindale, Colindale Business Centre, which amounts to about 1.6 hectares of employment land and Colindale Technology Park which amounts to about 0.9 hectares of employment land and Connaught Business Centre 0.9ha.

The majority of jobs to be generated are to be provided in new Met police facilities within the Colindale and Aerodrome Road Corridor of change and those at Beaufort Park. Additional jobs are provided through proposals for office use and a range of smaller uses including new educational facilities. New health facilities will be provided in the Colindale Avenue Corridor of Change, complemented by provided facilities at Grahame Park Estate.

Brent Cross / Cricklewood

The High Street will cross the A406 North Circular Road over a new bridge to a major new commercial district, located close to a new railway station. As a Brownfield site, with much improved public transport, the potential exists for a range of different buildings at greater densities than other places in the borough. Some of the buildings in the new commercial district will be high buildings. The new buildings will be of the highest architectural quality and built to the highest sustainability standards. They will act as physical, social and economic markers to the borough and London.

The employment potential of the area is expected to be significant with an estimated 20,000 jobs created in media, IT and construction, upon completion. The size and complexity of the development means that there will be a requirement for a wide range of services from landscape gardening and building maintenance to hospitality and catering. These jobs are expected to be filled by local people and for new people moving into the area. Training schemes will be offered to help local people access these opportunities.

4.10

Conclusion

The overall supply of employment land and premises in Barnet is generally of good quality. The vast majority of sites and buildings appear to have good flexibility and no major conflicts with adjacent land uses. Parking provision, accessibility and quality of buildings and sites is average or better in most cases.

However, supply of employment land is shrinking with more than a third of designated employment land surveyed having been converted to housing or other uses. In terms of vacancy levels, only a small proportion of employment sites were found vacant at the time of the survey (7% of the total employment land). This vacancy rate is reasonable, given that a certain vacancy rate (around 5% - 10%) is necessary to facilitate the efficient operation of the market.

5 Land Demand

5.1 *Introduction*

A key requirement of the employment land review is to assess the employment land needed to support the growth target of an area. There is also a need to test the employment land implications of other possible economic outcomes in the area between 2006 and 2026. These economic scenarios are presented as ‘what if’ situations in order to test the sensitivity of employment land demand in Barnet. Hence, the core economic scenario needs to appraise the implications for meeting Barnet’s aspiration of creating 17,000 new jobs between 2006 and 2016.

5.2 *Economic Demand Scenarios*

The following scenarios have been developed to assess future demand for employment land as part of this study:

- *Scenario 1 Business as Usual:* continuation of existing economic and sectoral growth trends, with an increase of around 11,000 jobs between 2006 and 2026;
- *Scenario 2 Planned Growth:* achieving a net gain of around 19,000 jobs between 2006 and 2026, identified in the *Outer London: Issues for the London Plan*;
- *Scenario 3 Aspirational Growth or core economic scenario:* achieving the London Borough of Barnet employment growth target of 17,000 jobs from 2006 to 2016 following sectoral growth trends resulting in a total net gain of almost 25,000 jobs between 2006 and 2026.

Forecasting methodology

Derived employment forecasts have been developed using Experian Business Strategies 2006 data as the baseline. The Experian forecasts form the basis of the first scenario and inform the second and third scenarios. Also utilised for the second scenario are employment growth rates detailed in *Outer London: Issues for the London Plan*⁹, which is a strategic document published by the Greater London Authority and aims to plan for the future growth of the Outer London boroughs. For each scenario, the forecast employment figures are used to derive gross and net floorspace using workspace employment densities and plot ratios. This is

⁹ Outer London: Issues for the London Plan, Greater London Authority, May 2007 found at:
http://www.london.gov.uk/mayor/strategies/sds/london_plan/outer_london_issues_lon_plan.pdf

expressed in sq m and hectares, and constitutes the land requirements for the identified use classes.

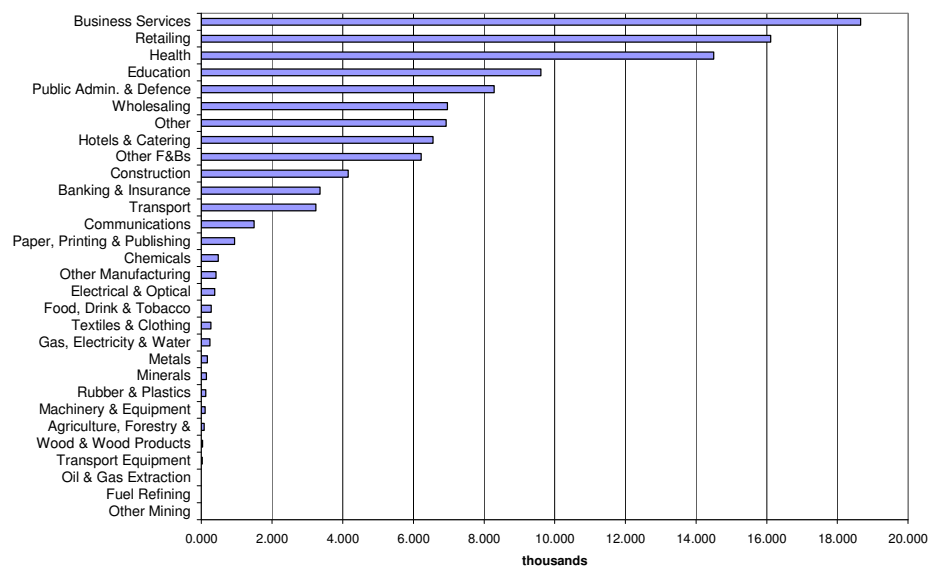
The North London Waste Plan considers the waste strategy for the North London area to 2020. At the time of drafting this report the Plan was at the Issues and Options stage although the consultation phase had ended. The NLW Plan requires 11.5 hectares in North London. Existing waste management sites need to be safeguarded for waste management. There are four in Barnet.

The following paragraphs outline the key assumptions used to develop the employment forecasts for each scenario and their respective results.

Scenario 1: Business as Usual

As stated earlier, the Experian Business Strategies baseline forecasts are adopted as the ‘Business as Usual’ scenario. The forecasts are developed at a pre-defined 30 sector level. These 30 sectors are similar to the broad one/two digit Standard Industrial Classifications¹⁰ (SICs).

Figure 5-1: Number of jobs by sector, 2007

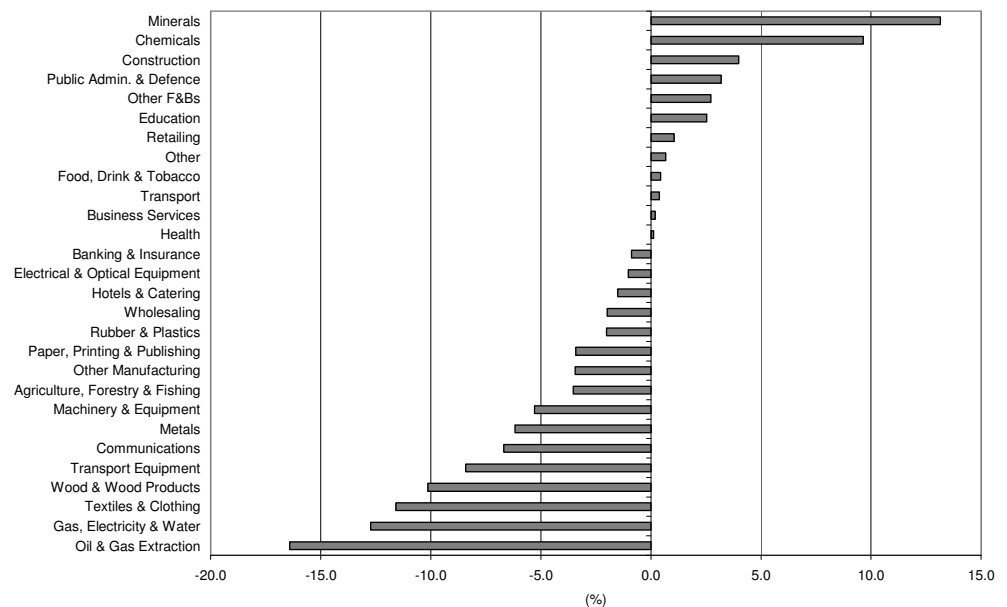


Source: Experian Business Strategies

¹⁰ The UK Standard Industrial Classification of economic activities is used to classify business establishments and other statistical units by the type of economic activities they are engaged in.

According to the Experian estimates Business services retail, health, education, public administration and defence and wholesale contributed the most to Barnet’s overall number of jobs in 2007. Traditional sectors such as mining, agriculture as well as most types of manufacturing had little contribution to Barnet’s employment.

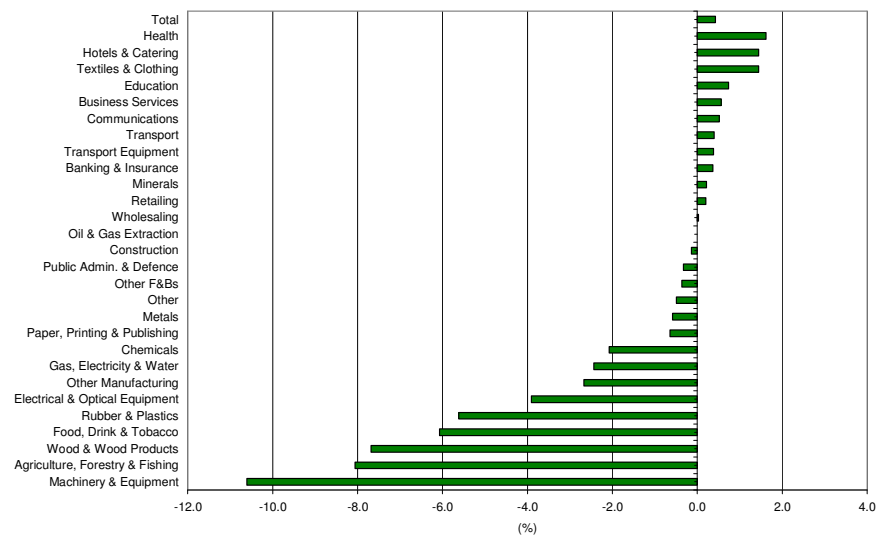
Figure 5-2: Average Job growth per annum by sector over the most recent economic cycle (1997-2007)



Source: Experian Business Strategies, Annual Business Inquiry and Halcrow.

Over the most recent economic cycle (1997-2007) Barnet’s jobs grew at an average of 0.3% per annum, as compared to 0.9% per annum over the previous economic cycle (1986-1997). Most of the growth was derived from sectors such as public administration and defence, construction, real estate, renting of machinery and equipment, education and retail. It should be noted that, though sectors such as minerals and chemicals appear to have had the highest average growth rates they start from a low base and thus this growth did not contribute significantly to Barnet’s overall number of jobs. Over the most recent economic cycle the fastest decline in jobs was experienced in utilities as well as in some sectors of manufacturing.

Figure 5-3: Forecast Change in Jobs by Sector, 2007-2026



Source: Experian Business Strategies, Annual Business Inquiry and Halcrow.

Looking forward, Barnet’s jobs are projected to grow at an average rate of 0.4% per annum. Growth is likely to be faster in sectors such as health, hotels and catering, textiles and clothing, education and business services. Over the next 20 years, sectors such as machinery & equipment, manufacturing of food, drinks and tobacco are projected to shrink further, continuing the trend of the recent years.

Assessing land demand for B use classes, while using such broad sector forecasts is less accurate. Hence, assuming that the Annual Business Inquiry 2006 sub-sector level breakdown is consistent over the projection period, the broad Experian Business Strategies defined sector forecasts were converted into three-digit SIC level estimates. Finally, three-digit SIC level estimates were converted into B use class employment projections. In simpler terms, the Experian Business Strategies 30 sector forecasts were mapped to the appropriate use classes in order to analyse the forecasts at a use class level.

It should be noted that this methodology assumes that the proportions of jobs across the sub-sectors of the economy are constant over time and does not account for any structural changes in sub-sectors in the economy. Such changes could potentially affect the results of this study; however it is not possible to be accounted for here due to the lack of available forecasts at such level of disaggregation.

Scenario 1: Business as Usual

The employment projections by B use class for the ‘Business as Usual’ scenario are presented in the table below.

