London Industrial Land Supply and Economy Study 2020

SPECIFICATION

Summary of Study and Objectives

The Greater London Authority (GLA, the client) is seeking to commission a suitably qualified consultant team to update the London Industrial Land Supply Baseline (land, floorspace, quality, employment and business) together with an assessment of the economic function, character and role of Strategic Industrial Locations in the capital.

The study will be framed within the wider policy context of the new London Plan and the Government's National Planning Policy Framework. The work will inform the implementation of the new London Plan, the development of Supplementary Planning Guidance (London Plan Guidance), future reviews of the London Plan, the monitoring of London's industrial land supply, the preparation of Local Plans/Opportunity Area Planning Frameworks and support co-ordination of industrial land supply with the wider south east. The study will also inform the development of wider GLA investment programmes in industrial areas in London.

The **objectives** of the London Industrial Land Supply and Economy Study 2020 are:

1. Updating the 2015 industrial land baseline and associated GIS database and mapping, also taking into account industrial and related floorspace across London.

2. Estimating the current and potential future supply of industrial land and related floorspace in London, having regard to the proposals included in Local Plans and adopted/emerging planning frameworks, as well as approved planning permissions.

3. Providing a high-quality digital baseline of London's industrial land supply to be integrated with detailed live data derived from the new Planning London Datahub to allow a more responsive monitoring of industrial supply changes.

4. Updating the employment and business estimates included in the 2015 Industrial Land Supply Study.

5. Producing a set of strategic qualitative indicators to categorise and describe the character and function of London's SILs, their potential for intensification and their role in supporting the sustainable development of London.

6. Assessing industrial and related clusters of capacity in the Wider South East, also taking into account the potential for sustainable freight movements within the wider city-region.

1. Background and Policy Context

1.1 The role of planning policies and decisions in creating the conditions in which businesses can invest, expand and adapt and to take an approach that allows each area to build on its strengths, counter any weaknesses and address the challenges of the future is set out in the Government's National Planning Policy Framework (NPPF)[1].

1.2 Associated practice guidance[2] provides advice and directions on how strategic policy-making and local authorities can prepare and maintain up-to-date evidence about business needs in their areas, including assessing demand and allocating space for logistics and distribution uses. The Plan-making PPG also provides details on how strategic and local planning authorities can gather evidence to understand existing businesses requirements in their areas, as well as how they can use this evidence to plan for business, covering the need for land or floorspace for economic development, assessment of existing and future supply of land available for economic development, and the likely availability and achievability of employment-led development having consideration for market signals.

1.3 The new London Plan[3] underscores the Mayor's approach to industrial land management to ensure that a sufficient supply of land and premises in different parts of London to meet current and future demands for industrial and related functions (such as logistics/distribution, waste management, utilities, land for transport functions) is provided and maintained, also taking into account the potential for intensification, co-location and substitution processes.

1.4 New London Plan Policies E4-E7 set out a plan-led and evidence-based approach to ensure adequate amounts of industrial capacity are provided and maintained through three types of locations:

- *Strategic Industrial Locations (SILs)* – a strategic resource that must be sustained as London's main reservoir of industrial capacity for industrial, logistics and related uses that support the functioning of London's economy;
- *Locally Significant Industrial Sites (LSIS)* - protection of which needs to be reviewed regularly by local authorities and justified on the basis of strategic and local assessments of supply and demand for industrial land and identified in Local Plans; and
- *Non-designated industrial sites* that in some circumstances can also contribute to meet other London's Plan objectives via mixed-use schemes, but in others will continue to perform an important local and strategic role for industrial and related uses.

1.5 The new London Plan support a plan, monitor and manage approach to ensure the retention, enhancement and provision of additional industrial capacity to meet identified demands. Any release of industrial land in order to manage issues of long-term vacancy or to achieve wider planning objectives should be facilitated through the processes of industrial intensification, co-location and substitution. Any release of industrial capacity should be prioritized in locations that are (or are planned to be) well-connected by public transport, walking and cycling and can contribute to other planning priorities including the delivery of housing.

