

Park Royal Intensification
Final Report - Draft

21.04.17

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Executive Summary

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Update

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Section A: Context

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1 Introduction

The changing economic and spatial context in London is putting new demands on the city's industrial areas.

- 1.1 Purpose of this Document
- 1.2 Evidence Base
- 1.3 Methodology

1 Introduction

1.1 Purpose of this Document

This study develops architectural proposals to intensify industrial land across Park Royal. This work is directed towards two aims: to develop designs that are deliverable and commercially viable, and to provide a robust analysis of the likely uplift in employment densities that this could achieve across Park Royal.

OPDC Context

The study provides OPDC with appropriate tools to encourage the intensification of industrial land across Park Royal. Reflecting the relative lack of land under OPDC ownership within Park Royal compared to OPDC as a whole this will take two forms: a means to approach landowners with strategies to increase the return on their assets, and through the planning process itself.

It is recognised in general that landowners in Park Royal are not pro-active in increasing returns through unconventional forms of development and site management, and that this study provides the evidence that this is both commercially viable and encouraged by the OPDC.

The study provides tools to encourage ambitious proposals from landowners at pre-application stage, as well as forming a basis for assessing planning applications that will come forward in Park Royal in the near future.

The report is part of a suite of studies that inform the OPDC Local Plan.

GLA Context

The GLA has completed studies into current transformations in the supply of industrial land across London, which has been absorbed into the London Plan, and is currently undertaking a study into demand.

Two scenarios are being developed for the purposes of this demand study, one examining potential use of land outside of London, and a second looking at strategies for intensification of industrial land within London.

The Park Royal Intensification study fits into this second scenario. Although at a city-wide level this intensification could include the mixing of industrial space with residential uses as a means of intensification, the designation of Park Royal as SIL dictates that intensification in the context of this study will consider only industrial mixing.

A key question emerging from this work is what size, type and mix of industrial units is appropriate to intensify from a commercial, spatial and practical perspective.



1 Introduction

1.2 Evidence Base

Recent and On-Going Studies Industrial Land and Supply Study

The Industrial Land and Supply Study examines the pressures on industrial land across London, providing an overview of rates of loss of industrial land, vacancy rates, land values and jobs.

Key findings suggest the release of industrial land must be accompanied with adequate protection and intensification of industrial land across London. Little evidence suggests employment densities in industrial areas are increasing.

Park Royal Atlas

The Atlas provides a detailed study of the typologies, clusters of specific industries and spatial characteristics of industrial space across Park Royal.

This granular study reveals the diversity and complexity of the industrial make-up of Park Royal, and a broad confidence amongst its businesses for future growth.

The Atlas provides a useful methodology for analysing the physical and industrial make-up of Park Royal, and this methodology will be used in this study.

Industrial Land Review

The ILR offers a high level analysis of potential for intensification in Park Royal. This covers market profile and demand,

benchmarks plot ratios and employment densities. The ILR identifies that 4,000-4,500 new jobs could be accommodated within the study area through incremental growth and ad-hoc site development.

The ILR's findings suggest that additional employment generating floor space will need to come from more intensive use of the existing sites.

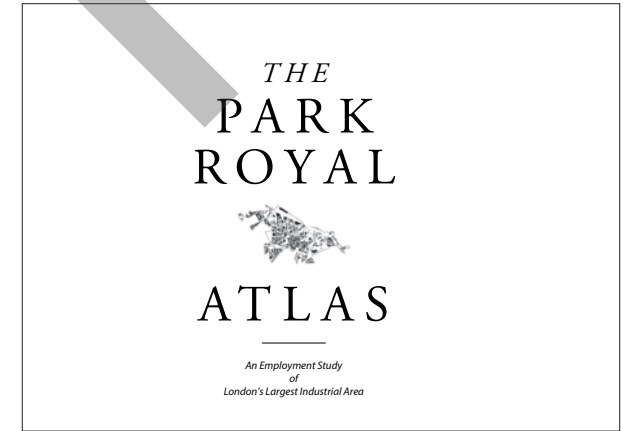
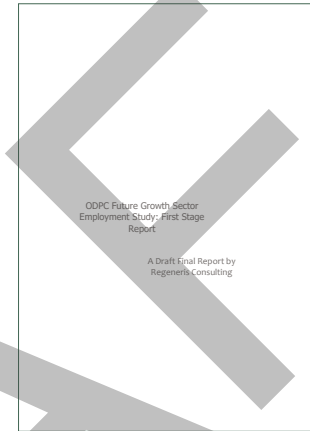
Future Growth Sectors Study

The emerging industrial sectors appropriate to Park Royal are specified in the Future Growth Sectors study. The study specifies the spatial needs and appropriate locations in Park Royal for these sectors, and their associated employment densities.

Industrial Estates Study

The study benchmarks Park Royal in relation to other UK estates, and highlights how Park Royal can build upon its competitive position.

Park Royal's current employment density is relatively high, and the study suggests that intensification should identify appropriate sectors and locations for increased density. This strategy should provide a diversity of unit sizes that makes the area attractive and affordable to growing sectors.



1 Introduction

1.3 Methodology

Approach

We have used a methodology that builds upon existing reliable, recognised datasets that cover the physical and economic makeup of Park Royal.

The method is replicable in order to be a robust justification for our conclusions, and allowing it to be used and updated in the future should updated datasets become available or market conditions change.

The methodology involves two parallel work streams. The first is aimed at engaging with stakeholders both during the study and after its completion in order to encourage projects to come forward in Park Royal.

The second provides the basis for the job capacity of Park Royal.

Context

Assessment of the spatial and economic conditions in Park Royal to understand where and how intensification should be focussed.

Intensification Strategy

Based on the specific conditions in Park Royal, a strategic approach to intensifying which sites types are most appropriate for intensification is developed.

Indicators

Data-driven approach to identify sites that are suitable for intensification, using data gathered through previous studies.

Case Studies

Prototypical sites which are most likely to be bought forward in the short term are developed as design exercises to assess the increase in employment density that could be achieved on this type of site.

Viable Case Studies

Viability appraisal determines which case studies are viable under current market conditions.

Viable Case Studies

Viability appraisal determines which case studies are viable under current market conditions.

Intensification Sites

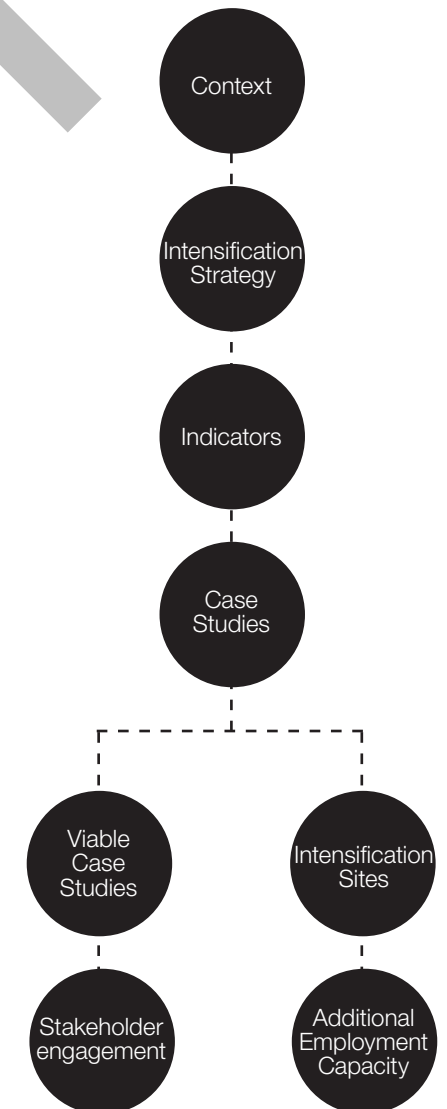
All case studies are used to assess all the sites in Park Royal which could accommodate similar design approaches.