Table 5-1: Employment Projections for ‘Business as Usual’ Scenario 1 (number of jobs)

Use Classes	2006	2009	2011	2016	2021	2026
B1	23,105	23,605	23,373	24,379	24,935	24,984
B2	3,462	3,225	3,074	2,845	2,674	2,400
B8	7,940	7,737	7,474	7,439	7,625	7,803
Non B Class	73,529	75,195	75,004	77,335	80,599	83,820
Total	108,035	109,762	108,925	111,998	115,833	119,007
Use Classes	Change 06-16	Change 16-26	Change 06-26	Change 06-26 %	Change 09-26	
B1	1,275	605	1,880	8%	6%	
B2	-617	-445	-1,062	-31%	-26%	
B8	-501	364	-137	-2%	1%	
Non B Class	3,806	6,485	10,291	14%	11%	
Total	3,963	7,009	10,972	10%	8%	

Source: Experian Business Strategies, Annual Business Inquiry and Halcrow

Between 2006 and 2026 there is a total net employment growth of approximately 10% (10,972 jobs). This implies a relatively slow average growth rate of 0.5% per annum for Barnet over this 20 year period. New jobs are forecast to be mainly in non-B Class uses (10,291 jobs; a 14% increase) and B1 (1,880 jobs; an 8% increase). Employment is forecast to decline by 2% (137 jobs) for B8 uses and by 31% (1,062 jobs) for B2 uses.

Scenario 2: Planned Growth

This scenario focuses on achieving employment growth levels and rates detailed in *Outer London: Issues for the London Plan*, published by the Mayor of London’s office in May 2007. It forecasts total employment growth of approximately 18,700 jobs between 2006 and 2026; in other words it implies an average growth rate in jobs of 0.7% per annum. Total employment is broken down into broad sectors of office, industrial and other employment. Due to differences in methodology the *Outer London: Issues for the London Plan* utilises a higher initial estimate of jobs for the Borough as compared to the Experian Business Strategies (EBS) estimates. For consistency, the planned growth scenario uses the same EBS estimates of jobs for 2006 and applies the London Plan growth rates to estimate future growth. Table 5-2 summarises the planned growth outcomes.

Table 5-2: Employment Projections for ‘Planned Growth’ Scenario 2

Use Classes	2006	2009	2011	2016	2021	2026
B1	23,105	24,457	25,358	27,611	29,864	32,118
B2	3,462	3,412	3,378	3,294	3,210	3,125
B8	7,940	7,824	7,747	7,554	7,361	7,168
Non B Class	73,529	74,605	75,322	77,116	78,909	80,702
Total	108,035	110,297	111,804	115,574	119,343	123,113
Use Classes	Change 06-16	Change 16-26	Change 06-26	Change 06-26 %	Change 09-26	
B1	4,506	4,506	9,013	39%	31%	
B2	-168	-168	-337	-10%	-8%	
B8	-386	-386	-772	-10%	-8%	
Non B Class	3,587	3,587	7,174	10%	8%	
Total	7,539	7,539	15,078	14%	12%	

Source: Experian Business Strategies, Annual Business Inquiry, Outer London: Issues for the London Plan (2007) and Halcrow

In this case, as in the previous scenario, between 2006 and 2026, non-B Class and B1 uses deliver most new jobs. However, in this scenario the largest increase (39% or 9,013 jobs) comes from B1 jobs and only about 10% (7,174) comes from non-B Class jobs. B2 and B8 classes exhibit a 10% decrease, declining by 337 jobs and 772 jobs respectively.

Scenario 3: Aspirational Growth

As stated earlier, this scenario focuses on achieving the employment growth target of 17,000 jobs between 2006 and 2016, taking into consideration that 35% of this growth is going to be in retail and the hospitality sector, 35% will be in public administration and 20% in financial and business services. The transformation of these forecasts to use class orders follows the same methodology as that of scenario 1. Since the borough’s targets reach to 2016, this scenario employs the Experian Business Strategies growth profile from 2016 to 2026, with around 24,500 jobs created over the 20 year period. This is shown in Table 5-3 below.

Table 5-3: Employment Projections for ‘Aspirational Growth’ Scenario 3

Use Classes	2006	2009	2011	2016	2021	2026
B1	23,105	24,747	25,842	28,579	29,230	29,288
B2	3,462	3,590	3,675	3,887	3,653	3,279
B8	7,940	8,332	8,594	9,249	9,480	9,701
Non B Class	73,529	76,466	78,425	83,321	86,838	90,308
Total	108,035	113,135	116,535	125,035	129,201	132,576

Use Classes	Change 06-16	Change 16-26	Change 06-26	Change 06-26 %	Change 09-26
B1	5,474	709	6,183	27%	18%
B2	425	-608	-183	-5%	-9%
B8	1,309	453	1,762	22%	16%
Non B Class	9,792	6,987	16,779	23%	18%
Total	17,000	7,541	24,541	23%	17%

Source: Experian Business Strategies, Annual Business Inquiry, and Halcrow

In the third scenario, as in the other two above, non-B Class and B1 uses deliver the most new jobs; however in this case B8 jobs also increase. More specifically, non-B Class jobs increase by 16,779 or 23%, B1 class jobs increase by 6,183 or 27% and B8 class jobs increase by 22% or 1,762 jobs, between 2006 and 2026. B2 jobs exhibit a 5% decrease, declining by 183 jobs.

5.3

Scenario Comparison

A comparison between the three scenarios is shown below in Table 5-4.

Table 5-4: Scenario Comparison Table (2006 – 2026)

Use Classes	Scenario 1	%	Scenario 2	%	Scenario 3	%
B1	1,880	8%	9,013	39%	6,183	27%
B2	-1,062	-31%	-337	-10%	-183	-5%
B8	-137	-2%	-772	-10%	1,762	22%
Non-B Class	10,291	14%	7,174	10%	16,779	23%
Total	10,972	10%	15,078	14%	24,541	23%

Source: EBS, Halcrow

In all three scenarios, most growth in employment is in either non-B Class or Class B1. Class B2 is in decline in all 3 scenarios and Class B8 jobs vary with the loss of almost 800 jobs in Scenario 2 to the growth of around 1,800 jobs in Scenario 3.

Consideration should be given to housing and population projections as these may constrain the uptake of jobs created. This is an indicative analysis as not all employment opportunities secured within Barnet are filled by Barnet residents. According to the 2001 Census, nearly 60,000 persons lived and worked in Barnet whereas over 86,000 worked outside the Borough with over 47,000 in-commuters. It is estimated that about half the new jobs forecasted will be filled by Barnet residents.

In terms of population and housing, *Outer London: Issues for the London Plan* provides forecasts for population and households from 2006 to 2026. These are shown below in Table 5.5, for population and households respectively.

Table 5-5: Population and Household Change, 2006 to 2026

Year	2006	2026	Change
Population:	328,900	381,000	52,100
Households	133,700	169,500	35,800

Source: Outer London: Issues for the London Plan

The London Plan (2008) identified a need for 20,550 additional homes between 2007/2008 and 2016/2017. A new housing land requirement will be identified within the Local Development Framework, informed in turn by the London Plan. However, the revised housing analysis of the London Plan adopts the higher end of the stated range of employment growth projections. Consequently, there should not be major issues related to a lack of housing land limiting employment creation opportunities.

5.4

Translating employment growth to employment land demand

The employment forecasts for the scenarios are converted to land demand by making assumptions on employment densities (the average floorspace in square metres per person in an occupied building) and plot ratios (the total gross floor area of a building (including walls and corridors) divided by the gross area of the industrial sites (the total area of the site up to the boundaries including any access roads and parking). These assumptions are set out below.

Employment Densities

Employment densities are widely used for planning purposes. The ODPM's *Guidance Note on Employment Land Reviews* states that there is no one correct figure and that ratios vary due to a number of factors such as employment sector, function, location, age of building and point of economic cycle. *The Guidance Note on Employment Land Reviews*, suggests that there are a limited number of large-scale surveys that have been undertaken; these include the study carried out for SERPLAN by Roger Tym & Partners (1997) and the more recent work done only in the South East (DTZ, 2004). Both studies provide average floorspace per worker ratios expressed in sq metres per worker. The findings of these reports are presented in the table below.

Table 5-6: Employment Densities

Use	Floorspace/Worker (m ²) RTP, 1997	Floorspace/Worker (m ²) DTZ Pinda, 2004
Offices	17.9	18.3
Industrial	31.8	38.2
Manufacturing	29.7	-
Warehousing (general)	40.1	-
Warehousing (with loading bays, e.g. DIY)	-	78.2

Source: ODPM, 2004

Another nationally acceptable source for employment densities is *the Employment Densities: A Full Guide* produced by Arup Research on behalf of English Partnerships. It presents gross internal floor space per worker for different use classes. This is shown in Table 5-7 below.

Table 5-7: Employment Densities: Arup Research

Use	Floor space per Worker (m ²)
<i>Industrial</i>	
General industry	34
Small industrial units	32
High tech / R & D	29
<i>Warehousing & Distribution</i>	
General warehousing	50
Large scale & high bay	80
Super store/retail warehousing	90
<i>Offices</i>	
General purpose built offices	19
Head quarters	22
Serviced Business Centre	20
Business Park	16
Science Park	32
Call centre	13

Source: Arup Economics and Planning, 2001

Taking into account the ODPM's Guidance Note on Employment Land Reviews, and previous experience conducting employment land studies around the country, Table 5-8 below presents the employment land densities adopted for the demand assessment.

Table 5-8: Adopted Employment Land Densities

Land Use	Adopted Employment Density
B1	20
B2	35
B8	45

Source: Halcrow

Plot ratios

Plot ratios are the total gross floor area of a building (including walls and corridors, etc.) divided by the gross area of industrial sites (total area of industrial sites up to site boundaries and includes access roads and parking spaces, etc.) for sites with buildings on them. Plot ratios are used to calculate the net employment land demand after employment densities or floor space worker ratios have been used to calculate the amount of floorspace required in the forecast.

Similar to employment densities, the adopted plot ratios used in this employment land study (Table 5-9) are a combination of the ODPM's *Employment Land Reviews: Guidance Note*, and experience of previous employment land studies conducted around the country.

Table 5-9: Adopted Employment Plot Ratios

Land Use	Adopted Plot Ratios
B1	100%
B2	50%
B8	50%

Source: Halcrow

Employment land demand Forecasts 2006 - 2026

The employment density discussed earlier has been used to convert jobs to floor space and then the respective plot ratio to convert floor space to need and demand for employment land. The same methodology is used for all three employment growth scenarios.

Scenario 1: Business as Usual

Under the 'Business as Usual' (BAU) scenario, if the current economic trends continue up to 2026, then the Barnet economy is projected to grow by some 4,000 jobs between 2006 and 2016, and 11,000 new jobs in total by 2026 (Table 5-1).

The BAU scenario will only see an additional employment land demand of less than 1 ha in Barnet between 2006 and 2016, and 1.2 ha from 2016 to 2026. This

scenario will see rising demand for B1 between 2006-2026 while demand for B2 and B8 floorspace will decline (Tables 5-9 and 5-10).

Table 5-10: ‘Business as Usual’ Changes in Employment Floorspace Forecasts in sq m

Land Use	2006-2016	2016-2026	2009-2026	2006-2026
B1	26,000	12,000	28,000	38,000
B2	-10,500	-8,000	-14,500	-18,500
B8	-11,000	8,000	1,500	-3,000
Total	4,500	12,000	15,000	16,500

Source: Halcrow

Table 5-11: ‘Business as Usual’ Changes in Employment Land Forecasts in ha

Land Use	% Change			
	2006-2016	2016-2026	2006-2026	2009-2026
B1	2.6	1.2	3.8	2.8
B2	-1.1	-0.8	-1.9	-1.5
B8	-1.1	0.8	-0.3	0.1
Total	0.5	1.2	1.7	1.5

Source: Halcrow

Scenario 2: Planned Growth

A moderate growth scenario is provided by the ‘Planned Growth’ scenario based on the Outer London: Issues for the London Plan. Under this scenario, the area’s economy is projected to grow by some 7,500 jobs between 2006 and 2016, with a total of nearly 15,000 new jobs by 2026. This scenario will see an additional land demand of almost 8 ha by 2016 and a total of around 16 ha by 2026 (Table 5-13).

In this scenario Barnet will see rising demand for B1 and reduced demand for B2 and B8 land and floorspace between 2006 and 2026. More specifically, this scenario forecasts a decline in the requirement for B2 and B8 land and floorspace, of some 0.6 ha and 1.7 ha respectively and an increase in B1 land and floorspace by 18 ha. It should be noted that scenario 2 is based on growth forecasts from the Outer London: Issues for the London Plan and the broad sectors of office, industrial and other employment associated with it.

**Table 5-12: ‘Planned Growth’ Changes in Employment Floorspace
Forecasts in sq m**

Land Use	2006-2016	2016-2026	2009-2026	2006-2026
B1	90,000	90,000	153,000	180,000
B2	-3,000	-3,000	-5,000	-6,000
B8	-8,500	-8,500	-14,500	-17,000
Total	78,500	78,500	133,500	157,000

Source: Halcrow

Table 5-13: ‘Planned Growth’ Changes in Employment Land Forecasts in ha

Land Use	%Change			
	2006-2016	2016-2026	2006-2026	2009-2026
B1	9.0	9.0	18.0	15.3
B2	-0.3	-0.3	-0.6	-0.5
B8	-0.9	-0.8	-1.7	-1.5
Total	7.9	7.9	15.7	13.4

Source: Halcrow

Scenario 3: Aspirational Growth

Under the third and core study scenario of ‘Aspirational Growth’, 17,000 jobs would be created between 2006 and 2016, with a total of approximately 24,500 new jobs created by 2026. This scenario will see an additional land demand of around 17 ha of employment land for all B use classes by 2016 and a total land demand of almost 19 ha by 2026.