[1] Ministry for Housing, Communities and Local Government, National Planning Policy Framework, MHCLG 2019, Paragraphs 80-82
[2] Ministry for Housing, Communities and Local Government, Housing and economic needs assessment PPG, MHCLG
[3] Mayor of London, The London Plan, The Spatial Development Strategy for Greater London, GLA, 2020

1.6 There is increasing concern that in London's high-value land market, industrial land effectively represents 'affordable' business capacity for a wide range of relatively low-value-added activities, many of which are thought to be essential to support London's wider economic function. This industrial capacity is only protected as such through the operation of the planning system. This project is effectively the first stage of a wider study, which will update and reconcile industrial supply side outputs with different aspects of industrial demand and inform the implementation of the new London Plan's policies, as well as future reviews of the Plan.

1.7 In 2015, London had an estimated 6,976 hectares of industrial land, including 4,552 hectares of 'core uses' (industry and warehousing) and 2,423 hectares in wider related uses such as waste, utilities, land for transport functions and wholesale markets. The 2015 total industrial stock represented a reduction of around 525 hectares since 2010 and 1,300 hectares since 2001. Approximately 3,530 hectares or 50 per cent of the total 2015 stock was within designated Strategic Industrial Locations and a further 946 hectares (around 14 per cent) in Locally Significant Industrial Sites. In 2015 there was an estimated 75,900 industrial businesses operating in the capital (around 15% of all registered businesses in London) and total employment of 347,000 in industrial activities (about 7% of total London jobs).

1.8 Data in planning approvals in annual monitoring of the London Plan[4] suggests that at least 207 hectares of industrial land has been released over the three years 2016/17 to 2018/19, an average of 69 hectares per annum. Further additional transfers of industrial land to other uses are being brought forward in Local Plans and through Opportunity Area Planning Frameworks and Area Action Plans.

1.9 The London Industrial Land Supply and Economy Study 2020 contains three distinct but interrelated parts:

Part A: Industrial Land Baseline update
Part B: Business and employment baseline on industrial land
Part C: Assessment of the economic and functional role of London's SILs

1.10 Part A of the Study will update the 2015 industrial land baseline and associated GIS database and mapping, taking also into account industrial and related floorspace figures across London. It will identify the current and potential future supply of industrial land in London having regard to proposals in Local Plans and emerging planning frameworks including those for London's Opportunity Areas, as well as approved planning permissions. This part will also assess industrial and related clusters of capacity in the Wider South East. Part B of the Study will update the employment and business estimates included in the 2015 Industrial Land Supply Study. Part C will explore the character and function of each of London's Strategic Industrial Locations, as well as their current and potential economic role.

1.11 The outputs of the Study will inform: (a) the implementation of the new London Plan; (b) the development of London Plan Guidance and the evidence base for future reviews of the London Plan– in conjunction with forthcoming associated demand-side research; (c) the monitoring of London's industrial land supply; (d) preparation of Local Plans; (e) work on Opportunity Area Planning Frameworks/Area Action Plans and (f) co-

[4] Mayor of London. London Plan Annual Monitoring Reports 14, 15 and 16, GLA

ordination with the Wider South East of England. The Study will also support the work of the GLA in addressing its growth and regeneration agenda.

2. Project objectives

2.1 The **objectives** of the London Industrial Land Supply and Economy Study 2020 are:

1. Updating the 2015 industrial land baseline and associated GIS mapping, also taking into account industrial and related floorspace across London

2. Estimating the current and potential future supply of industrial land and related floorspace in London, having regard to the proposals included in Local Plans and adopted/emerging planning frameworks, as well as approved planning permissions.

3. 3. Providing a high-quality digital baseline of London's industrial land supply to be integrated with detailed live data derived from the new Planning London Datahub to allow a more responsive monitoring of industrial supply changes.