Stakeholder Engagement

Viable case studies are consulted on with key stakeholders to encourage their adoption into future developments.

Additional Employment Capacity

Capacity of the intensification sites is assessed to determine additional employment capacity across Park Royal.



2 Context

This section describes both the current condition of Park Royal's urban fabric and its ecology of businesses, and how Park Royal is anticipated to change spatially and economically over the course of the next local plan.

2.1 Urban Fabric

2.2 Businesses

2.3 Market

2.4 Spatial Policy

2.5 Future Business Growth

2 Context

2.1 Urban Fabric

2.1.1 A Strategic Position

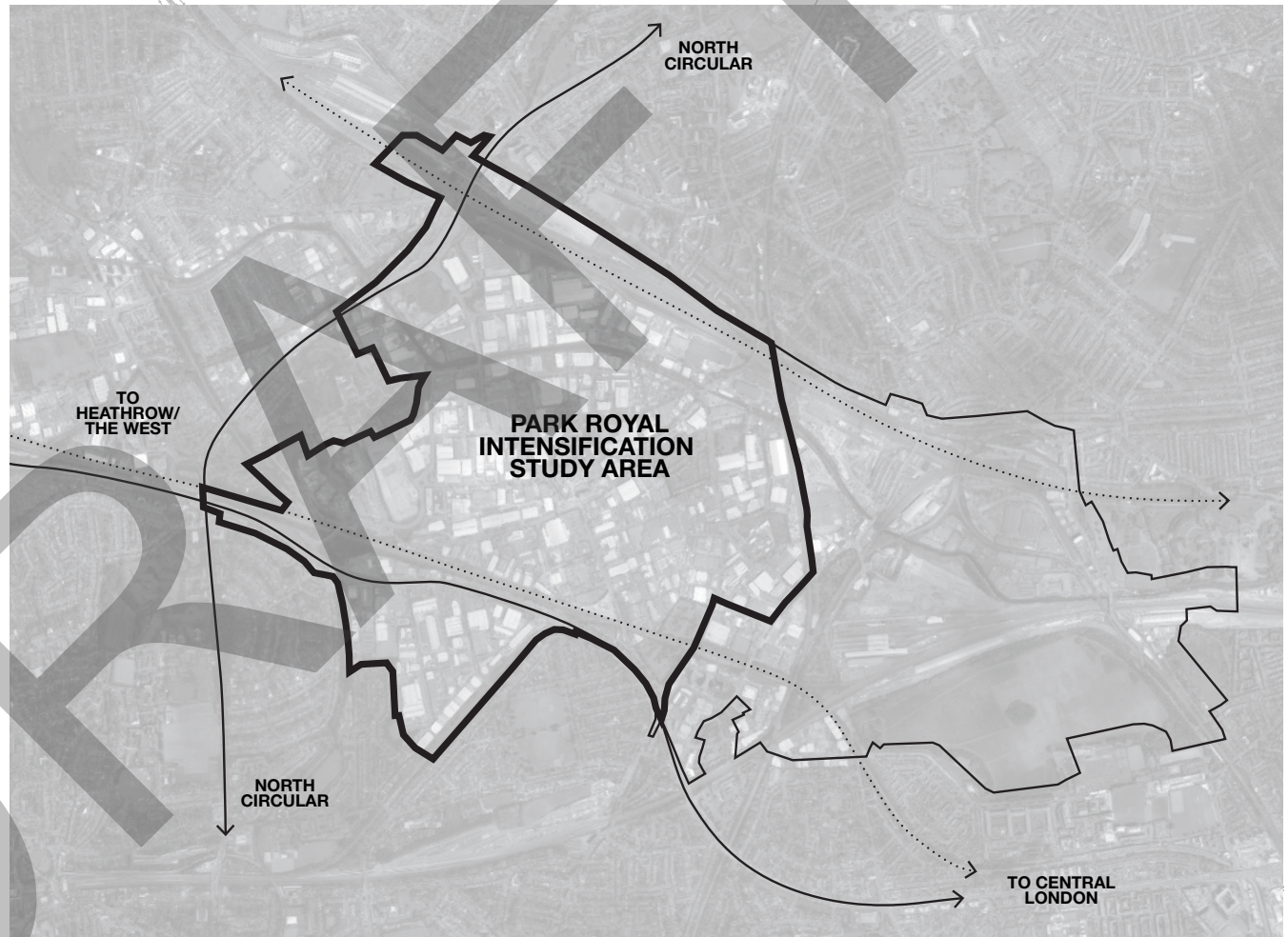
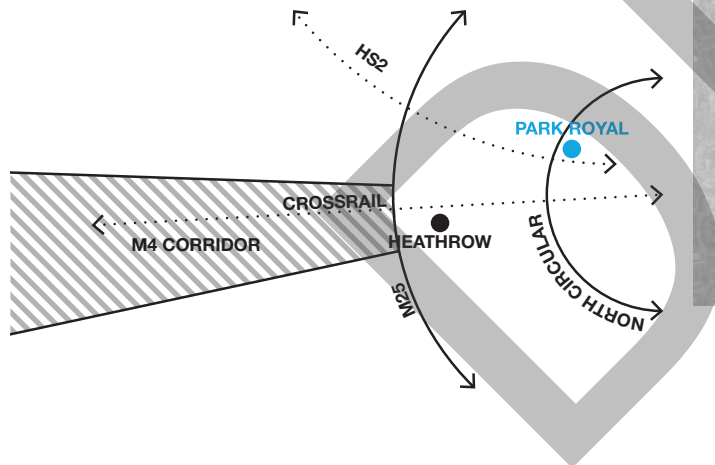
Park Royal Intensification Study Area

The study area encompasses the western portion of OPDC, containing the majority of industrial land within the Authority's boundary. The strategic position of Park Royal sets the long term imperative to intensify here, providing the market context in which alternative forms of industrial development are most likely to be viable, and where intensification can give long-term benefits to Park Royal, OPDC and London at large,

Access to Markets

Park Royal is positioned at a key location between national infrastructures to the west (the M4 Corridor, M25 and Heathrow) and large markets in West and Central London.

The Industrial Estates Study identifies this position as a key strength that will likely ensure Park Royal is a key industrial location in London over the long term.