In particular, the forecasts show that Barnet will see rising demand for B1 and B8 land and floorspace over the coming years while demand for B2 land and floorspace will decline slightly. The demand for B1 land in particular is forecast to increase by around 15 hectares by 2026 (Table 5-15).

**Table 5-14: ‘Aspirational Growth’ Changes in Employment Floorspace
Forecasts in sq m**

Land Use	2006-2016	2016-2026	2009-2026	2006-2026
B1	110,000	14,000	91,000	124,000
B2	7,500	-10,500	-5,500	-3,000
B8	29,500	10,500	31,000	40,000
Total	147,000	14,000	116,500	161,000

Source: Halcrow

Table 5-15: ‘Aspirational Growth’ Changes in Employment Land Forecasts in ha

Land Use	Change			
	2006-2016	2016-2026	2006-2026	2009-2026
B1	13.6	1.5	15.1	11.0
B2	0.8	-1.1	-0.3	-0.6
B8	2.9	1.0	3.9	3.0
Total	17.2	1.5	18.7	13.5

Source: Halcrow

North London Waste Plan

The emerging North London Waste Plan (NLWP) is a statutory Development Plan Document that provides the legal planning policy framework on waste facilities once the UDP is replaced. The NLWP covers the boroughs of Barnet, Camden, Enfield, Hackney, Haringey, Islington and Waltham Forest and is required by the London Plan to help London to become 85% self-sufficient in waste management by 2020. To ensure that London achieves self-sufficiency, each borough has been asked to identify sites to deal with a proportion of London’s total waste that has been allocated to each borough in what is known as the apportionment. The NLWP needs to identify sufficient sites to deal with the waste apportionment and to establish a planning policy framework for the consideration of waste proposals.

The London Plan requires that existing waste management sites are safeguarded for waste management use. New waste management sites will be identified at the Preferred Options stage of the NLWP in autumn 2009.

5.5

Conclusions

Land demand in Barnet is forecast to increase by around 1.7 hectares, under the business as usual scenario, 16 hectares under the planned growth scenario and 19 hectares under the aspirational growth scenario between 2006 and 2026. However, recognising the employment growth potential already identified in Barnet, if jobs targets are to be achieved, land demand will increase by around 19 hectares. The above figures represent the minimum additional land requirements to 2026. For example, any loss of employment land to other uses would increase the Borough’s additional employment land requirements. In addition, the North London Waste Plan might pose additional strains on the borough’s land demand and result in an increase in the borough’s employment land requirements.

Demand for B1 and B8 uses is likely to increase between 2006 and 2026. In comparison, the demand for B2 land appears to be declining. Hence, estates in the borough with predominantly industrial (B2) land use should be carefully assessed

to test their appropriateness for meeting future demand requirements. Furthermore, any employment land identified to be unsuitable to meet the future requirements and unsuitable and unviable for redevelopment should be considered for release as per the traffic light multi-criteria assessment in Chapter 6.

If the jobs target and aspirations of the London Borough of Barnet are to be realised, it is considered that scenario 3, with a requirement of 19 hectares (15 hectares B1 and 4 hectares B8 with no change in B2), is the optimum scenario.

6 Quality of Employment Land

6.1

Introduction

This section provides a qualitative assessment of the borough's existing employment land stock. The assessment was undertaken at an estate level, where an estate is defined as a recognised cluster of sites or areas (recognisable in market and employment land terms). The key consideration in assessing future land needs and making recommendations to support the LDF is a view on the quantity of employment land that is 'fit for future' purpose.

The appraisal has been undertaken in accordance with CLG guidance and uses a *traffic light* approach to identify estates that are:

- a priority for retention as high quality employment sites (Green);
- those where employment uses remain viable but intervention in the future may be required to retain employment uses (Amber); and
- those that could be considered for release for alternative use (Red).

This was informed by site visits undertaken by Halcrow and Savills and the analysis of the site survey database.

It should be noted that "Red" sites should not be considered as sites that should be released for alternative uses straight away. They are sites that should be considered for release provided that their fitness for purpose, sustainability and marketability do not improve and that sufficient new employment allocations are secured to ensure no overall loss to the borough's supply of employment land.

The assessment criteria used are summarised in **Table 6-1** below and provide a balanced, qualitative assessment between the market and planning perspective of each estate.

Table 6-1: Estate Appraisal Criteria

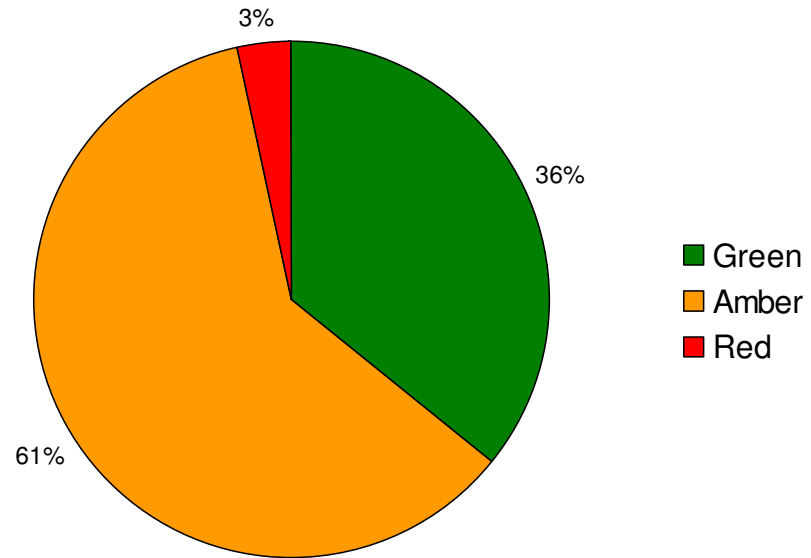
<p>Fitness for purpose</p> <ul style="list-style-type: none"> • Is the estate fit for its current use? • What is the demand/vacancy rate? • What is the quality of the land like? • Does the estate have good accessibility and parking provision?
<p>Sustainability</p> <ul style="list-style-type: none"> • Is the estate sustainable for its existing use? • Is there any conflict with adjacent land uses? • Does the estate have good accessibility and parking provision?
<p>Marketability</p> <ul style="list-style-type: none"> • Is the estate marketable to meet future employment land needs? • Is the estate in a good location? • Is the estate visible? • Is the estate flexible? • Is the general quality of environment good? • Is there any conflict with adjacent land uses? • Is the market perception positive?

6.2

Analysis

The results show that approximately 36% of the employment land and premises stock was appraised as “Green” – land that should be retained for employment uses. A further 61% was rated as “Amber” and the remaining 3% was assessed as “Red”.

Figure 6-1: Traffic light assessment



Source: Halcrow, Savills

Table 6-2: Traffic light assessment by employment estate

Estate name	Size (ha)	Traffic light assessment
Bittacy Hill	0.9	Green
Colindale Business Centre	1.0	Green
Colindale Technology Park	0.3	Green
Garrick Industrial Centre	2.3	Green
Granard Business Centre	0.2	Green
Mill Hill East Industrial Estate	0.7	Green
Regents Park Road employment cluster	0.4	Green
Squires Lane	0.5	Green
Brunswick Business Park	1.8	Amber
Bunns Lane Works	0.5	Amber
Connaught Business Centre	0.5	Amber
Finchley Industrial Estate	0.6	Amber
Grenville Place	1.6	Amber
Hadley Manor Trading Estate	0.4	Amber
Lancaster Road Industrial Estate	0.7	Amber
North London Business Park	2.6	Amber

Estate name	Size (ha)	Traffic light assessment
Queens Road Industrial Estate	0.4	Amber
Redrose Trading Centre	0.1	Amber
Oakleigh Road South	1.7	Amber
Falkland Road Industrial Estate	0.3	Red
Pricklers Hill	0.9	Red

Source: Halcrow, Savills

6.3

Site assessment matrices and scores

Bittacy Hill

Assessment: Green

This site sits within the Mill Hill Area Action Plan which proposed its retention and expansion. Furthermore, the borough's Unitary Development Plan considers this site as a primary employment site, which means that planning permissions for proposed redevelopment or change of use will not be granted. The employment space at Bittacy Hill is made up of small workshop units, with the majority of the site occupied by the council depot. High scores were achieved across all categories, although the site has poor internal access and layout with limited parking. Issues with internal access and layout could be resolved through redevelopment. The site offers reasonable potential for redevelopment as it is boarded by residential on one side only. The site appeared to be fully occupied at the time of survey, suggesting strong business demand. It is recommended that it is safeguarded for employment use.

Outline permission was granted in 1998 ref. W/01141/N for redevelopment of the site for offices, care home, sheltered housing, retail, hotel, and pub/restaurant and residential uses. The area action plan proposed an additional 1ha of space for new employment uses adjacent to Bittacy Business centre. Policy MHE3: New employment opportunities to meet the target of 500 new and replacement jobs on site.

Colindale Business Centre

Assessment: Green

The site consists of relatively good quality office units and is well located in terms of motorway and public transport access as it is close to both the M1 and Colindale tube station. The site sits within the boundaries of the Colindale Area Action Plan and was recommended for safeguarding. Furthermore, the borough's Unitary Development Plan considers this site as a primary employment site, which means that planning permissions for proposed redevelopment or change of use will not be granted. It provides good quality units and scores well across all categories. There is potential to redevelop and include the adjacent site which

currently accommodates a vacant warehouse unit. This would further enhance the quality of provision. The site appeared to be well occupied at the time of survey, suggesting strong business demand. It is recommended that it is safeguarded for employment use.

Colindale Technology Park

Assessment: Green

This centre scored well across all categories with good quality office buildings and close proximity to Colindale tube station. However, in terms of potential redevelopment it is relatively constrained with residential on three sides. This limits the kind of B uses that can be accommodated on the site. The site appeared to be fully occupied at the time of survey, suggesting strong business demand. The site sits within the boundaries of the Colindale Area Action Plan and is recommended for safeguarding. Furthermore, the borough's Unitary Development Plan considers this site as a primary employment site, which means that planning permissions for proposed redevelopment or change of use will not be granted. It is recommended that it is safeguarded for employment use.

Garrick Industrial Centre

Assessment: Green

Although this industrial centre has poor access road, low visibility and lack of apparent branding it comprises a cluster of good quality office and B8 property dating from the 1980's/90's. It is also close to both the M1 and North Circular. A large proportion of the site is occupied by one company, Angels the costumers, with the rear of the estate in multiple occupations. The site scored very well across most categories and as it is located in a largely commercial/industrial area redevelopment potential is high. Vacancy rates were low at the time of survey suggesting good business demand. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted. It is recommended that it is safeguarded for employment use.

Granard Business Centre

Assessment: Green

Granard Business Centre consists of office only property largely in multiple occupation and scored well across most categories. The site is located in close proximity to the A1, has good visibility, site access and quality of office stock. Additionally, it is not edged by residential use. The site is limited by Mill Hill Broadway Station to the back which limits the potential of the site going forward in terms of restriction of floorspace. The site appeared to be fully occupied at the time of survey, suggesting strong business demand. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such,

planning permissions for proposed redevelopment or change of use will not be granted. It is recommended that it is safeguarded for employment use.

Mill Hill East Industrial Estate

Assessment: Green

Mill Hill Industrial Estate is located directly adjacent to the M1 and is in relatively close proximity to Mill Hill Broadway station. It is located adjacent to Bunns Lane Works. While the quality of existing stock on the site is poor and it has limited visibility from the main access point there is good potential for redevelopment going forward to improve the stock as it is only bounded by residential on one side. This would be further enhanced if it were to be redeveloped in conjunction with Bunns Lane Works. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted. It is recommended that it is safeguarded for employment use.

Regents Park Road Employment Cluster

Assessment: Green

This site is almost entirely occupied, scores well in terms of quality of buildings and parking provision and does not seem to create conflicts with adjacent uses. The estate does not score very highly in terms of accessibility but since almost all occupants are offices this does not seem to pose a serious problem. Furthermore, it is in close proximity to the North Circular and the Finchley Central tube station. It is recommended that the estate is safeguarded for employment use.

Squires Lane (Pentland International HQ)

Assessment: Green

Due to the quality of the buildings and proximity to the North Circular and tube station this estate scored highly across all categories. The site consists of Pentland's existing HQ offices and the recently completed buildings on the adjacent site. This site is unlikely to be available to the wider market unless it is vacated by Pentland at some point in the future. It is recommended that it is safeguarded for employment use.