4. Updating the employment and business estimates included in the 2015 Industrial Land Supply Study

5. Producing a set of strategic qualitative indicators to categorise and describe the character and function of London's SILs, their potential for intensification and their role in supporting the sustainable development of London.

6. Assessing industrial and related clusters of capacity in the Wider South East, also taking into account the potential for sustainable freight movements within the city-region.

2.2 The Industrial Land Supply and Economy Study is used for a variety of purposes including informing planning policies and business planning. In particular the outputs of the Industrial Land Supply and Economy Study 2020 will:

- Provide up-to-date evidence to support the implementation of the Mayor's new London Plan, including its objectives to make the best use of land (Objective GG2) and to grow a good economy (Objective GG5), and to ensure that sufficient industrial capacity is provided and maintained across London (see London Plan policies E4-E7)
- Provide up-to-date strategic evidence to support the preparation of Local Plans by local planning authorities
- Inform the preparation of Opportunity Area Planning Frameworks (new London Plan Policy SD1)
- Inform the development of new London Plan Guidance on Land for Industry and Transport;
- Inform monitoring activities to assess changes affecting London's industrial land supply;
- Underpin the preparation of studies assessing the potential future demand for industrial and related functions in London; and future reviews of the London Plan

- Support the work of the GLA in addressing its wider Good Growth, Covid-19 Recovery and regeneration agendas.

3. Project Requirements

3.1 The London Industrial Land Supply and Economy Study contains three distinct but interrelated parts:

Part A: Industrial Land baseline update
Part B: Business and employment baseline on industrial land
Part C: Assessment of the economic and functional role of London's SILs

Part A: Industrial land baseline update

Task A1: Update and extend the 2015 London Industrial Land baseline, providing a robust 2020 estimate of land and floorspace in industrial and related uses (including logistics, waste management, utilities, wholesale markets and selected transport functions) and vacant industrial land, broken down by borough (including Mayoral Corporations), London Plan sub-regions and industrial Property Market Areas (see below).

3.2 Definitions of Industrial Land: 'Industrial land' should be taken to include land occupied by industrial and warehousing/distribution activities classified in the use classes B1c (new Class E(g)(iii)), B2 and B8, and should also take account of other land uses, including sui generis, which are of an industrial-related nature. Industrial-related uses such as logistics, waste management and recycling, utilities, wholesale markets and land for transport functions should all be taken into account. For consistency with the 2015 baseline the following broad categories of industrial land should be included in map-based, GIS data and tabulated outputs as a minimum requirement:

3.3 Land Use Categorisations:

No.	Category	Sub-category
1	Industry	(a) Light industry (b) General industry
2	Storage and warehousing	(a) Warehouses (b) Self-storage (c) Open storage
3	Waste management and recycling, secondary materials, aggregates	
4	Utilities	
5	Land for transport functions	(a) Land for rail (including intermodal facilities, and depots for rail, DLR, tram and tube) (b) Land for buses (including bus garages) (c) Airport related land and freight (d) Safeguarded wharves and docks

No.	Category	Sub-category
6	Wholesale markets	
7	Emerging and 'hybrid' industrial-related sectors	(a) Data Centres (b) Industrial-related research and development (c) 'Dark Kitchens' (d) Film and TV studios (e) Other emerging industrial sectors
8	Other industrial	
9	Land with vacant building(s) with reasonable prospect of re-use	
10	Vacant industrial land	(a) Vacant cleared sites (b) Vacant sites with derelict buildings

3.4 For non-industrial uses in SILs and Locally Significant Industrial Locations, consultants are invited to identify relevant categories such as residential, retail, office, community services, leisure and recreation and other non-industrial uses having regard to the categories set out in the 2015 Industrial Land Supply Study.

3.5 In responding to the brief, consultants are invited to suggest how mixed-use development (incorporating an industrial component) should be treated in the analysis. Given recent changes to the Use Class Order, and the introduction of Class E covering a wide range of commercial uses (including former B1b and B1c uses), consultants are also invited to detail how they can provide a fine-grained analysis of general/light industrial activities to effectively estimate the amount of land and floorspace occupied by Class E industrial businesses in designated and undesignated industrial locations.