2 Context

2.1 Urban Fabric

2.1.2 Infrastructure and Places

Places

Park Royal is constituted by a number of places of very different character, each undergoing change at differing rates and driven by different dynamics. The study area comprises four places identified in the Local Plan. Park Royal (1) forms the majority of the site and is characterised by a mix of industrial fabric. Park Royal Centre (2) contains non-SIL land, a mix of uses around the Central Middlesex Hospital. Old Park Royal (3) is characterised by older, denser industrial fabric and a closer urban grain. The Grand Union Canal forms a place extending to the west into the Old Oak Common development area.

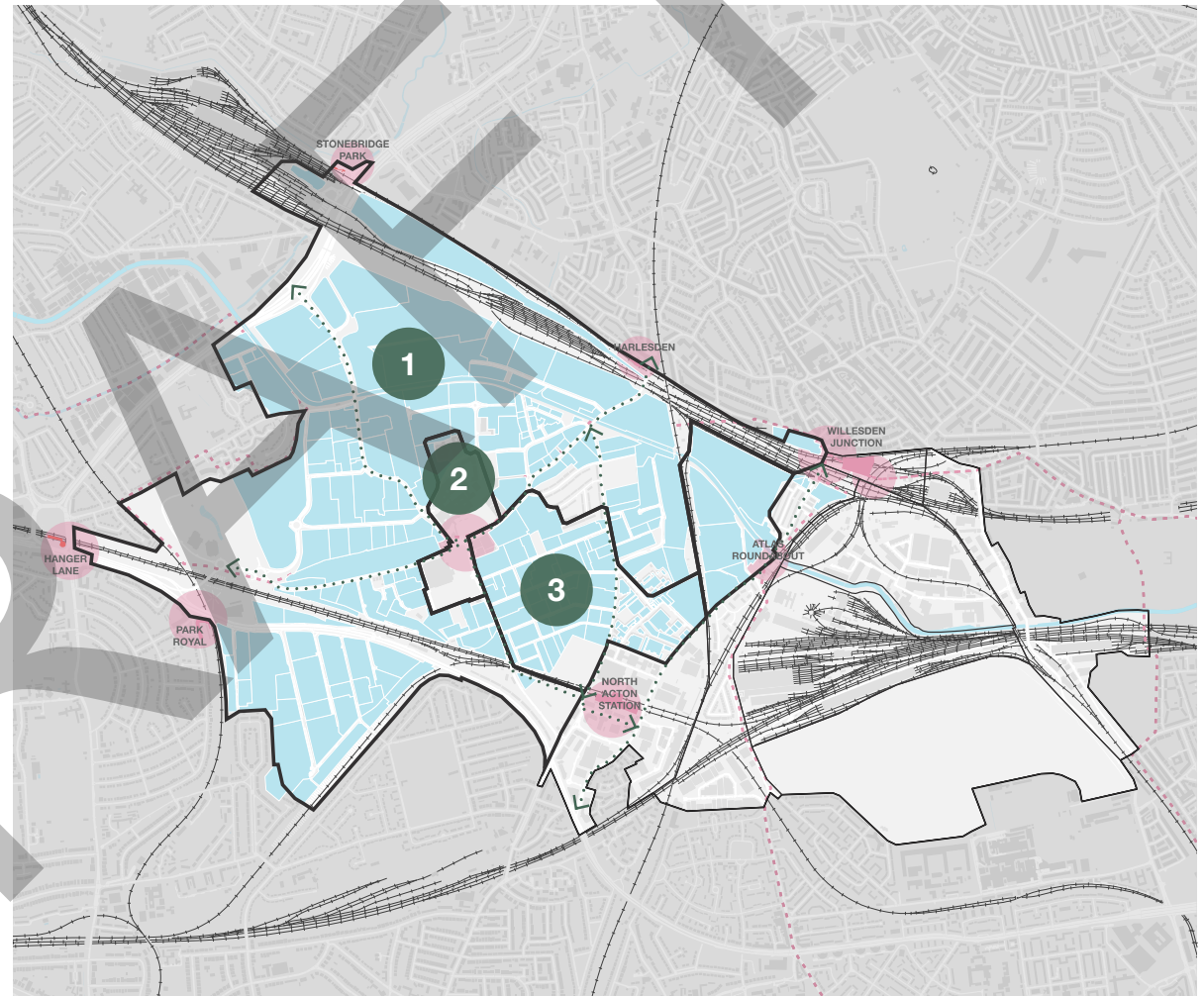
Infrastructure

Park Royal is served by the A40 and North Circular, and six train stations around its perimeter.

Whilst it is recognised that a significant increase in employment densities in Park Royal would require significant infrastructural investment, the requirements and costs of this are being addressed in other studies and have not been included in this study.

Key

- Key Connections
- Linked High-Streets
- Key Centres
- Main Public Transport Stations
- Existing Footprint
- OPDC Area
- Borough Boundaries



2 Context

2.1 Urban Fabric

2.1.3 Building Types

While the majority of the built space in Park Royal is warehousing, the number of workplaces in warehouses is similar to the number of workplaces in small offices.

Non-warehouse space is concentrated in the older fabric around Old Park Royal.

Categorised based on Park Royal Atlas workspace categorisation.

Key

- Small office
- Large office
- Retail
- Workshop
- Small warehouse
- Large warehouse
- Other
- Study area boundary