Brunswick Industrial Park

Assessment: Amber

This industrial estate scored well across all categories and is located in close proximity to the North London Business Park. Properties on the park consisted largely of B8 units with associated office space. The size of the units may be suitable for occupants who require 24 hours access. However, it is surrounded by residential uses on all sides and therefore this kind of activity would conflict with the residential use. This limits the potential of the site going forward and subject to

securing a better quality space for the current B8 uses there is potential to release this site for housing during the plan period. However, this site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Bunns Lane Works

Assessment: Amber

Bunns Lane Works is located immediately adjacent to Mill Hill Industrial Estate and enjoys good access to the motorway network being directly adjacent to the M1 and in close proximity to the Mill Hill Broadway British Rail. The existing quality of building stock is poor and it is constrained in terms of massing potential. However potential redevelopment would enhance the site particularly if it were to be redeveloped in conjunction with Mill Hill Industrial Estate. It should be mentioned that this site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Connaught Business Centre

Assessment: Amber

The Connaught Business Centre enjoys good access to the motorway network via the M1 at Brent Cross and has relatively good access to public transport and local facilities. However it has poor parking provision although with 100% occupancy this does not appear to have impacted on the attractiveness of the site. There is potential to redevelop and if the adjacent commercial site was incorporated into the site this potential would be further enhanced. This site however, is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Finchley Industrial Estate

Assessment: Amber

While this estate is well maintained and scored well across all categories it has a low occupancy. The site is about 0.3 miles away from Woodside Park Underground station but it is relative far from the A1 and M1. Poor redevelopment potential due to massing restrictions, limit the potential of the site in the future. However, this site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Grenville Place

Assessment: Amber

This is a constrained site consisting of offices concentrated into two buildings. The office property on the site is of a relatively good quality and the site enjoys good access to local amenities and is within walking distance of Mill Hill Broadway station. However, its lack of parking, difficult access and its location within a residential area limits its potential uses and its redevelopment potential. It should be mentioned that this site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Hadley Manor Trading Estate

Assessment: Amber

The trading estate should be considered in the context of the redevelopment of the Barnet Trading Estate, planning reference N14947B/06 include the demolition of all buildings and the erection of 9 buildings to provide a total of 121 self contained residential units, and erection of 2 buildings to provide Class B1 commercial floor space and erection of 1 building to provide Class B2/B1 commercial floor space. There is partial redevelopment of Hadley Green Garage including demolition of an existing building and erection of 1 building to provide Class B2/B1 commercial floor space. A new site access is created from Victors Way and Park Road and there is the provision of associated off-street parking and landscaping. The two recently constructed buildings on the Hadley Green Garage site will remain, the existing 1960's building would be demolished and replaced with a two storey building. This building would also be used by Hadley Green Garage.

The existing buildings on the trading estate and the unit behind 15 Park Road would be redeveloped to provide three new commercial buildings (units 4 and 5 for B1 use and unit 6 as a replacement B2 use) extending north to south on the western edge of the site adjoining the Hadley Green Garage site. A total of 3,347 sq.m of employment floor space would be provided by these buildings. Units 4 and 5 would be accessed via the existing Hadley Green Garage access off Victors Way and the access to proposed unit 6 would remain as existing, off Park Road.

Lancaster Road Estate

Assessment: Amber

This small trading estate is directly adjacent to Redrose Trading Estate and offers good quality space with excellent access to public transport (New Barnet train station is within 5 minute walk) and local amenities. However it is on a constrained site surrounded by residential on nearly all sides and access to the site is via narrow residential streets. Redevelopment of the site is also limited due to the residential nature of the area in which it is located and the size of the site. This site is

considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

North London Business Park

Assessment: Amber

Currently the majority of this business park is in B1/D2 use and it scores well across all the categories with high quality buildings, branding, access and parking provision. However the site is not located close to a rail/tube station and is within close proximity to residential areas. This limits future redevelopment due to potential disturbance to residents. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Queens Road Industrial Estate

Assessment: Amber

The Queens Road Industrial Estate offers a mix of business space from small scale office to workshops. The estate offers functional, mid quality business space in a pleasant environment. The site enjoys good access to the M25 via the A1 but there are no local amenities or public transport access within the immediate vicinity. The potential for redevelopment is also hampered by its location within a residential area. With a reasonable level of occupancy the site should not be considered for release within the current planning cycle but due to the limited potential going forward it could be a candidate for release in the future. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Redrose Trading Estate

Assessment: Amber

This small trading estate is directly adjacent to Lancaster Road Estate and offers good quality space. The site enjoys excellent access to public transport and local amenities, all of which are within 5 minutes walk. However it has poor access down a narrow residential street and poor internal access. While the site is currently of good quality it only has 60% occupancy and limited redevelopment potential going forward. The site should not be considered for release within the current planning cycle but due to the limited potential going forward it could be a candidate for release in the future.

South Oakleigh Road

Assessment: Amber

Located between North London Business Park Business Park and Brunswick Industrial Estate, this is a triangle site dominated by builders' yards. The site is of poor quality but has good access by road and public transport. Due to the constrained nature of the site there is limited redevelopment potential in terms of massing as it is a narrow triangle site bounded by the train line on one side and Oakleigh Road South on the other. However, due to its location the potential to release the site for other uses is limited.

Falkland Industrial Estate

Assessment: Red

This site is almost entirely enclosed by residential on all sides with a small entrance point onto Falkland Road. It has limited accessibility and poor parking provision. As a result the site scores poorly in terms of fitness for purpose and marketability and is unlikely to appeal to any B8 type occupier due to the constrained access of the site and its location in a residential area. It has very limited redevelopment potential and should be considered for release over the planning period provided that a better quality new site can be allocated for employment use. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

Pricklers Hill

Assessment: Red

Pricklers Hill is a small site characterised by work units bounded on three sides by residential. Its location is directly on Pricklers Hill. Access onto the site is also constrained. This, the generally low quality of space on offer and limited potential for redevelopment for employment use means that it scores poorly in terms of marketability. The site is also relatively isolated in that access to local amenities and train/tube network is limited. Subject to the allocation of a better quality employment site it should be considered for release over the planning period. This site is considered as a primary employment site under the borough's Unitary Development Plan. As such, planning permissions for proposed redevelopment or change of use will not be granted.

6.4

Conclusions

The above assessment of existing sites was based on a market perspective as well as qualitative perspective taking into account indicators such as age, quality, parking provision, accessibility etc. This indicates whether they are marketable ("what the tenant wants"), presenting an attractive option for potential occupiers,

and are they fit for purpose in their present state and if they were to be redeveloped.

Overall the estates that scored highly were the ones where the quality of the buildings and environment was good, they had good parking provision and were in close proximity to the North Circular and M1 or other road networks. Those that scored poorly tended to be constrained sites in predominately residential areas. Out of the 24 industrial estates located in Barnet most were rated as green or amber with only three estates rated as red.

7 Market Balance

7.1

Future requirements

As shown in earlier stages of this report for 2009-2026, Barnet will need between 1.5-13.5 additional hectares in order to accommodate future employment land requirements. The forecasts for future employment land requirement vary significantly between scenario 1 of this report and the other two scenarios. More specifically, assuming business as usual, i.e. assuming no additional intervention to boost the local economy, Barnet will need only about 1.5 ha to accommodate future demand. However, if assuming that Barnet realises the targets of the London Plan the borough will need 13.4 additional hectares and if it goes even further to realise its own targets, the borough will need an additional 13.5 ha.

In addition, consideration should be given to the additional requirements arising from the employment land that has scored poorly on the multi-criteria assessment, as well as the land requirements posed by the North London Waste Plan. An extra 0.7 hectares of employment land will be lost in the future if the council adopts the recommendations to release some poor quality employment land. This would increase the employment land requirements to 2.2 – 14.2 hectares. For the moment, the North London Waste Plan is expected to pose an additional requirement of 2.5 ha of land that might be sourced from change of use of currently existing employment land. Since the options paper is not yet finalised it is still uncertain how much the North London Waste Plan will change the employment land requirements of the borough, however, based on all the above, it can be assumed that at least 2.2 ha will be needed under business as usual and at least 14.2 ha will be needed if Barnet is to achieve its targets for a more dynamic local economy.

Based on the above (and taking into consideration that there are already planning permissions for 3.5 ha of additional employment land), the likely future employment land needs for each employment growth scenario are shown below.

Table 7.1-Future Additional Employment Land Requirements (ha)

	Scenario 1 - Business as Usual	Scenario 2 - Planned Growth	Scenario 3 - Aspirational Growth
Future Land Requirements (2009-2026)	1.5	13.4	13.5
Including employment land recommended for release (0.7 ha)	2.2	14.1	14.2
Excluding employment land in the pipeline (3.5 ha)	-1.3	10.6	10.7

Source: Halcrow

Based on the business as usual scenario which forecasts an additional 1.5 hectares of employment land need to 2026, employment land requirements will be satisfied entirely by the current planning permissions and there will be a further excess of around 1 hectare of employment land.

The planned growth scenario and the aspirational growth scenario indicate similar requirements for employment land. According to these two scenarios and taking the current planning permissions into consideration, there will be an additional requirement of around 11 hectares of employment land.

It is recommended that the loss of employment sites is monitored on an annual basis and the borough's employment land requirements are regularly reviewed to ensure an up to date and robust understanding of employment land needs.

7.2

Stakeholder survey results

In January 2009 an online survey was set up and 159 consultation invitation letters were sent to key stakeholders to express their views on the borough's supply and demand for employment land premises. In addition, stakeholders were invited to a consultation workshop on 22 January 2009. The views of the stakeholders are summarised below.

The survey received 14 responses, all of them from private sector companies. The most common activities of the respondents were private developers, planning consultancies and construction firms. Of those organisations surveyed, response rates varied from question to question.

Almost all local businesses stated that their current premises met their needs and most of them would not consider relocating outside Barnet.

Most organisations were pessimistic in their predictions for demand in employment land for the next couple of years which can be partly explained by the current economic downturn. However, even over the longer term most respondents consider that only demand for warehouses will increase with demand for offices and industrial space staying constant.

Most of the respondents considered accessibility and location the main advantages of Barnet as an employment location. Quality of employment premises and affordability were considered as Barnet's main disadvantages.

Stakeholders were also asked whether Barnet needs more employment land but responses were not clear with most organisations responding they did not know and the rest evenly split between yes and no.

The results of the stakeholder consultation indicate that the existing employment land provision mostly meets the needs of the local economy. The issues that should be considered are improving the quality and affordability of employment land. A more recent survey was undertaken by North London Business¹¹ and results were published in July 2009.

7.3

Recommendations

Barnet, on the whole, is not a major regional business location and this is reflected in the nature and quality of the employment space found in the borough. Despite this the majority of the sites do fulfil a particular role within the local economy. However, from a property perspective, as presented in the benchmarking, there are better performing sites. If necessary, it would be advisable to release some of the lower scoring sites. There are two clear 'poor' sites from the benchmarking analysis. These are the Falkland Road Industrial Estate and Pricklers Hill.

Below are our recommendations for those existing estates/sites that should be safeguarded from redevelopment for other uses, those which would benefit from some level of redevelopment/ refurbishment, and those which we believe could be released. We also highlight those potential new allocations which present the best opportunity of being brought forward by the private sector.

7.4

Recommendations for safeguarding

Squires Lane, North London Business Park, Garrick Industrial Centre, Brunswick Industrial Park, Bittacy Hill, and Granard Business Park are clear candidates for safeguarding due to their marketability to potential tenants, whether this is based on their location and/or quality of the space on offer.

¹¹ For more information refer to: www.northlondonbusiness.com

The dominance of small occupiers in Barnet means that there is a strong case to safeguard those sites which would appear to be meeting local demand and include some of the mid ranking sites. These include Colindale Technology Park, Colindale Business Centre, Mill Hill Industrial Estate, Finchley Industrial Estate and Connaught Business Centre. There is a potential argument to safeguard Hadley Manor Trading Estate and Grenville Place as they would appear to be popular with current occupiers. We would note that the residential nature of the areas in which these sites are located and their restricted site access may mean that they should not be safeguarded on a long-term basis.

A further estate that is recommended for safeguarding is British Aluminium, Alum Way, N20. This site was formerly used by Aluminium works.

7.5

Recommendations for refurbishment and/or redevelopment for employment use

There are a number of cases on the list above where some level of refurbishment or redevelopment would be recommended in order to improve marketability.

There are proposals for new employment uses adjacent to Bittacy Business Centre as part of the Area Action Plan. A wider variety of units, possibly with some small scale office provision, better on-site layout and increased car parking would improve its marketability score as it already enjoys good motorway and public transport access.