3.6 Furthermore, in responding to the brief, consultants are invited to suggest how vacant industrial land could be effectively categorised to better reflect its actual status (having regard for the categories set out in the 2015 Industrial Land Supply Study), distinguishing between:

- Industrial land with vacant buildings (which can be re-used for industrial and related functions);
- Vacant industrial land (including vacant cleared sites and land with derelict industrial buildings not earmarked for non-industrial re-development); and
- Vacant land in non-industrial pipeline (vacant cleared sites which are already earmarked for non-industrial re-development via approved planning permissions, adopted Local Plan site allocations or Development Plan Document-based de-designation).

3.7 2015 Baseline data: The successful consultant will be provided with all the 2015 industrial land baseline data including the GIS shape files – these will need to be updated and supplemented as appropriate for the 2020 baseline position (proposed new baseline date: 31st March 2020).

3.8 The GIS database and associated mapping should be designed to ensure a standardised and user-friendly tech-based process for collecting, inputting and exporting relevant industrial baseline data on a periodic basis, complementing the new London Development Database (i.e. Planning London Datahub). Site/area boundaries in GIS should also be included and linked to the database together with attribute data. Bidders are invited to specify in their bid how they would design the GIS database and

associated mapping to allow for GIS polygons to be uploaded/modified retrospectively by the GLA should the GIS polygons become available in the future.

3.9 Methodology: It is for the consultant to set out the most appropriate methodology for the update. It may include some or all of the following (the list is not exhaustive):

(a) Field surveys and analysis;
(b) Inputs from published local authority Employment Land Reviews and Industrial Land Audit;
(c) Planning permission data – completions/under construction/developments not started (from the London Development Database, covering the period up to the new baseline date);
(d) Prior approval data on consented/implemented Office to Residential; and Light Industrial to Residential Permitted Development conversions in industrial areas;
(e) Aerial photographs and desk-based surveys (using Google Street View, for example);
(f) Land use data and/or commercial properties database (such as Corine Land Cover data; CoStar);
(g) Valuation Office Agency data on non-domestic rating.

3.10 Consultants should make provision in their bids and timetables for the circulation of draft interim outputs to London Boroughs and Mayoral Development Corporations[5] for their verification. The GLA will co-ordinate this engagement process through its borough liaison mechanisms. Further details will be provided at the project inception meeting.

3.11 GIS database, maps and tabulated outputs should include:

(a) Land and floorspace in industrial, related uses, and vacant industrial land and floorspace (see land use categorisations at paragraph 3.3 above), 2020, broken down by borough, sub-region (2015 Study definition), industrial Property Market Areas (2015 Study definition) and outer London/inner London/CAZ (London Plan definitions)
(b) Land and floorspace in industrial, related uses, vacant industrial land and floorspace, and non-industrial uses, 2020, within Strategic Industrial Locations, Locally Significant Industrial Sites and other non-designated industrial sites (making a clear distinction between industrial sites that were never designated as SIL/LSIS and industrial sites that have been de-designated/released from SIL/LSIS designations). GIS layers defining the boundaries of SILs and Locally Significant Industrial Sites/Employment Locations will be provided by the GLA to the consultants; consultants are required to verify that relevant SIL/LSIS boundaries reflect the latest adopted Local Plans.
(c) Time series comparisons of (a) and (b) above between 2001, 2006, 2010, 2015 and 2020 drawing on the historic datasets from the 2015 baseline and the latest update
(d) Land release 2015-2020 at borough-level compared with the London Industrial Land Demand Study 2017 indicative release benchmarks (Table 13.3).

3.12 Data on floorspace in industrial and related uses should be provided on a consistent basis (Gross Internal Area), with clear assumptions on the translation of net lettable area

[5] Mayoral Development Corporations include the London Legacy Development Corporation (LLDC) and Old Oak and Park Royal Development Corporation (OPDC)

to gross floorspace where this is necessary. Where floorspace data is not available it may be appropriate to derive a floorspace estimate from the site area via a plot ratio.