2 Context

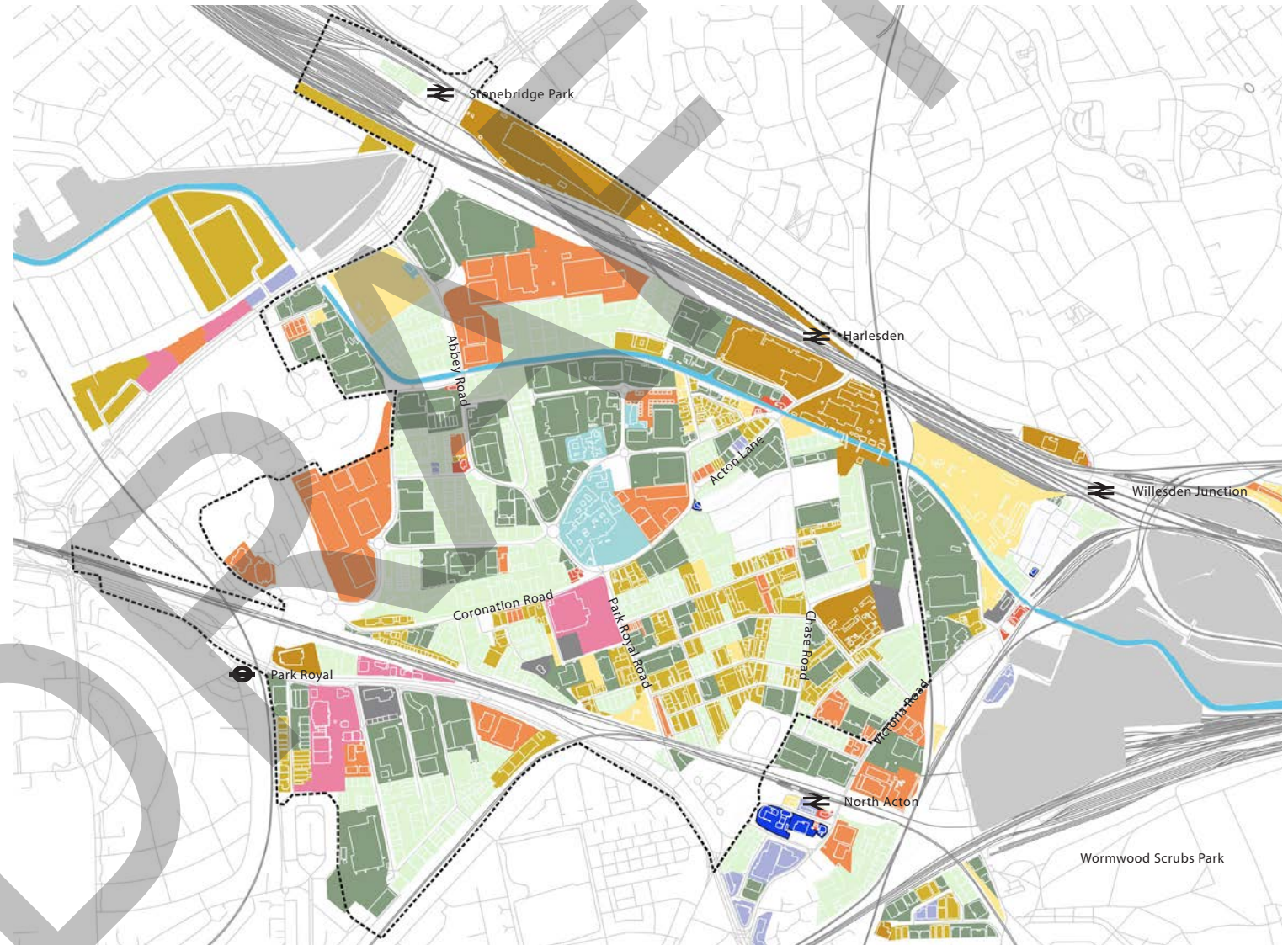
2.1 Urban Fabric

2.1.4 Site Types

The site typologies in Park Royal reflects the high density of the estate and the high level of activity in warehousing and transport. The Industrial Estates Study identifies that Park Royal has the largest proportion of dense industrial employment sites amongst all the case study sites (21%).

This density suggest that intensification will need to be incremental, reflecting the lack of vacant and under-utilised land.

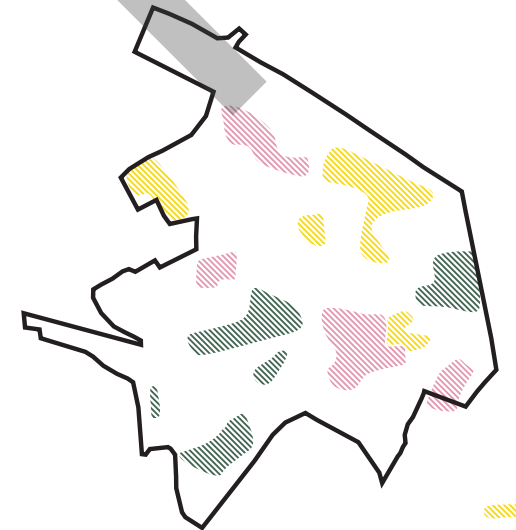
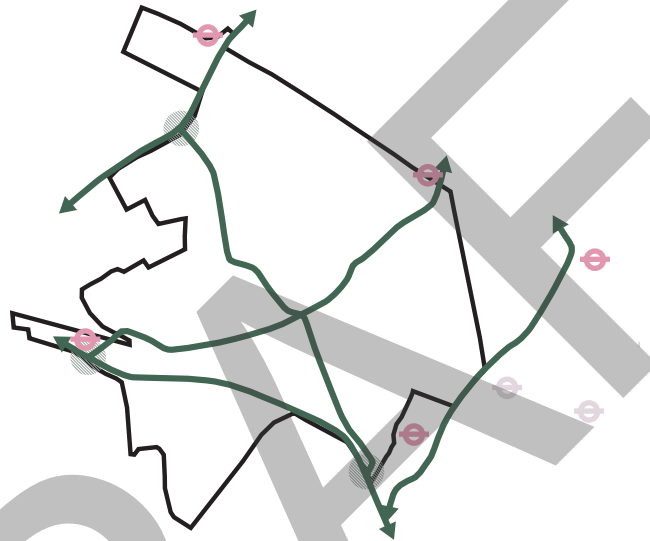
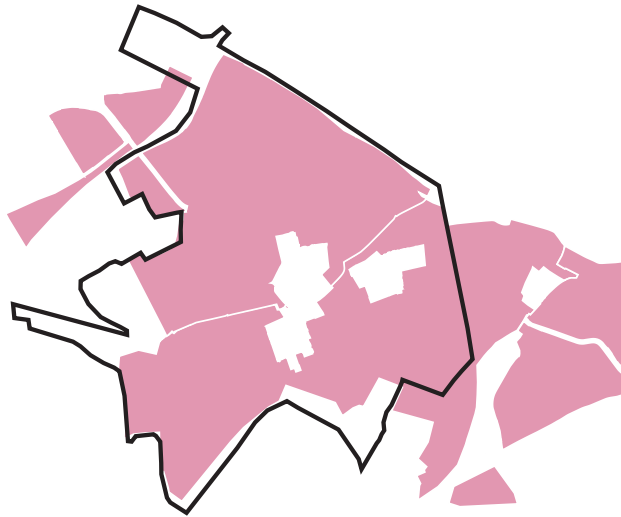
- Standalone warehouse
- Industrial estate
- Dense light industrial
- Open industrial land
- Large utilities site / bespoke premises
- Retail park / large retail warehouse
- Business centre
- High street type
- Hotel or standalone office building
- Businesses in primarily residential area
- Other
- Vacant lot
- Study area boundary



2 Context

2.1 Urban Fabric

2.1.5 Existing Strengths



SIL Designation

Park Royal's SIL designation is one of its key strengths. Although the intensification of Park Royal will bring about significant change, it should also consolidate and protect the areas industry.

Transport Infrastructure

Park Royal has very good access to transport infrastructure for bringing in goods and people. The significant uplift in employment density should not compromise this, and should where possible improve efficiency.

Established Clusters

Industries with a high propensity to cluster already exist in Park Royal. The dynamic of clustering companies can play an important role in driving intensification.

2 Context

2.2 Businesses

2.2.1 Clustering by business activity

The existing business sectors in Park Royal have varying incentives to intensify. Some clusters form due to specific spatial needs (logistics, storage and wholesale), others have a high propensity to cluster due to positive agglomeration effects (such as some services).

Mapped through SIC code classification and business sector as assigned in ILR.