Garrick Industrial Estate is already well positioned for access to the North Circular and M1 but some refurbishment of the site mainly that of its principle access road will help to improve its perception in the market. While Brunswick Industrial Park currently offers relatively good quality space there may be scope for some level of refurbishment/redevelopment. At present, the size of the B8 units on offer and the residential nature of its surrounding area mean that it has struggled to attract occupiers whose business would conflict with residential uses (i.e. 24hr access to units). There may be scope to redevelop part of the site in order to provide smaller, flexible business units to meet local indigenous demand.

7.6

Recommendations for release

While many of the poorer rated sites could be redeveloped for other uses, those which we would recommend for release includes the bottom two ranked sites, Falkland Road and Pricklers Hill.

Release of these sites is primarily based on the fact that they are small sites, with poor quality stock and access with limited parking. Their positioning in residential

areas also means that they offer limited potential for redevelopment for employment use.

Falkland Road's recommended release is based on the fact that it is a constrained site almost completely surrounded by residential. Access to the site is via narrow residential streets and even access directly on to the site is restricted. While the site would appear to be popular with occupiers, the age and quality of the stock raises concerns regarding the long term life of the site as a business location. As already described, the nature of the site offers little potential for redevelopment as an employment location.

The recommendation to release Pricklers Hill is also based on the poor quality of the space on the site, although it does meet demand from lower end users such as car repairs/services. The proximity of residential uses restricts redevelopment potential for the site as does its poor access to the motorway network, public transport and local amenities.

7.7

Recommendations for potential new allocations

The former Barnet Trading Estate site has already been earmarked for mixed use development. The original Estate comprised 2,753sq m of redundant industrial buildings plus two dilapidated buildings to the east that were destroyed by fire over 30 years ago. Outline planning permission relates to the redevelopment of Barnet Trading Estate and 45-47 Park Road including demolition of all buildings and erection of 9 buildings to provide a total of 121 self-contained residential units, and erection of 2 buildings to provide Class B1 commercial floorspace and erection of 1 building to provide Class B2/B1 commercial floorspace. The partial redevelopment of Hadley Green Garage includes demolition of an existing building and erection of 1 building to provide Class B2/B1 commercial floorspace. A new site access is to be created from Victors Way and Park Road. Provision of associated off-street parking and landscaping (planning reference N14947B/06).The new commercial floorspace includes some flexible B1 space and workshops that meets the demand from small local businesses.

7.8

Employment Development Pipeline

Research undertaken by Roger Tym and Partners as part of the draft report of the Town Centre Floorspace Needs Assessment, shows that there are already around 3 hectares of office floorspace and another 0.6 hectares of industrial and warehouse floorspace underway. Table 7-1 shows the size and location of this development pipeline.

Table 7-1 Employment development pipeline 2009

Site Name	Site Address	Completion date	B1 Floorspace	B2/B8 Floorspace	Land Use
	221 Golders Green Road	Not started	2,845	-	Mixed
Barnet Trading Estate	Park Road	Demolition has taken place - building not started	2,715	980	Mixed
Meadow Works	Great North Road	Not started	2,664	-	Mixed
	135-177 Granville Road	Not started - will be completed in 2011/2012	2,635	-	Office
Tudor House, Off	Llanvanor Road	Not started	2,500	-	Office
	46 Watford Way	Not started	2,111	-	Mixed
Land To R/O 2-24	Lytton Road	Not started	1,792	20	Mixed
Car Park At Rear Of 314	Regents Park Road	Not started	1,379	-	Office
Land Rear Of 30-100	Colindeep Lane	Not started	1,253	-	Office
	30&32 Friern Park	Not started	1,203	-	Office
Old Laundry Works	Falkland Road	Not started	1,167	-	Office
	182 Victoria Road	Not started	1,100	-	Office
	2 Lyttelton Road	Not started	1,065	-	Mixed
	779 - 783 Finchley Road	Commencement 13/12/07	1,000	-	Office
Former Royal Oak Public House, 1117	Finchley Road	Commencement 24/7/08	901	-	Mixed
Green Point	Edgware Road	Not started	569	-	Mixed
Former Raf East Camp Site	Aerodrome Road	Outline application	465	-	Mixed
Blocks C1 And C2 At Former Raf East Camp Site	Aerodrome Road	Not started	250	-	Mixed
Brunswick Industrial Estate	Brunswick Way	Not started	-	3,895	Industrial
Units 12 &13 Garrick Road Industrial Estate	Irving Way	Completed 20/07/2006	-	1,340	Industrial
Former Raf East Camp Site	Aerodrome Road	Outline application	465	-	Mixed

Source: Roger Tym and Partners

8 Conclusions

8.1 *Existing supply*

Barnet is not a prime office or industrial location due to its predominantly suburban nature. Its employment stock comprises mostly of smaller units catering to the needs of local businesses rather than attracting larger ‘in-coming’ occupiers.

Although the borough is placed relatively close to Central London and has a good access to the underground network, aspirations for it to become a major office location have not materialised. Office locations around the borough include areas such as A1000 through Whetstone and Finchley and the town centres.

The characteristics of industrial property are similar to those of office space. Industrial property tends to satisfy local demand for industrial space rather than attracting any significant numbers of large “in-coming” occupiers. In line with the needs of local demand, industrial floorspace is mostly small. Going forward, land requirements are expected to continue to stem mostly from local demand.

Barnet has around 72 ha of gross employment land and 19 ha of net employment land. The majority of employment land is of good or average quality, scoring well in terms of age, image, accessibility, parking provision, flexibility etc. There also appears to be a good mix of B1, B2 and B8 employment sites although non-B class uses (such as housing) seem to have taken up a significant proportion of employment designated land.

In terms of vacancies, about 7% of all employment designated land appears to be vacant. This is the normal level considered necessary for the efficient operation of the market. It also suggests that supply and demand in the borough are in general equilibrium.

8.2 *Future demand*

The future demand for employment land and premises in the borough is directly linked to employment growth. At the time of writing and due to the prevailing economic conditions there is great uncertainty on future job growth. This study has examined three main employment growth scenarios covering both low and high employment projections.

Depending on which scenario is used, employment land requirements in Barnet are forecast to increase by 1.5 to 13.5 ha between 2009 and 2026. More specifically, under business as usual and assuming no more initiative to stimulate the local

economy, there will be an additional requirement of 1.5 ha of employment land. In order for Barnet to realise the target set by the London Plan for close to 19,000 additional jobs by 2026, the borough will need an additional 13.4 ha. Finally, if Barnet is to realise its own aspirations to create 17,000 additional jobs across the borough, there will be an additional requirement for 13.5 ha of employment land to 2026.

Employment growth (and therefore land demand) is forecast to come mainly from office uses (B1) while manufacturing uses (B2) are forecast to decline further.

8.3

Market balance

The majority of existing employment sites are fit for purpose and should be safeguarded for employment use (although in some cases some action may be required in terms of refurbishment / improvements or some redevelopment). There appears to be little room for the release of employment sites, although some poorer quality sites should be considered for release provided they are replaced by better quality employment sites.

Taking into account the additional employment capacity coming through the planning pipeline (about 3.5 ha) there appears to be no need for additional employment land allocations under the base “business as usual” growth scenario. Under the more aspirational high growth scenarios, some additional 11 ha of employment land would be required by 2026.

Given the great uncertainty regarding the UK’s economic outlook it is recommended that supply and demand are closely monitored on an annual basis so that Barnet’s planning policies remain relevant and up to date in terms of employment land.

Appendix A - Experian Forecast Methodology

Experian Business Strategies' detailed local level forecasts are based on an integrated regional sectoral model of the UK. The model is constructed on the basis that each UK region and each sector of the economy is treated as an economic entity in its own right, for which forecasts can be made using historic relationships between variables. These relationships differ between regions and sectors on the basis of their differing economic structures, historic performances and other factors. At the same time, the UK as a whole is modelled on the basis of relationships at the national level. By solving at both levels simultaneously, the model produces forecasts that are entirely internally consistent. The forecasts position each region in a genuine national and sectoral context and thus accurately reflect the economic dynamics of each region.

Local authority area forecasts are prepared once national and regional forecasts are finalised. The key feature at this geographical level is that far fewer reliable economic data are available. Experian Business Strategies make use of employment data, drawn from the Annual Business Inquiry along with surveys such as the Labour Force Survey.

Appendix B – Planning permissions 2006-2009

Full Case Reference	Location Address	Proposal	Decision Date
B/00015/09	Friary House, Friary Park, Friary Road, London, N12 9PQ	Change of use of the first floor of the building to a Metropolitan Police Safer Neighbourhood Unit (Use Class B1).	18/02/2009
B/00113/09	Intec House, 49 Moxon Street, Barnet, Herts, EN5 5TS	Retention of change of use from Class B1 to a mixed use comprising B1 (offices) and B2 (car servicing and repairs including use of one bay for MOT Testing) (Sui Generis)	09/03/2009
B/00173/09	23 Union Street, Barnet, Herts, EN5 4HY	Continued use of property as mixed use offices (Class B1) and therapy room (Class D1).	09/04/2009
B/01022/08	Endeavour House, 1 Lyonsdown Road, New Barnet, Herts, EN5 1HR	Change of use of part of ground floor from B1 to mixed use A1, A2 and D1 to be used in connection with the existing building. (Amended Description)	23/06/2008
B/01215/08	Brianco Services Ltd, Queens Road, Barnet, Herts, EN5 4DN	Construction of first and second floors at front of building and conversion of part of ground floor to provide additional B1 (office) floorspace. New roof at second floor level over existing B2 (industrial) floorspace. Renewal of planning permission N00667BD/03.	01/07/2008
B/01452/08	1 Athenaeum Road, London, N20 9AA	Two storey rear extension & an additional third storey to part of existing office building. Alterations to front elevation.	22/07/2008
B/03566/08	6 Nesbitts Alley To Bath Place 206 High Street, Barnet, Herts, EN5 5XG	Two storey office extension to existing building.	19/11/2008
C/01384/BD/08	216 Regents Park Road, London, N3 3HP	Change of use to dual use comprising Class B1 (Office) and Class D1 (consulting rooms, non-surgical procedures and cosmetic procedures) (Non-residential institution) uses. (Site area 118 m2)	20/03/2008
C00002CX/06	First Floor, Tally Ho Corner 100 Kingsway London N12 0EQ	Change of use from Offices (B1) to College (The London College of Traditional Acupuncture) (D1).	30/05/2006
C00007T/06	757 High Road London N12 8LD	Construction of third floor to create additional office floorspace.	06/03/2006

Full Case Reference	Location Address	Proposal	Decision Date
C00458E/07	139-141 Golders Green Road London NW11 8HG	Single storey rear extension to both properties. Change of use to ground floor at 141 Golders Green Road from Medical (D1) to Offices (B1). Provision of off street parking at front.	02/11/2007
C01032T/06	58 Crewys Road London NW2 2AD	Alterations to Roof Including Dormers to Both Sides and Other Minor Alterations to Building to Provide Additional Office Space at First Floor Level	17/07/2006
C01384BC/07	Ground Floor Office - 212-220 Regents Park Road London N3 3HP	Change of use from office (Class B1) to private GP service (Class D1).	09/03/2007
C01503E/06	1a Mortimer Close London NW2 2JY	Demolition of existing single storey (class B8) building and erection of single storey building for office (class B1) use with ancillary accommodation in roof space.	05/02/2007
C01570E/07	Room 1 Top Floor 899 - 901 Finchley Road London NW11 7PE	Change of use from Class B1 to business use for a private hire operation.	21/06/2007
C01760AH/07	Office J, 2nd Floor, 707 High Road London N12 0BT	Change of use from office (Class B1) to minicab office (sui generis).	19/04/2007
C01788S/05	811 High Road London N12 8JT	Rear extension to first and second floor, plus new third floor to provide additional office space. Enclosure of existing plant room and partial car parking area at ground floor level.	16/02/2006
C02905AQ/07	1 Bridge Lane London NW110EA	Change of use from Class A2 to mixed use comprising Class A3 (Restaurant / Cafe) on part ground floor and Class B1 (offices) on part ground floor and two upper floors together with the addition of a third floor for class B1 use (office).	05/11/2007
C02905AR/07	1 Bridge Lane London NW110EA	Change of use from Class A2 to mixed use comprising Class A2 on part ground floor and class B1 (Offices) on part ground floor and two upper floors.	30/11/2007
C04007R/06	2B Golders Green Road London NW118LH	Change of use to D1 - medical laser treatment, from B1 office use.	10/08/2006