Task A2: Identify industrial and related land and floorspace available on the market

3.13 In collaboration with commercial property agents, the consultant is asked to identify the scale and spatial distribution of industrial land and floorspace that is available on the market together with data on indicative rents/values (see also related Tasks B1). Output should be mapped (using location/postcode data) and tabulated broken down by borough, sub-region, Property Market Area and outer London/inner London/CAZ (London Plan definitions).

Task A3: Identify land and floorspace in industrial and related uses in the planning pipeline that is potentially changing to non-industrial use including:

(a) Unimplemented planning permissions (i.e. live approvals, not started)

(b) Additional planned release through (i) Local Plans, (ii) OAPFs, (iii) Local frameworks/Area Action Plans, (iv) Signed-off Industrial Masterplans etc…

(c) Prior approval data on Office to Residential and Light Industrial to Residential permitted development conversions (not yet implemented) in industrial areas.

3.14 Data on unimplemented planning permissions (i.e. live approvals, not started) will be supplied to the consultant from the London Development Database. The consultant will be asked to "clean" the data to ensure that multiple permissions for non-industrial uses on the same site are not double-counted in terms of potential loss of industrial land and floorspace. Details of additional planned released through Local Plans, signed-off industrial Masterplans and local frameworks/Area Action Plans will be sourced from boroughs (in collaboration with the GLA). Details of additional planned release set out in Opportunity Area Planning Frameworks will be provided by the GLA.

3.15 GIS database, maps and tabulated outputs should include land in industrial, related uses and vacant industrial land potentially changing to non-industrial use. The outputs should be broken down into the above categories (a), (b)(i)-(iv) and (c), and then aggregated to a total for each borough (avoiding double-counting) and sub-divided by industrial designation (i.e. SIL, LSIS, non-designated industrial sites and released/de-designated industrial sites).

3.16 The GIS database and associated mapping should be designed to ensure a standardised and user-friendly tech-based process for collecting, inputting and exporting relevant industrial baseline data on a periodic basis, complementing the new London Development Database (i.e. Planning London Datahub). Site/area boundaries in GIS should also be included and linked to the database together with attribute data. Bidders are invited to specify in their bid how they would design the GIS database and associated mapping to allow for GIS polygons to be uploaded/modified retrospectively by the GLA should the GIS polygons become available in the future.

Task A4: Identify strategically important capacity for industrial, logistics and related uses in the Wider South East

3.17 The Mayor and GLA Group is working with authorities and other partners in the Wider South East to co-ordinate approaches to strategic issues of common concern[6]. The new

[6] London Plan, Policy SD2 Collaboration in the Wider South East

London Plan underscores the importance of close co-operation to address the wider needs for freight, logistics and port facilities, and exploring the scope for substitution of business and industrial capacity where mutual benefits can be achieved. Having regard to London's functional urban region the consultant is asked to identify and map strategic clusters of industrial/logistics land in the Wider South East beyond the Greater London boundaries alongside strategically significant ports, railfreight terminals, multi-modal transfer facilities and related infrastructure (both inside and outside Greater London boundaries), indicating those that are particularly important in serving London and those important to the rest of the country. Informed by this work consultants should draw together monitoring data (subject to availability) on industrial land and floorspace change, and vacancy rates in the Wider South East (using sources such as VOA data and up-to-date Employment Land Reviews).

Task A5: Set out a methodology to ensure the industrial land and floorspace baselines are maintained up-to-date

3.18 The consultant is asked to set out a potential methodology to maintain the industrial land and floorspace baselines up-to-date over time and to ensure a more responsive monitoring of industrial supply changes in London. The methodology could reflect innovations in the digitisation of the planning system (including the GLA Planning London Datahub/LDD Automation Project[7]) and should include recommendations on how to ensure that the GIS data and updated industrial land baseline estimates are broadly accurate, highlighting known limitations and possible caveats. The proposed methodology should also cover the monitoring of changes in industrial and related floorspace at borough-level and at smaller geographies, where possible.