Key

- Manufacturing: food-related
- Manufacturing: metal-related
- Manufacturing: reproduction
- Manufacturing: other
- Utilities
- Construction
- Vehicle Sale & Repair
- Wholesale: food
- Wholesale: other
- Transport & Storage
- Info & Comms
- Services: professional
- Services: other
- Public services
- Retail, Restaurants, Hotels
- Other
- Vacant
- Unknown

..... Study area boundary



2 Context

2.2 Businesses

2.2.1 Economic Profile

It is estimated that the Old Oak and Park Royal economy employs 52,300 people across around 2,300 businesses, with the majority of activity currently located within Park Royal. The area has experienced strong growth in recent years: employment has increased by 19% (8,300 jobs) since 2009, while the business base has grown by 18% (350 businesses) over the same period.

The OPDC area is noticeable for the structure of its business base: while the majority of businesses are micro sized (with around three-quarters of businesses employing between 0 and 4 people), this proportion is low when compared to other areas. Reflecting the nature of the area, there is a comparatively strong concentration of larger businesses in the area.

A detailed analysis was carried out of the sector profile of the area. This shows that the largest sectors in the OPDC development area are wholesale (7,300 jobs); ICT, Media and Creative activities (6,700 jobs); public administration, education and health (6,400 jobs); retail (5,600 jobs); and business support services (5,900 jobs). Combined these five sectors account for 61% of all employment in the area. However, in terms of levels of relative specialisation, the most important sectors in the OPDC

development area can be considered to be food manufacturing (4,400 jobs and LQ of 13.5), transport (2,500 jobs and LQ of 1.3), wholesale (7,300 jobs and LQ of 4.2), warehousing (3,100 jobs and LQ of 5.8), business support services (5,900 jobs and LQ of 1.1) and ICT, Media and Creative Services (6,700 jobs and LQ of 1.2).

Regeneris to confirm this is up to date.

2 Context

2.2 Businesses

2.2.2 Vacancy

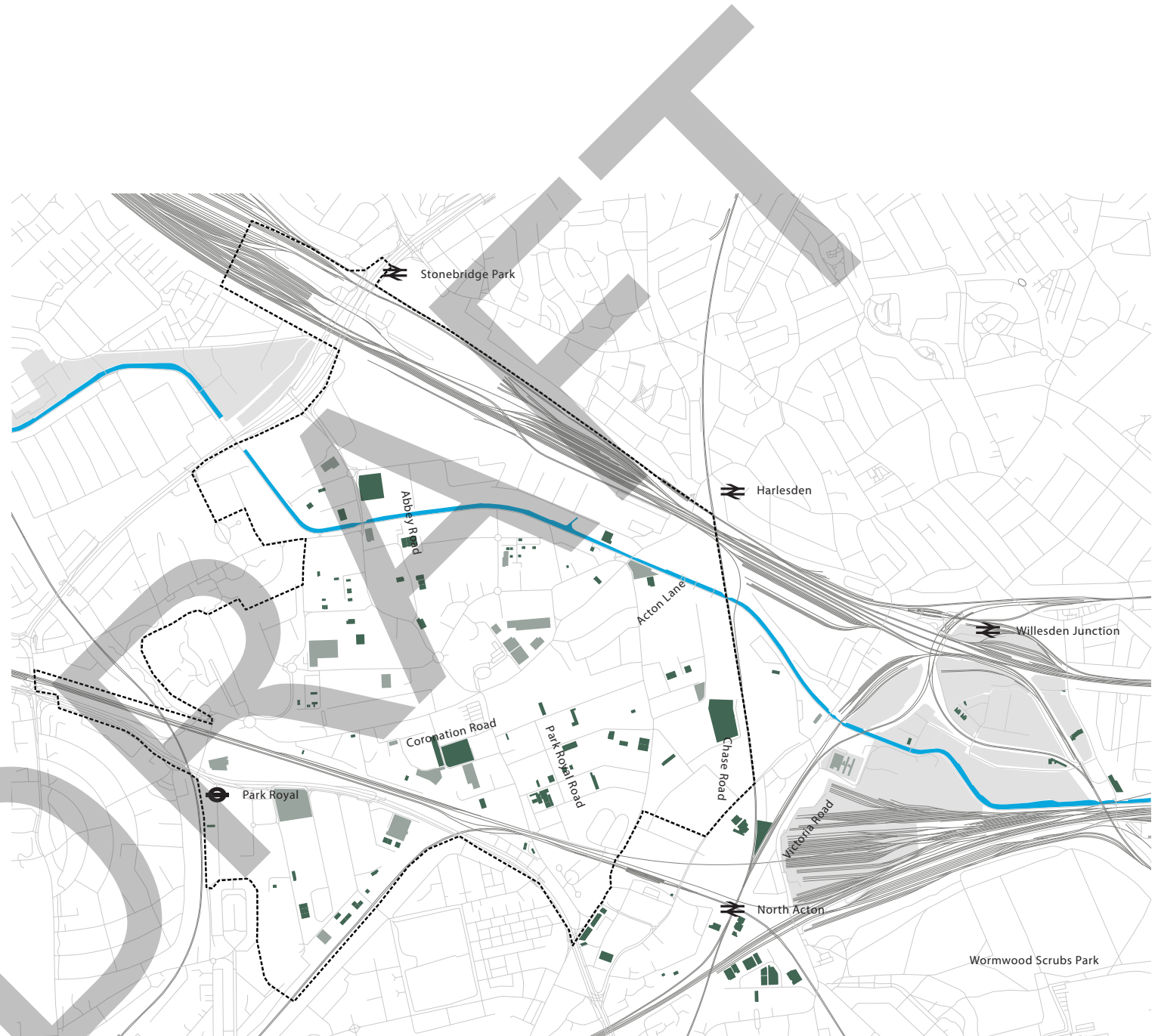
Vacancy levels in Park Royal are average compared to other similar estates studied in the Industrial Estate Research, reflecting the pressure on industrial land supply in London. Brent and Ealing have relatively low vacancy rates compared to other London boroughs.

As such, large plots of land for new intensive development are few. As such, strategies for delivering large industrial intensification projects in Park Royal need to be driven by delivery/phasing, looking to incentivise comprehensive re-development in Park Royal to deliver significant uplift in job numbers.