Full Case Reference	Location Address	Proposal	Decision Date
C04410D/07	36 High Road London N2 9PJ	Change of use from coach house to office. Replacement of rear single storey building with new two storey building and link to a new single storey rear extension. New shop front. First floor rear extension.	14/06/2007
C04579F/08	198 Golders Green Road London NW119AL	Change of use from hostel (sui-generis) to class B1 office, provision of 5no. off-street car-parking spaces accessed from Ambrose Avenue and 2no. off-street car-parking spaces accessed from Golders Green Road. (Renewal of planning permission C04579E/03 dated 18-12-2003)	18/03/2008
C04581AC/05	Unit 1A Brent Terrace London NW2 1LT	Continued use of building for a mixed use comprising: Class D1 (day care/nursery, educational training, exhibitions, banqueting hall and conference centre), Class B1 (administrative offices), and ancillary provision of bookshop and refreshment area on part of ground floor.	03/01/2007
C05807E/06	54 Crewys Road London NW2 2AD	Refurbishment of office and warehousing to provide 2No. office units.	28/11/2006
C06089B/06	860-864 Finchley Road London NW116AB	Temporary change of use to first and second floor flat at 860 Finchley Road to offices for a period of three years. New access ramp and new door to replace window on South elevation.	27/11/2006
C06994N/06	281 Ballards Lane London N12 8NR	Change of use from B1 to A3, A4 and A5 uses at ground floor of existing building with internal and external alterations.	09/10/2006
C07622J/07	60 Lodge Lane London N12 8JJ	Change of use to office. Single storey side extension.	09/05/2007
C08408G/05	118 High Road / 5 Lincoln Parade East Finchley London N2 9DH	Partial change of use of rear of 118 High Road (currently restaurant toilets) from Class A3 (Restaurant) to Class B1 (Offices). Retention of restaurant facing High Road and internal alterations to provide new toilets.	16/02/2006
C08601E/05	12 Pennine Parade Pennine Drive London NW2 1PB	Change of use to 24 hour administrative booking office for mini cabs (call centre).	09/02/2006
C08788C/06	SOUTHERN HOUSE 1A Bedford Road London N2 9DB	Change of use from office (Class B1) to Private Adult School of English (Class D1).	20/07/2006
C10692K/06	ROMAN HOUSE 296 Golders Green Road London	Change of use of part ground and part lower ground floor from class B1 offices to class D1 medical outpatient centre, with minor external alterations.	26/09/2006

Full Case Reference	Location Address	Proposal	Decision Date
	NW119PY		
C12766B/06	60 - 66 Ballards Lane London N3 2BU	Erection of roof extension to provide new offices.	19/01/2007
C16016A/06	220 The Vale London NW118SR	First floor rear extension to existing offices.	16/03/2006
C16016B/06	220 The Vale London NW118SR	First floor rear extension to existing offices.	14/09/2006
C16334D/06	865e High Road London N12 8PT	Change of use from B1 to D1 (dental practice).	02/03/2007
C16696/06	294-296 Nether Street (Suite 6) LONDON N3 1RJ	Change of Use from Offices (B1) to Private Hire Booking Office	19/07/2006
C16787/06	12-16 Portsdown Mews London NW11 7HD	Demolition of existing garages, erection of a new office building with a garage.	24/10/2006
F/00206/08	216 Regents Park Road, London, N3 3HP	Change of use to dual use comprising Class B1 (office) and Class D1 (non-residential institution) uses (amendment to hours of use previously approved to 9am- 8pm Monday to Saturday and 11am-5pm on Sunday.	02/05/2008
F/00354/08	First Floor 311 Regents Park Road, London, N3 1DP	Retention of first floor rear extension granted planning permission under Ref. No. C01440AV/06 dated 05.07.06 but with its use for office purposes instead of the approved residential use.	06/06/2008
F/00702/08	34-36 WOODHOUSE ROAD, LONDON, N12 0RG	Change of use of two rooms on 1st floor of 34 Woodhouse Road from B1 (office) to D1 (emergency temporary accommodation for young people).	05/06/2008
F/00788/09	42 - 56 Station Road, London, N3 2SA	Retention of change of use of part of ground floor from Sui Generis (mixed B1/B2 offices / printing works) to Sui Generis (mixed B1/B8 builders merchants / offices (106 square metres in total) and incidental A1 use.	21/04/2009
F/00981/08	727-729 High Road, London, N12 0BJ	Rear Extension to second floor. Construction of third and fourth floors to be used as offices. (Class B1).	18/06/2008
F/01318/08	315 Regents Park Road, London, N3 1DP	Change of use of part of first floor and all of second floor from B1 office use to D1(a) medical or health service use.	03/07/2008

Full Case Reference	Location Address	Proposal	Decision Date
F/01497/08	1-5 Nant Road, London, NW2 2PS	First floor side extension to provide additional storage (B8).	07/07/2008
F/01548/08	Land Rear Of 233 Nether Street, London, N3 1NT	Change of use from storage to office (B1) use and addition of two rooflights to flat roof.	01/07/2008
H/00251/08	Hyde House Annex, The Hyde, London, NW9 6LH	Proposed partial change of use of ground floor from office (Class B1) to Class A3 (cafe/restaurant) and Class A5 (hot food takeaway).	12/05/2008
H/00642/09	59 Daws Lane, London, NW7 4SE	Renewal of planning permission reference W13077D/06 dated 19/07/2006 for erection of single storey side extension to provide office space (Class B1) and alterations to Birkbeck frontage to provide parking space for two cars.	21/04/2009
H/00703/08	Photobase House, 518 Watford Way, London, NW7 2PT	Demolition of existing buildings and construction of new three storey office building with basement.	04/06/2008
H/01794/08	Building 16, Inglis Barracks, Mill Hill, London, NW7 1PX	Variation of condition 1 of planning permission reference W01708BC/07 dated 27/02/08 to extend the permitted temporary period that the Inglis Barracks site can be used for B1 and B8 uses to 20th August 2009.	13/08/2008
H/03114/08	Land Rear of The promenade, Edgwarebury Lane, Edgware, HA8 7JL	Erection of single storey, flat roof development for office use (class B1).	14/10/2008
H/04043/08	Athene House, 86 The Broadway, London, NW7 3TD	Demolition of existing office building and erection of a three storey building with A1 (67m2) at ground floor and B1 offices (1642m2) at ground, first and second floors.	27/01/2009
H/04179/08	Seelander House, Grahame Park Way, London, NW9 5QY	Continued use as timber merchants (Sui Generis/use class B8)	15/01/2009
N00070K/06	78 Southover London N12 7HB	Change of use from office (B1) to physiotherapy clinic (D1).	08/09/2006
N00170Q/07	18 & 19 Greenhill Parade Great North Road Barnet Herts EN5 1EU	Change of use from car showroom to Class A1 (retail), Class B1 (office) and Class D1 (medical services)	21/08/2007
N00170R/07	Workshops rear of 17/19 Greenhill Parade Great North	Change of use to storage and distribution of medical equipment, Class B8.	21/08/2007

Full Case Reference	Location Address	Proposal	Decision Date
	Road Barnet Herts EN5 1EU		
N00170S/07	Workshops rear of 17/19 Greenhill Parade Great North Road Barnet Herts EN5 1EU	Addition of Use Class B8 storage and distribution to the existing consent for car repairs / workshop.	04/12/2007
N00336F/06	Green Man Public House 143 High Street Barnet Herts EN5 5UZ	Change of use of part ground and first floors from A4 to B1 office, conversion of part first and second floor into 3 flats with minor elevational changes.	12/09/2006
N00489BL/06	Brunswick Industrial Estate Brunswick Way London N11 1JL	Erection of 4 light industrial/storage and distribution units.	21/07/2006
N00662T/05	65a East Barnet Road East Barnet Barnet Hertfordshire EN4 8RN	Change of use from light engineering to educational (B1-D1).	24/01/2006
N01102E/07	Rear of 7, 8 & 9 Greenhill Parade Great North Road Barnet Herts EN5 1ES	Formation of mansard roof incorporating dormers to rear roof slope and roof slope facing main building to create B1 office accommodation.	18/09/2007
N01368E/05	Solutions House 122- 128 Lancaster Road Barnet Herts EN4 8AL	Change of use of first floor from office (Class B1) to art education area (Class D1).	12/01/2006
N01368F/06	Solutions House 122- 128 Lancaster Road Barnet Herts EN4 8AL	Retention of change of use of first floor offices (Class B1) to art education area (Class D1).	12/12/2006
N02666M/06	York House Station Approach New Barnet Barnet Hertfordshire EN5 1LP	Change of use from office to residential.	14/03/2007
N04026K/07	Land to r/o 2-24 Lytton Road Lytton Road New Barnet	Construction of a new 3-storey building with B1 (offices) and B8 (storage) on ground floor and B1 (offices) on upper levels.	16/10/2007

Full Case Reference	Location Address	Proposal	Decision Date
	Hertfordshire EN5 5BY		
N09566T/06	Rear of 16-20a High Street Barnet Hertfordshire EN5 5RU	R/O 16 High street - Change of use to B1 offices including demolition of existing side conservatory and associated landscaping and parking for 3No. cars including 1No. disabled car parking space. R/O 20 & 20A High Street - Demolition of rear shop and storage. Formation of new ground floor and excavation of basement to form offices. Associated small courtyard space and parking for 2No. cars.	17/10/2006
N09732D/07	6 Alston Road Barnet Hertfordshire EN5 4ET	Change of use from B1 (Offices) to A1 (Hairdressers).	21/06/2007
N12277A/06	The Old Print Works Tapster Street Barnet Hertfordshire EN5 5TH	Erection of a three-storey office building.	30/03/2006
W00162E/06	20 Vivian Avenue London NW4 3XP	Change of use from commercial use A1 to business use B1, to facilitate a Metropolitan Police neighbourhood office.	20/10/2006
W00459AL/06	1-3 Hale Lane London NW7 3NU	Change of use from office/storage to retail.	15/11/2006
W01141BS/05	Ground floor commercial unit Phase 4 Langstone Way NW7	Change of use from class B1 (offices) to A1 (retail)	08/02/2006
W01154AM/07	105 West Hendon Broadway Edgware Road London NW9 7BN	Change of use of first floor from B1 use to D1.	19/09/2008
W01347G/06	Edgware Telephone Exchange The Forum Edgware Middlesex HA8 7BA	Change of use of part of site to class B8 (storage and distribution), following demolition of existing building.	19/10/2006
W01406DJ/08	Unit 21 Garrick Road Industrial Estate Hendon London NW9 6AQ	Change of use from light industrial units (B1) to commercial bakery (B2).	28/03/2008

Full Case Reference	Location Address	Proposal	Decision Date
W01523AD/05	Unit 7 The Technology Park Colindeep Lane London NW9 6BX	Change of use from Class B1 (offices) to Class D1 (non-residential institution).	16/02/2006
W01544AM/05	Peel Centre Metropolitan Police Training Establishment Aerodrome Road Colindale, London NW9	Retention of a new two-storey building for B1 use. Variation of Planning Permission W01544X/00 dated 20-02-01 for "Erection of two-storey building for use as office/call centre (Class B1) with ancillary parking and landscaping". Addition of two parking spaces.	27/02/2006
W01708BC/07	Inglis Barracks London NW7 1PX	Temporary change of use of building 16 to B1 (Business) and B8 (Storage and Distribution) for a period of 1 year. (Site Area 900m2).	03/03/2008
W02082S/07	Land R/O 140-146 Brent Street London NW4 2DR	Erection of a two storey office building on vacant site.	12/06/2007
W02323C/06	248 Hendon Way London NW4 3NL	Alterations to existing basement including removal of plant, new enclosure and stairs. Use of basement for B1 purposes (offices).	10/07/2006
W07365C/08	25 Gadsbury Close London NW9 7EZ	Change of use from sheltered housing officer flat and office to office (Class B1) to accommodate a community alarm scheme Barnet Homes lifeline service. (Area 50m2).	15/04/2008
W09597D/06	1 Scout Way London NW7 3JW	Demolition of existing two-storey office building and erection of two-storey office building with basement and parking for three cars on front forecourt.	15/11/2006
W13077D/06	59 Daws Lane London NW7 4SE	Erection of Single Storey Side Extension to Provide Office Space (Class B1) and Alterations to Birkbeck Frontage to Provide Parking Space for Two Cars	19/07/2006
W16168/07	20 The Concourse London NW9 5XA	Change of use from A1 to B1 (102 m2 Area).	23/01/2008

Appendix C – North London Business Survey 2009: Results for Barnet

Introduction

The second North London Business Survey has been conducted with this document summarising the results. Extensive planning preceded the survey with research into survey methods, best practice through our sister agencies and consultation on questions asked. We chose an e-mail survey as it proved to be more cost effective and easier for companies to respond than the previous year's postal survey. We will continue to send the survey via e-mail as there has been a 67% increase in responses compared to the previous year. 3,500 surveys were sent out for 27th March 2009 to our Connect subscribers and to a selection of businesses by email with an 8th May 2009 deadline.