3.19 The GIS database and associated mapping should be designed to ensure a standardised and user-friendly tech-based process for collecting, inputting and exporting relevant industrial baseline data on a periodic basis, complementing the new London Development Database (i.e. Planning London Datahub). Site/area boundaries in GIS should also be included and linked to the database together with attribute data. Bidders are invited to specify in their bid how they would design the GIS database and associated mapping to allow for GIS polygons to be uploaded/modified retrospectively by the GLA should the GIS polygons become available in the future.

Part B: Business and employment baseline on industrial land

Task B1: Estimate averages and ranges of rents and land values over time

3.20 Consultants should propose a robust methodology for analysing rents and land/property values in industrial areas, for example using Valuation Office Agency (VOA) data, or property consultants and agent databases. Consultants should provide data to illustrate historic trends in rents and property values from 2001-2006-2010-2014-2020 to align with snapshots in the industrial land supply baseline (part A). This should be broken down by borough, as well as grouped into different "industrial property market areas" identified in the 2015 Industrial Land Supply Study 2015. Industrial land/property values should be compared against values for residential and commercial land/space in these areas, to adjust for inflation and relative values in the

[7] https://www.london.gov.uk/what-we-do/planning/london-plan/london-development-database/london-development-database-automation-project

past. Broad differences in rents based on the quality of industrial stock (i.e. high specifications; new built; secondary stocks) should also be highlighted.

Task B2: Estimate the number of jobs in industrial activities and on industrial land

3.21 Consultants should estimate industrial employment in London as well as employment on industrial land in London, based on for example employment densities, IDBR (with assistance from ONS), BRES Employment data at Middle Layer Super Output Areas (MSOAs) and Lower Layer Super Output Areas (LSOAs), Corine Land Cover Polygons, and cross-referenced with recent detailed surveys. At borough level, a breakdown of the number of jobs should be provided at fine grain sector level using the SIC.

Task B3: Estimate the number of industrial enterprises in London

3.22 Consultants should estimate the number of micro (<10 employees), small (10-50 employees), medium (50-250 employees), and large (>250 employees) industrial enterprises in London and sub-divided it by type of industrial activity and industrial designation using similar data sources as above. Where possible, estimates of the number of industrial enterprises in London should be broken down by borough, sub-region, Property Market Area and outer London/inner London/CAZ (London Plan definitions). The proposed methodology should be described at tender stage, and agreed at inception. For example, it may not be possible to make a distinction between micro and small, or small and medium enterprises.

Task B4: Estimate the average size of business premises and vacancy levels in differently-sized premises

3.23 Consultants should also propose a simple way of estimating the average size of business premises in London and by industrial designation, and vacancy levels in differently sized premises. This will help identify whether there are particular shortfalls or pressures in the supply of industrial space for businesses at different stages, such as later stage start-ups and those requiring 'follow-on' space.

Task B5: Assess the average size of freehold ownerships in industrial locations and estimate the proportion of businesses that own or rent/lease their premises

3.24 Consultants should assess the average size of freehold ownerships and the average number of freehold ownerships in industrial locations in London, broken down by industrial designation, borough, sub-region, Property Market Area and outer London/inner London/CAZ (London Plan definitions), where possible. Calculating a ration of the number of businesses (from task B3) and the size and number of freehold ownerships should give an indication of the character of industrial areas in particular boroughs, sub-regions, Property Market Areas and across different industrial designations. For example, a borough having on average industrial locations with a low number of businesses and large land holdings will be different to many small businesses on an estate in single ownership and different again to an estate with multiple businesses and multiple smaller land holdings. This characterisation (to be provided by consultants) will be an important determinant on how industrial locations in specific boroughs/sub-regions/Property Market Areas could be more easily re-developed in a comprehensive way or, for example, how businesses in industrial areas might be organised into Business Associations and Business Improvement Districts (BIDs).