1.9%
Vacancy rate, Brent

3.3%
Vacancy rate, Ealing
Source: London Industrial Land Supply & Economy 2015 (AECOM, Cushman & Wakefield, We Made That)

Source: Updated from Park Royal Atlas, GLA 2014



2 Context

2.2 Businesses

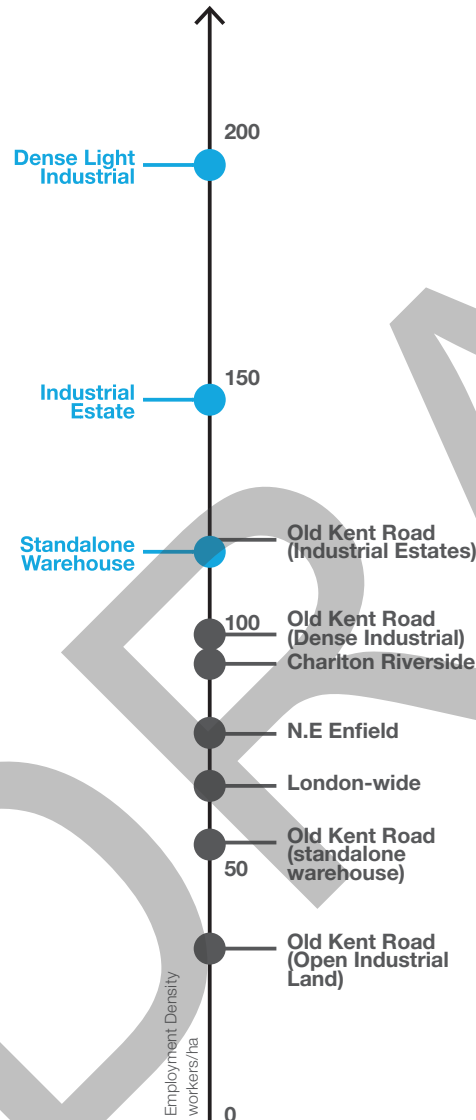
2.2.3 Employment Density

Benchmark densities

Compared to other London industrial estates, parts of Park Royal achieve very high employment densities, particularly areas of dense light industrial fabric.

Although as a whole Park Royal has a lower employment density measured in floorspace area per employee, this is due to the large amount of land used for utilities and waste on Park Royal relative to other industrial areas in Outer London boroughs. These uses are key to the functioning of Park Royal and the city around it, and hence should not be the target of intensification strategies.

Intensification strategies should therefore provide a significant increase in density on the existing already dense fabric.



Sources: Industrial Land Review, OPDC 2016
London Industrial Land Supply & Economy 2015 (AECOM, Cushman & Wakefield, We Made That)
North East Enfield Employment Study 2016 (We Made That)
Old Kent Road Employment Study 2014 (GLA & Southwark Council)
Charlton Riverside Employment Activity & Heritage Scoping Study 2017 (in progress, We Made That & James Hulme)



2 Context

2.2 Businesses

2.2.4 Employment Density

Densities by Location

Employment densities are higher in Old Park Royal where the urban grain is tighter, and where transport and local amenity support more intensive use of workspace.

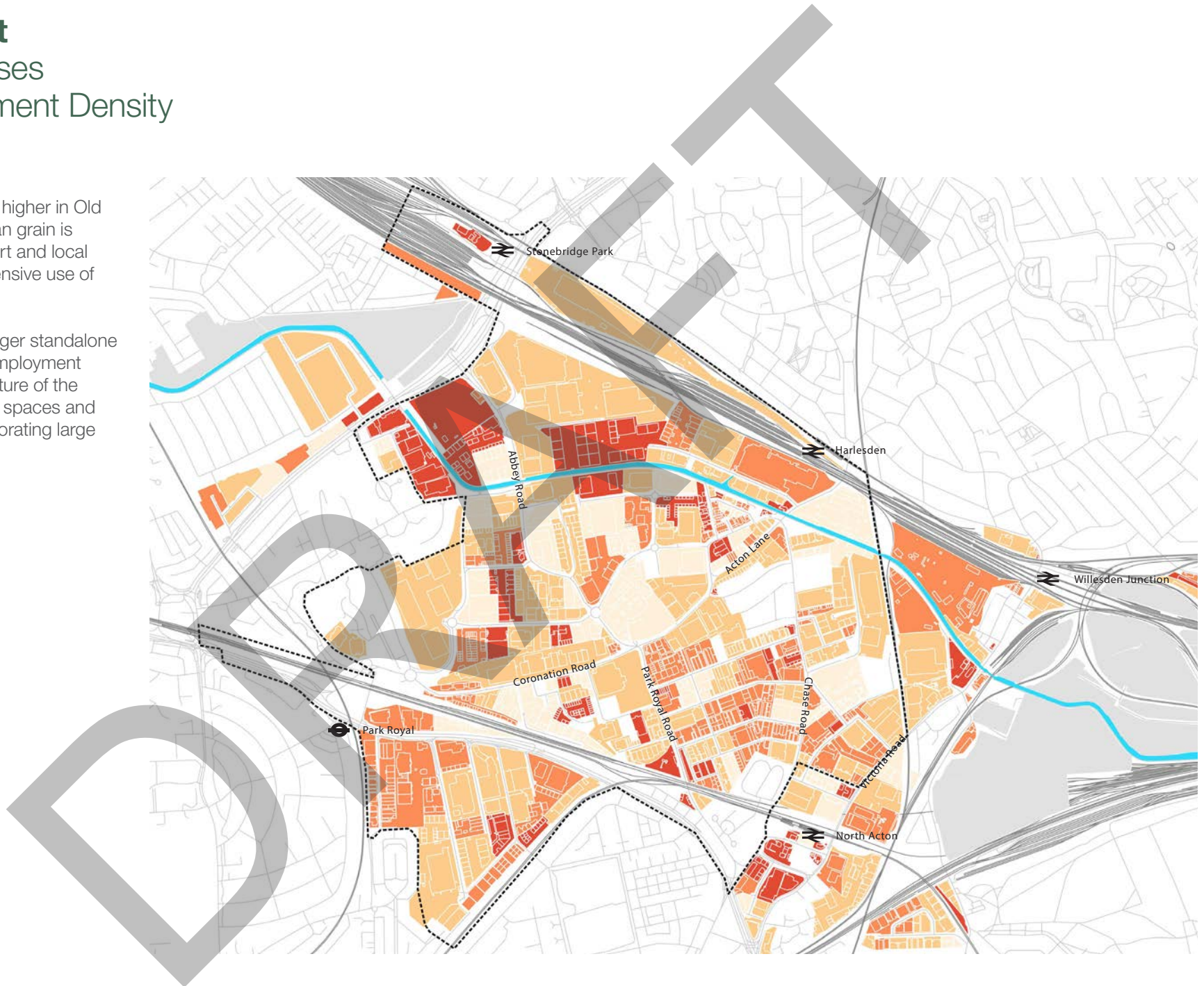
Areas of more modern, larger standalone warehouses have lower employment densities, reflecting the nature of the businesses that use these spaces and the inefficiencies of incorporating large industrial units on sites.

m2 per employee

Mapped using IRL database

Key

- < 30m /employee
- 30 - 40m/employee
- 40 -50m/employee
- 50+ m/employee
- Study area boundary