Analysis

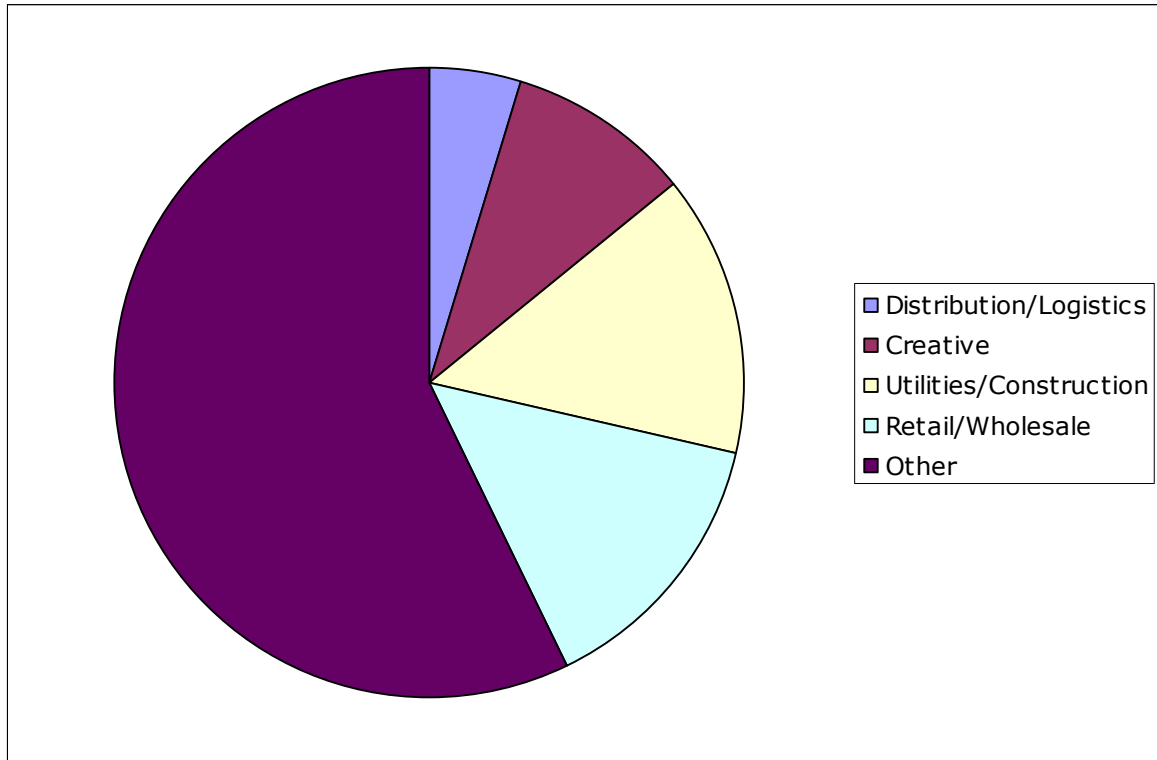
We conducted our results analysis in house, made possible by the nature of our questions posed, the statistics background of NLB staff and efficiency savings. All returned surveys included the recipients contact details which will be used to maintain our databases and to action their responses where follow up is required.

Results by question

This section writes out each question then monitors the response where it is a tick box response or by summarising with narrative for a free text response.

2. What is the main activity of your business?

Retail/Wholesale	14.3%
Manufacturing	0%
Food & Drink	0%
Distribution/Logistics	4.8%
Telecoms/Technology	0%
Utilities/Construction	14.3%
Creative	9.5%
Health & Social Care	0%
Hospitality, Leisure, Travel	0%
Other	57.1%



These industry categories were chosen to maintain consistency with the NLB CRM system. The level of response is indicative of the sectors in Barnet with for example distribution/logistics having very few responses, we know this is not a major sector in the area. The Other section covers mainly Financial & Business Services.

3. How many years has your business been operating?

1-2 years	4.8%
2-10 years	38.1%
10+ years	52.4%
Did not specify	4.8%

Our survey has targeted a good cross section of newly started and established businesses. With an average age of 15 years North London's businesses are in general, well established.

4. How many people does your company employ?

1-9	76.2%
10-19	9.5%
20-49	14.3%

50-199	0%
200+	0%

This information has consistency with responses in question 6 in that we would typically expect companies with lower turnovers to have fewer staff.

5. Over the next 12 months how do you expect your staff numbers to change (%)?

It is promising that a high percentage of the companies that answered this question expect their staff numbers to increase. Of those who responded the average increase that is expected is 20.5% and the average decrease is 18.5%.

6. Into which band does your turnover fall (£)?

0-100,000	47.6%
100,000-500,000	28.6%
500,000-1m	9.5%
1m-5m	9.5%
5m-10m	0%
10m+	0%
Did not specified	4.8%

This information has consistency with the responses in question 4 in that we would typically expect smaller companies to have lower turnovers. It is suggested that in the next survey we target more of the larger companies in North London.

7. What size are your premises?

0-3,000 sq ft	66.7%
3,000-10,000 sq ft	4.8%
10,000+ sq ft	0%
Did not specified	23.8%

The above information is consistent with the employee numbers and backs up the fact that North London is not a major employer location in comparison to say central London where many large company headquarters are based.

8. Are your premises freehold, leasehold or short term rented?

Freehold	33.3%
Leasehold	42.9%
Short term rented	14.3%
Did not specify	9.5%

Again, the above results concur with premise size and employee numbers in that one would expect small and/or new companies to have short term tenancy arrangements. Many respondents did state they work from home which is why the percentage of freehold properties is so high.



9. Within the next 12 months are you considering:

Expanding your existing premises	4.8%
Relocating to new premises within North London	9.5%
Relocating to new premises outside North London	9.5%
Acquiring additional premises	9.5%
Reducing the size of your premises	0.0%
Closing down	4.8%
None of the above	61.9%

This is key information for use in our core business growth role which will be acted upon by NLB. Over half of the respondents intend to stay as they are, indicating the stagnant nature of the economy and a cautious approach from businesses.

10. If you are considering acquiring new/additional premises, please tick in order of importance which factors that would influence your decision on where this property would be located:

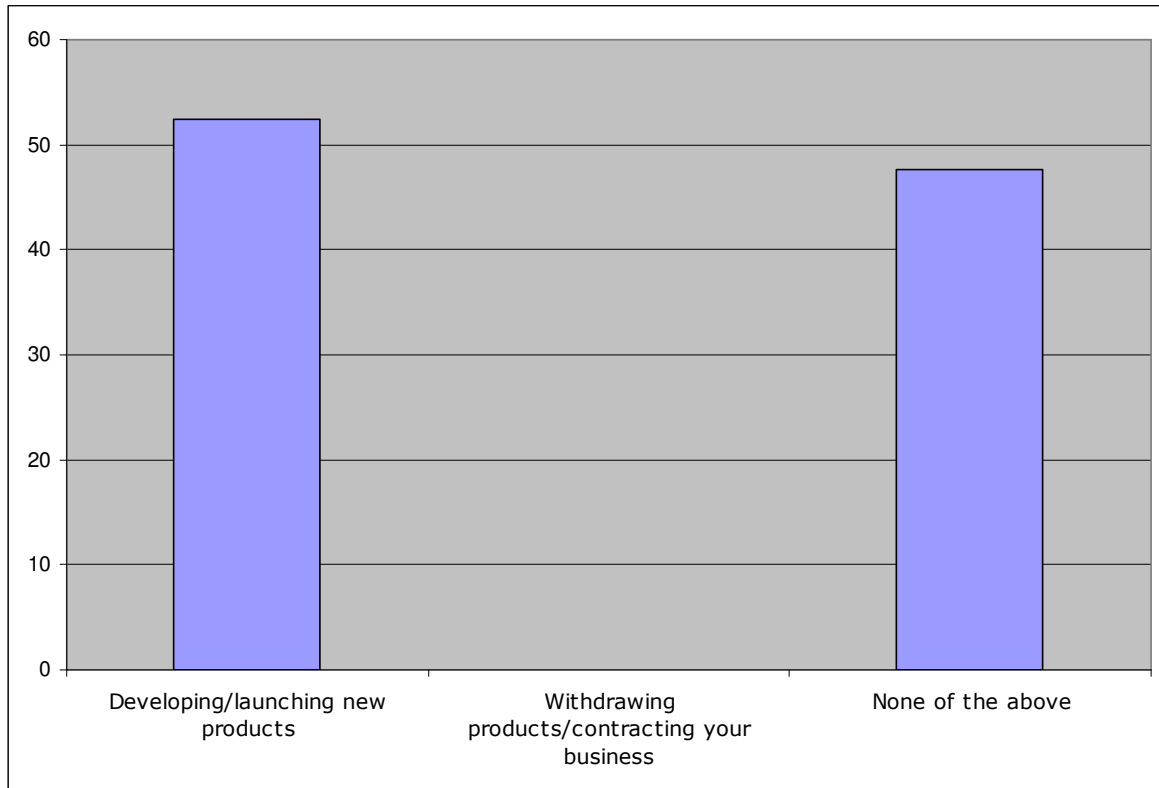
The most important factor in choosing premises is affordability – the inference being North London is currently successful in part due to its stock of an affordable range of premises.

The next most important factor is quality of premises, this is expected as even if premises are very cheap a basic level of quality and serviceability is necessary in order to function.

The two other factors that were felt to be important were, Access to transport links and access to markets.

11. Within the next twelve months will you be:

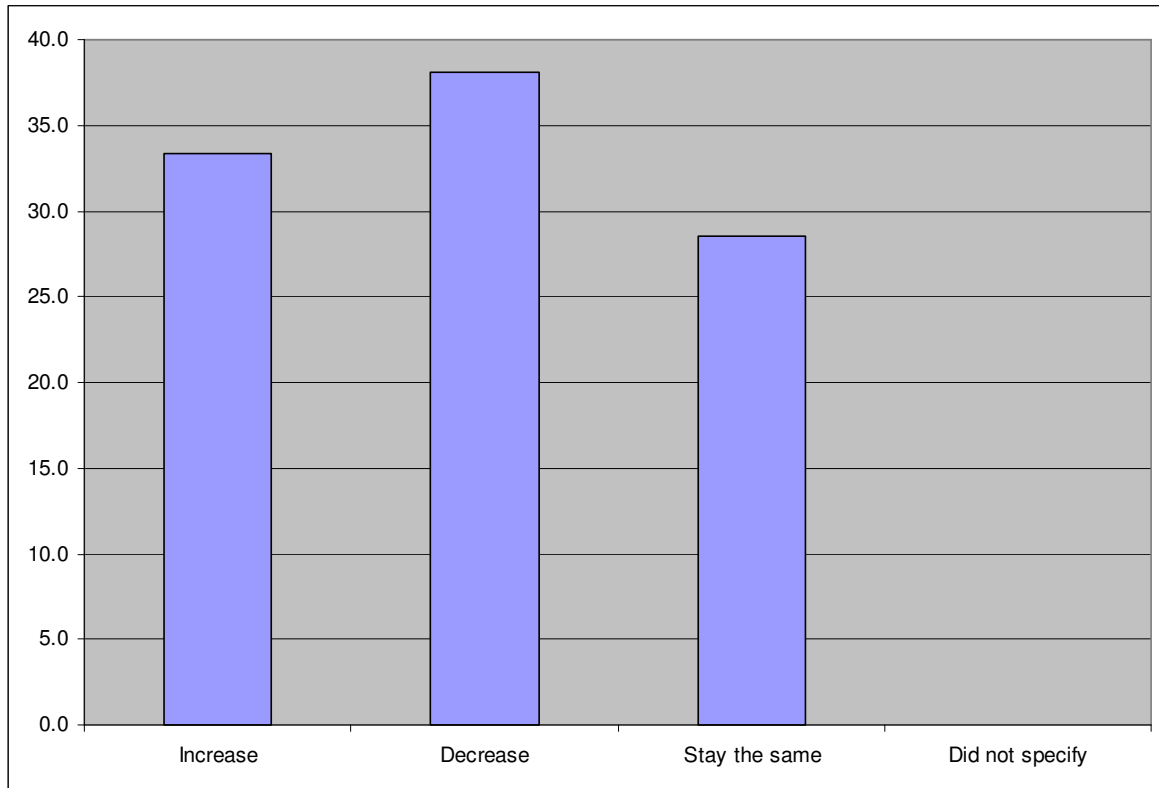
Developing/launching new products	52.4%
Withdrawing products/contracting your business	0%
None of the above	47.6%



The above is an excellent indication of the innovation of North London’s businesses.