3.25 Consultants should use the findings, methodology and property expertise to propose a simple way of estimating the average proportion of businesses in industrial locations in London (broken down by industrial designation, borough, sub-region, Property Market Area and outer London/inner London/CAZ) that own or rent/lease their premises.

Task B6: Incorporate findings in GIS maps/database

3.26 The estimates from tasks B1 to B5 should be added to the relevant GIS maps and layers and linked to the GIS database together with attribute data. The GIS database and associated mapping should be designed to ensure a standardised and user-friendly tech-based process for collecting, inputting and exporting relevant industrial baseline data on a periodic basis.

Part C: Assessment of the economic and functional role of London's SILs

Task C1: Functional and character assessment of London's SILs

3.27 Consultants are asked to provide an assessment of the quality, character and function of each of London's fifty-five Strategic Industrial Locations (SILs). The assessment should include the following quantitative and qualitative indicators for each SIL (as a minimum), drawing on for example desk-based work, borough ELRs and Industrial Land Audit, primary data collection (where feasible), online photography as well as any other innovative approach consultants wish to propose (to be described at tender stage and agreed with the GLA at inception meeting):

- Overall size, amount of industrial floorspace, and indicative plot ratio
- Type and proportion of industrial businesses/uses (linked to the land use categories at 3.3); for example, this could highlight the proportion of distribution; manufacturing; waste and 'bad neighbour' uses
- Overall amount and proportion of vacant industrial land (having regard to the categorisation covered at 3.3)
- Size of businesses, both in terms of number of employees and premise size;
- Condition/age of building stock (including energy performance)
- Freight accessibility (distance to strategic road network; presence of wharves; railheads and railways freight depots/yards)
- Traffic and congestion on road network
- Presence and proportion of non-industrial uses (retail, office, residential, etc)
- Presence of other non-industrial policy designations/restrictions (e.g. OAPFs; CEZs; s; conservation areas; flood risk; etc)
- Average and/or range of PTAL levels
- Proximity to other/surrounding land uses (employment/business uses; retail; residential; community services)
- Potential for Industrial intensification (indicative spatial/physical potential to accommodate industrial intensification)
- Qualitative commentary on main functional and character findings, as well as on specific areas/aspects with potential to expand/improve

3.28 The character and functional assessment of SILs should provide an accurate picture of how each individual SIL is performing as of 31st March 2020 (proposed new baseline date). The assessment should present information in absolute terms as well as comparatively in relation to the performance of other London SILs.

3.29 Analysis should be based on land and floorspace information, where possible, to allow spatial analysis and better inform future planning work. When this is not possible, analysis should be presented on the basis of employment/business data. For larger SILs it might be worth considering whether it would be preferable to present the assessment findings at smaller sub-area scale (i.e. sub-areas of SIL), when these present clear differences in terms of function and character.

3.30 In relation to the 'Potential for industrial intensification' indicator, consultants are invited to assess the indicative spatial and physical potential of individual SIL/sub-areas within SIL to accommodate industrial intensification, on the basis of area-specific findings and characteristics derived from other indicators and their combination (e.g. high vacancies; bad condition of industrial stock; large presence of non-industrial uses; etc). For example, this assessment could be presented as a scale of potential for industrial intensification (e.g. from very low, to medium, to very high potential) which would provide an indicative overview of what specific SIL/sub-areas within SIL could achieve in terms of additional industrial capacity.

3.31 The assessment for individual SIL should be presented in an easy-to-read format to provide a concise overview of the relevant information. Relevant spatial information should also be presented in a map-based format to allow a better understanding of the relevant characteristics. Where available, information relating to pipeline and planned release of industrial land (see Task A3) should also be over-laid to further inform the qualitative assessment.