2 Context

2.3 Market

2.2.5 Market Research

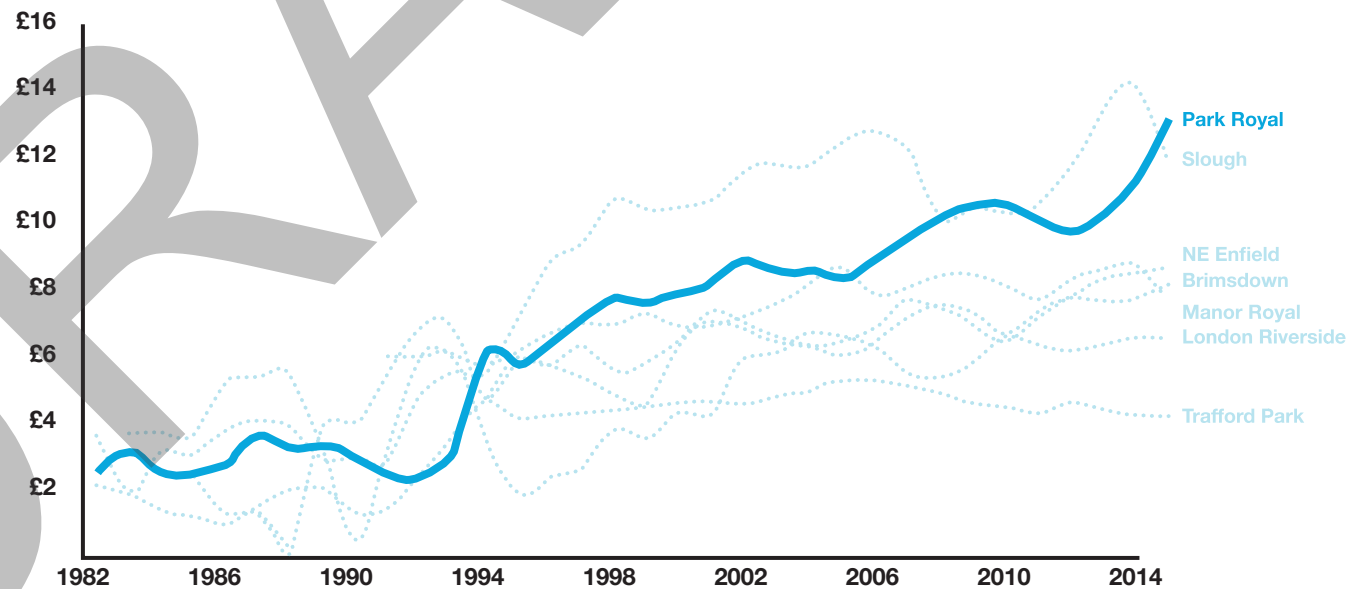
General Commentary on the Market

- Park Royal is a very popular location for industrial-based occupiers who serve London and need geographical proximity to function commercially.
- A lot of sites with the opportunity for redevelopment exist, however:
- Opportunities coming to the market are very scarce.
- Those opportunities that do come to the market (whether with or without buildings on them) are achieving values way beyond the conventional calculation based in investment value) – values achieved £2.75 - £3.5 million per acre – very high compared to other industrial location in Greater London.
- Particularly high demand for sites (with / without buildings) from owner occupiers. This is resulting in some very high values being paid circa and above £3 million per acre, often above the potential investment value achievable. Additional value being paid to secure sites.
- Industrial / B1c workshop without loading bays and yard space are not delivered by the market as they do not meet modern operational requirements which means also less attractive to investors. Properties built need to meet an investment standard which will make them tradeable therefore this is what developers deliver. New units delivered referred to as Grade A.
- Developers generally avoid delivering new smaller, multi small unit developments due to the higher management requirements which makes owning a property as an investment less attractive when compared with other employment investment opportunities. Larger units generally tend to have lower management requirements, more efficient use of

land and therefore realise better value whilst delivering where demand is highest. Therefore developers will always opt for this size unless there is a particular incentive to deliver small units. That said there are more enterprise-minded developers out there who will deliver smaller multi-unit schemes, to meet a gap in the market. However, they can find it challenging securing sites unless they are public sector assets which come with a specific remit, e.g. to support SMEs.

- Proximity of tube and rail stations key consideration for office occupiers (and therefore developers). This has an impact on investment decisions and therefore rent

willing to pay when comparing with alternative sites and locations. Developers may need to incentivise in other areas to attract tenants, e.g. rent free period or spec of fit out.



Year Rolling Average Rental Rates for Industrial Units (£/sqft)

2 Context

2.4 Spatial Policy

2.3.1 Policy Context

The Local Plan sets out measures to ensure Park Royal will continue to function as a crucial industrial area, and also determines the extensive change that will happen around the estate's periphery.

The development of Old Oak Common and the works associated with HS2 construction will have a significant impact on the areas to the east of Park Royal.

The re-composition of the uses and connectivity through these transformations offers potentials that could encourage intensification, particularly associated with better transport connectivity, new businesses and a well skilled population.

It is critical, therefore to increase employment density in areas that can take advantage of these changes.

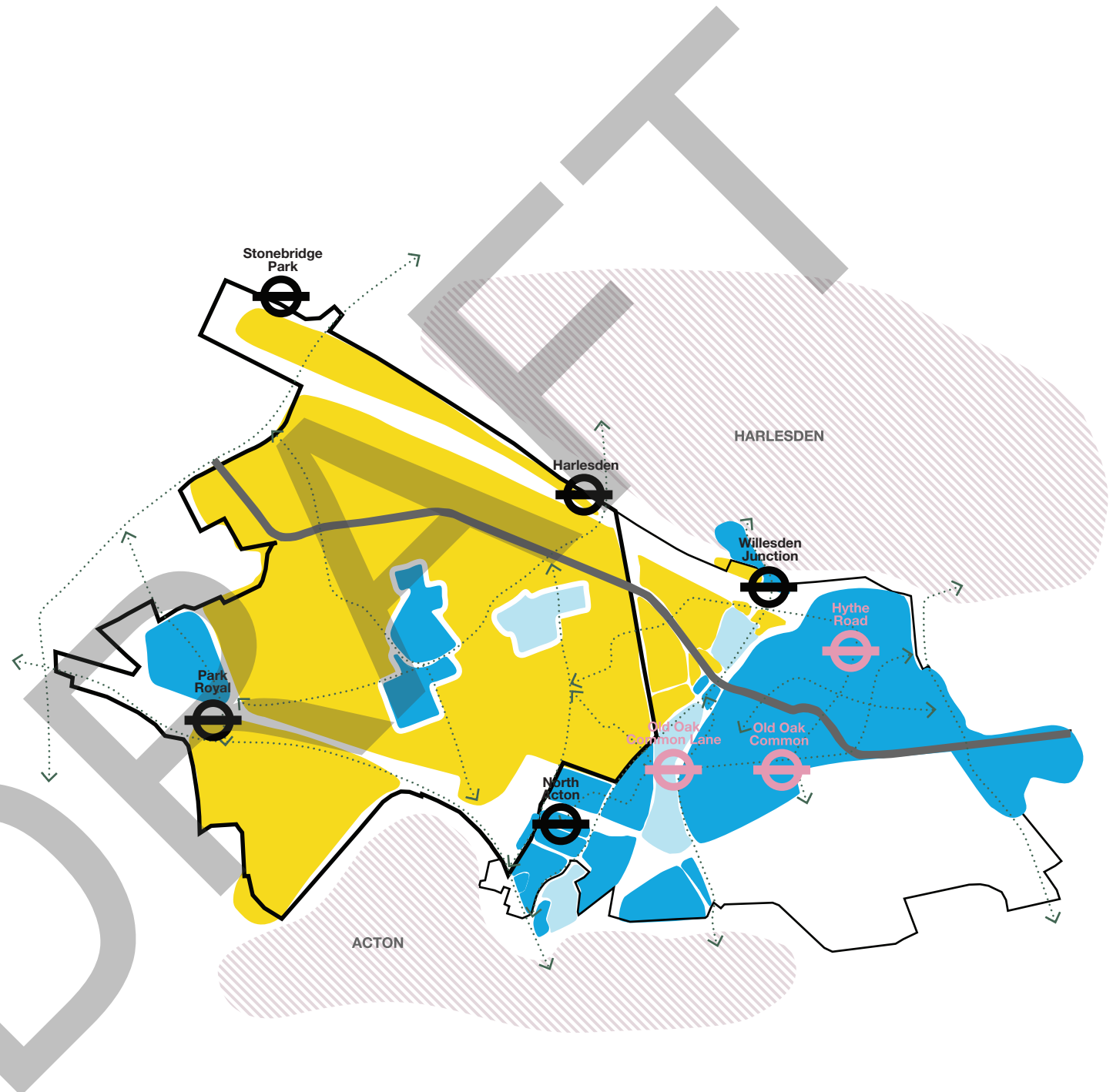
Park Royal currently has a poor number of employees within a commutable travel time, which is identified as a weakness in the Industrial Estate Research Study (2016).