12. How do you predict your trading performance in 2009 will compare to 2008?

Increase	33.3%
Decrease	38.1%
Stay the same	28.6%
Did not specify	0%

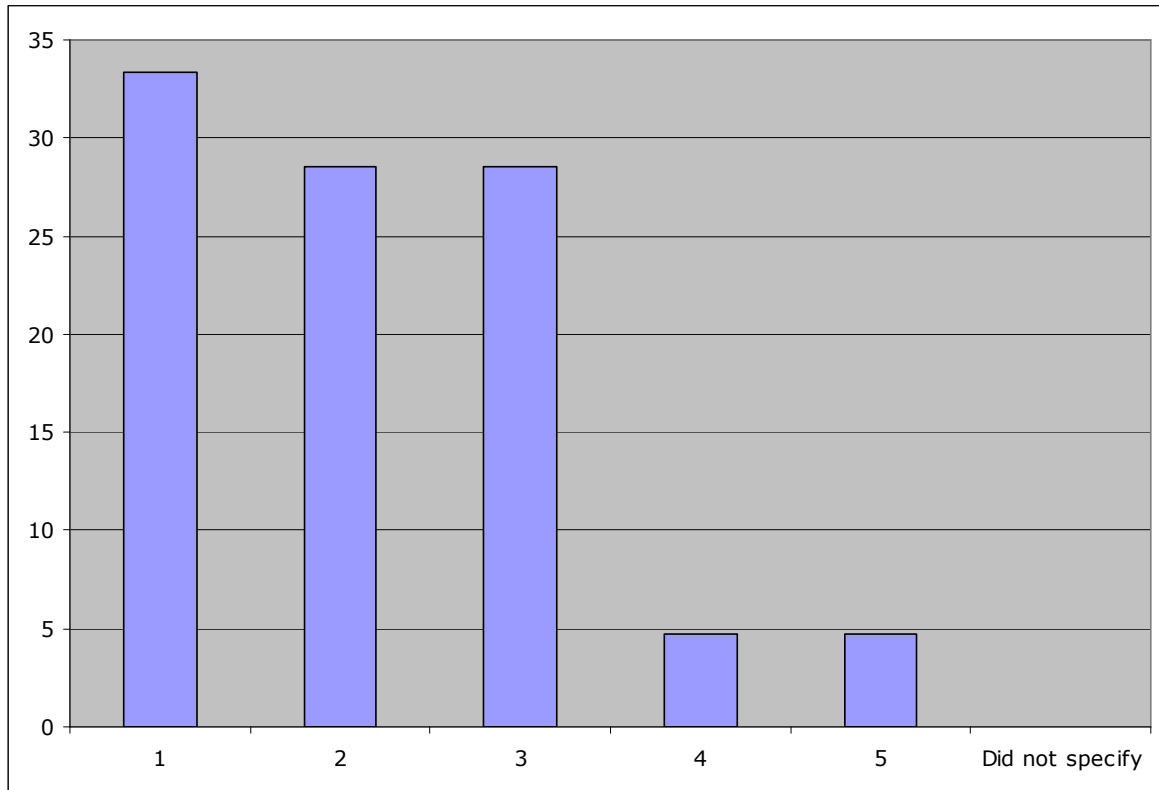


With the economy the way it is we expect some companies trading performance to decrease but it is very encouraging that so many North London businesses predict theirs will increase in 2009.

13. How satisfied are you currently with North London as a business location? Please rank 1-5 (1 is very satisfied, 5 is not at all satisfied).

1	33.3%
2	28.6%
3	28.6%
4	4.8%
5	4.8%
Did not specify	0.0%

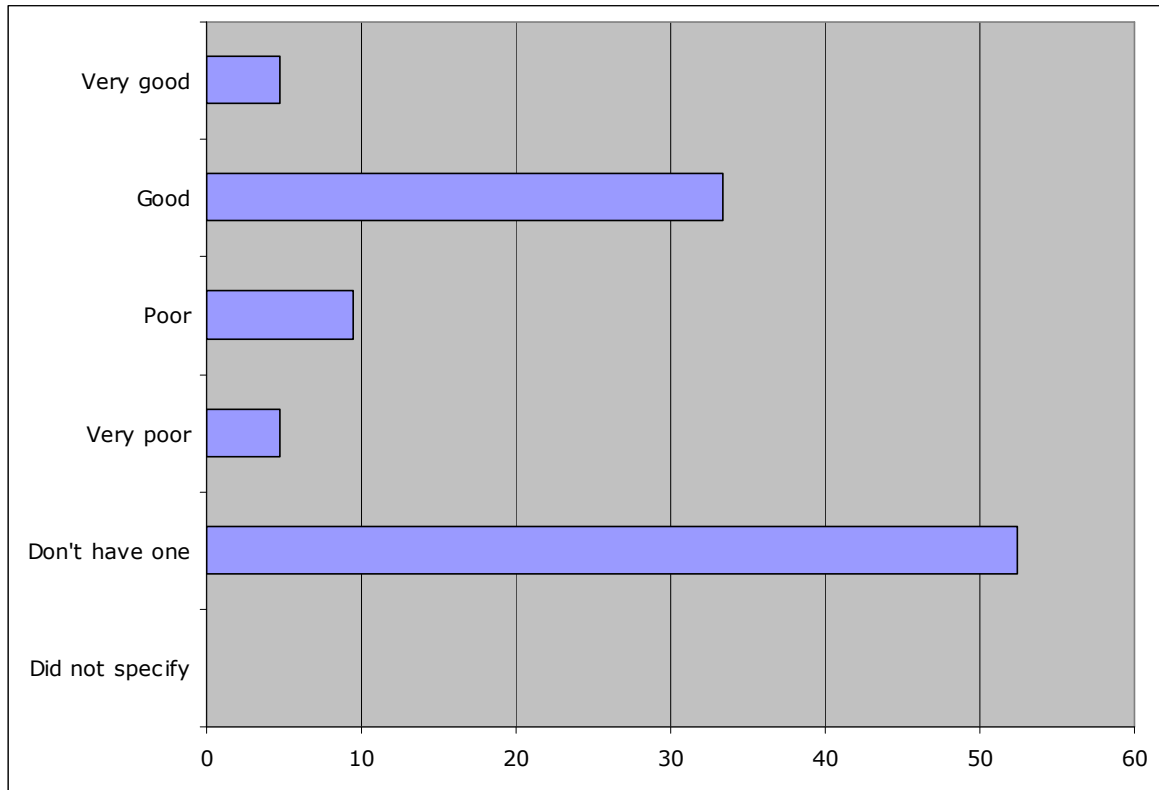
The majority of businesses have a high level of satisfaction of North London as a business location with more companies being satisfied than not satisfied.



14. How would you describe your relationship, if any, with the local borough council?

Very good	4.8%
Good	33.3%
Poor	9.5%
Very poor	4.8%
Don't have one	52.4%
Did not specify	0%

Compared to last years survey the relationships between North London businesses and their local council has improved greatly, going from 15.6% commenting on good relations to 38.0%. Unfortunately a number of local businesses still feel they have a poor or non existent relationship with their local council.



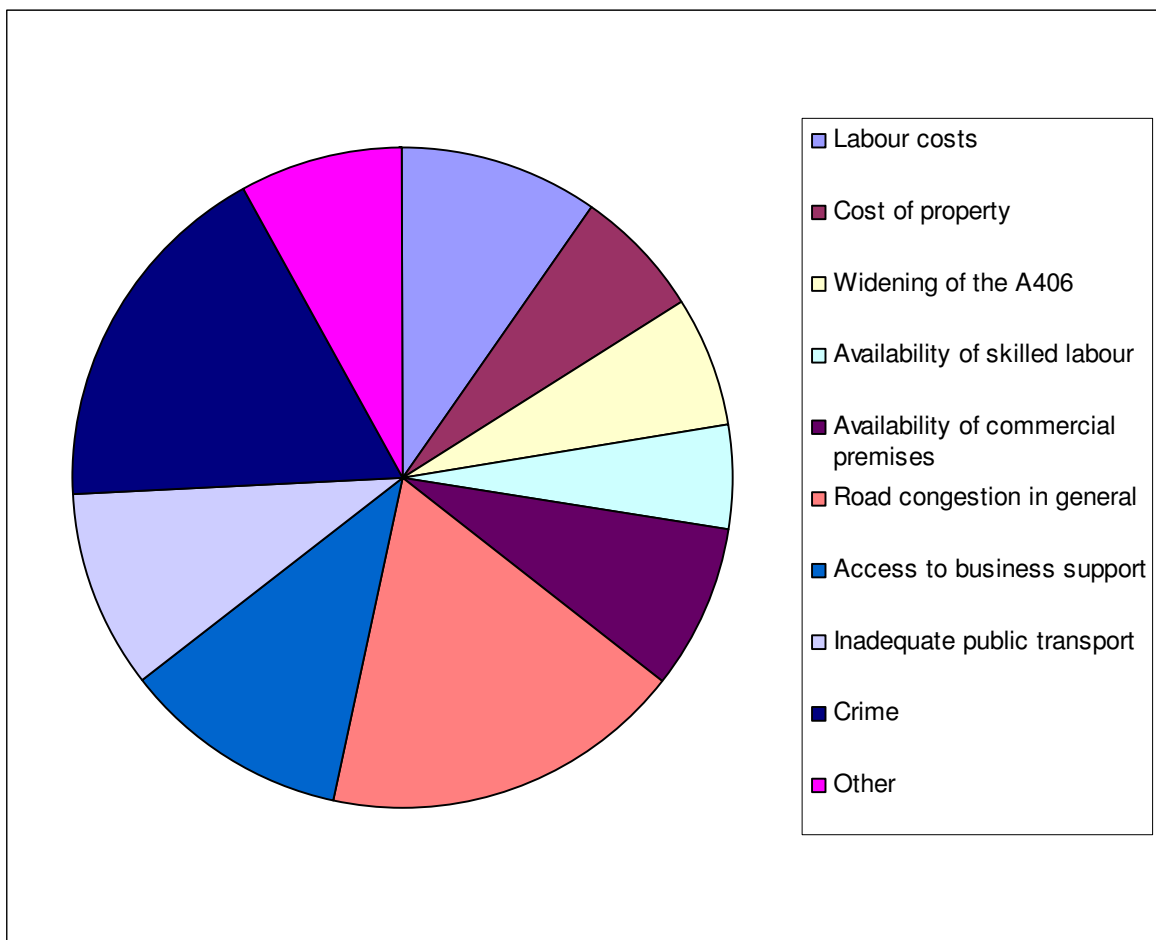
15. How would you rate the following services your local borough provides?

Following last years results refuse collection has gone from being one of the poorest performing services to the best based on 2009 responses. Health and Safety and Trading Standards were considered the next best performing services. Business rates and Parking control were once again rated very poorly.

	Very Good	Good	Average	Poor	Very Poor	Did not specify
Refuse	9.5	38.1	42.9	0.0	4.8	4.8
Business rates	0.0	0.0	76.2	4.8	9.5	9.5
Planning	0.0	4.8	66.7	19.0	0.0	9.5
Licensing	0.0	0.0	61.9	14.3	0.0	23.8
Health & Safety	0.0	14.3	61.9	4.8	4.8	14.3
Trading Standards	0.0	9.5	61.9	9.5	0.0	19.0
Parking control	0.0	9.5	33.3	23.8	23.8	9.5

16. What do you think are the top three issues in North London that you believe need to be addressed?

Labour costs	28.6%
Cost of property	19.0%
Widening of the A406	19.0%
Availability of skilled labour	14.3%
Availability of commercial premises	23.8%
Road congestion in general	52.4%
Access to business support	33.3%
Inadequate public transport	28.6%
Crime	52.4%
Other	23.8%





Note the top three issues from each respondent have been grouped together so percentages sum to 300, giving a relative weighting to their rank. As previous questions have demonstrated the top issues are no surprise, congestion, crime, cost of property and access to business support.

17. How likely is it that your business will remain in one of the North London Boroughs in the next 3 Years?

Very likely	71.4%
Quite likely	19.0%
Not very likely	9.5%
Not at all likely	0%

71.4% of businesses said it was likely that they will remain in North London in the next 3 years with only 9.5% stating that it wasn't very likely.

18. Can you indicate the top three challenges your business will face over the coming 12 months?

Although there were many different responses to this question (full list available on request) the top three challenges that business will face over the coming 12 months are increasing turnover, maintaining cash flow and surviving the recession.

19. North London enjoys a highly accessible location but can you indicate two improvements to the transport system that would help capitalise on this prime location:

Again there were many different responses to this question (full list available on request) but the top two improvements to the transport system that businesses felt were necessary are better public transport links and to minimize parking restrictions.

20. Would you like us to add you to our subscription list for Connect, the free bi-monthly business magazine for North London?

61.9% of responses said they would like receive Connect.

21. North London Business offers a free commercial property service as well as access to other business support. Have you ever used the services of North London Business?

76.2% of responses said they have not used any of NLB's services.

22. Are you interested in finding out more about the services North London Business can provide you with?

52.4% of responses said they would be interested in finding out more about the services of NLB.

23. Please make any additional comments or expand on any of the above answers.

A full list of comments are available on request.