3.32 The relevant quantitative and qualitative findings of the character and functional assessment of London's SILs should be added to the relevant GIS maps and shapefiles and linked to the GIS database together with attribute data. Site/area boundaries should also be included in GIS and linked to the database together with attribute data. The GIS database and associated mapping should be designed to ensure a standardised and user-friendly tech-based process for collecting, inputting and exporting relevant industrial baseline data on a periodic basis.

Task C2: Conclusions from assessment of London's SILs

3.33 Consultants should use the relevant findings of the qualitative assessment of London's SILs to draw conclusions around the current and potential economic role of London's SILs, having regard to any Property Market Area and borough-specific finding. Initial recommendations around potential future policy approaches to strengthen the strategic role of SILs, complement the industrial offer of London's SILs and to ensure the provision of a sufficient supply of industrial and related capacity in London should also be developed.

4. Methodology

4.1 Within the identified budget, it is for the consultants to suggest the most effective methodology for achieving the objectives, project requirements and outputs outlined in this specification. It is anticipated that details of the final methodology will be agreed by the client and appointed consultant at the project inception meeting.

4.2 The findings emerging from the wider London Industrial Land Supply and Economy Study, as well as the more detailed functional and character analysis of individual SILs

across London, should be developed to a high-quality standard to ensure these can be adequately used in discussions around proposed industrial masterplans, OAPFs, local planning frameworks/Area Action Plans, and boroughs Local Plan approaches to industrial land.

4.3 The associated forthcoming London Industrial Land Demand Study will explore the longer term fundamental changes and projections in variables (including employment, output and productivity) which will impact London's future demand and supply of industrial and related land. The Mayor will consider potential changes to the new London Plan policy approach to industrial land in light of this associated demand-side research, which will take into account the findings of the London Industrial Land Supply and Economy Study.

5. Project Outputs

5.1 A Technical report in Word and PDF format that includes the final results of the Study fulfilling the requirements of Task A1-C2 of this specification, including the methodology and assumptions used.

5.2 Updated 2020 industrial land and floorspace baselines (broken down by industrial designation, borough, sub-region, Property Market Area and Outer London/Inner London/CAZ), related tabulated outputs, and infographics, maps and visual diagrams which address the project requirements set out in Tasks A1-C2.

5.3 Database and GIS shapefiles containing the details of the 2020 industrial land and floorspace baselines, linked to GIS maps containing location (i.e. site/area boundary polygons) and relevant attribute data, and accompanying information, assumptions and findings. The database and associated GIS shapefiles and mapping should be designed to ensure a standardised and user-friendly tech-based process for collecting, inputting and exporting relevant industrial baseline data on a periodic basis, complementing the new London Development Database (i.e. Planning London Datahub). The database should also facilitate outputs in Excel formats.

6. Process and Timetable

6.1 Tenderers should devise a programme of work and resourcing to reflect the following key stages.

Stage	Detail	Dates
1	Tender deadline	See tender documentation
2	Appointment of consultant	January 2021
3	Inception Meeting	February 2021
4	Draft outputs for borough engagement	March 2021
5	Borough consultation	April-May 2021
6	Consultant delivers draft final report	August 2021
7	Sign off final report	September 2021

6.2 This process will be refined at the first inception meeting to take account of timetabling issues.

7. Resources

7.1 Prices quoted must be competitive but realistic for the work to be undertaken.

7.2 Tenders should detail the consultant's proposals in response to the specification of requirements set out in this brief, detail the proposed methodology for the Study and the members and skills of the project team, including any sub-contractors. Brief resumes and relevant work experience of team members should be included. The submission should show an indicative work programme and assigned tasks.

8. Procurement Timetable

8.1 A full response to this brief should be sent through our e-tendering portal as detailed within the ITT document.

8.2 Upon award of contract, the client will hold an inception meeting as soon as practicable and finalise the methodology and other details of the project, including the timetable.

9. Project management

9.1 The project will be steered by a steering group composed of the representatives of the main sponsors of the project and project managed by a named GLA officer. There will be at least three steering group meetings.