 Existing residential areas

 Industrial uses

 Mix of uses

..... Key Routes



2 Context

2.5 Future Business Growth

2.3.2 Future Growth Sectors Study

Based on the baseline research a number of key sectors have been identified. While these vary significantly in terms of their size, they are all activities which either currently define the OPDC economy, or / and which could contribute to future aspirations for economic growth, diversification and placemaking in the area

Existing economic strengths are largely in industrial type activities, in particular food manufacturing, transport, wholesale, logistics and to a lesser extent, motor trade activities. The area also appears to have growing strengths in a range of creative industries. There are opportunities to retain, strengthen and diversify these sectors.

Spatial Recommendations

The spatial requirements of each sector identified in the Future Growth Sectors Report will play a role in the future grain and distribution of space typologies in Park Royal in the coming years.

Although each sector has specific requirements, parts of Park Royal appropriate for these sectors define a number of areas, summarised below

1 Old Park Royal

Craft/artisan manufacturing and shared maker spaces. Small wholesale activities, smaller creative businesses, shared workspaces and flexible B1c units

2 Western Periphery

Larger logistics activities, and car retail dealerships near strategic routes

3 Channel Gate

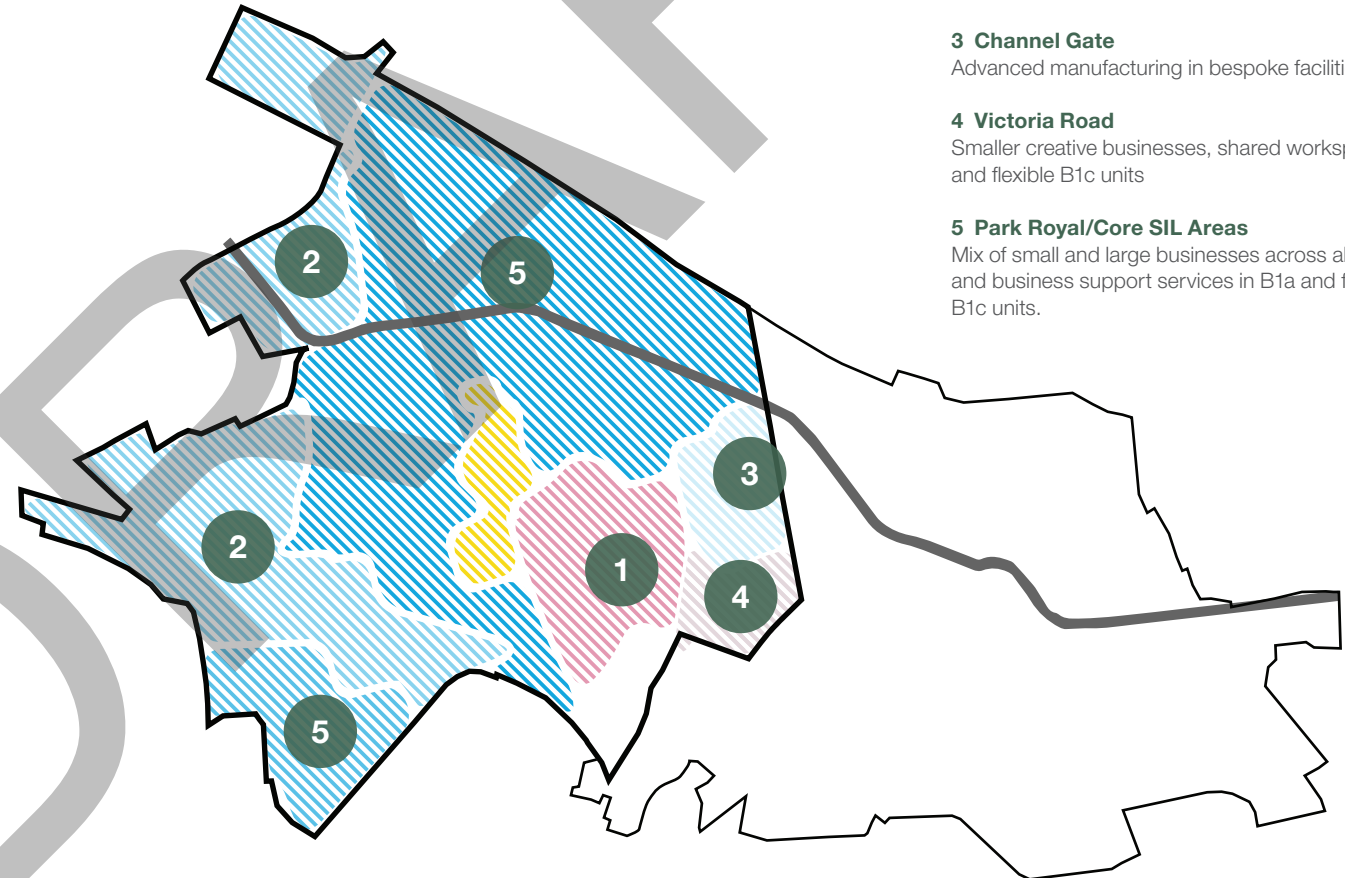
Advanced manufacturing in bespoke facilities

4 Victoria Road

Smaller creative businesses, shared workspaces and flexible B1c units

5 Park Royal/Core SIL Areas

Mix of small and large businesses across all sectors and business support services in B1a and flexible B1c units.



Regeneris
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In addition, a number of new sector opportunities have been identified. The nature of development at Old Oak Common means that future growth is likely to be focused around office uses such as professional and financial service, ICT and digital media sectors. There are also potential opportunities within the low carbon (including clean tech), higher value manufacturing sectors and med-tech activities.

2 Context

2.5 Future Business Growth

2.4.1 Employment Target

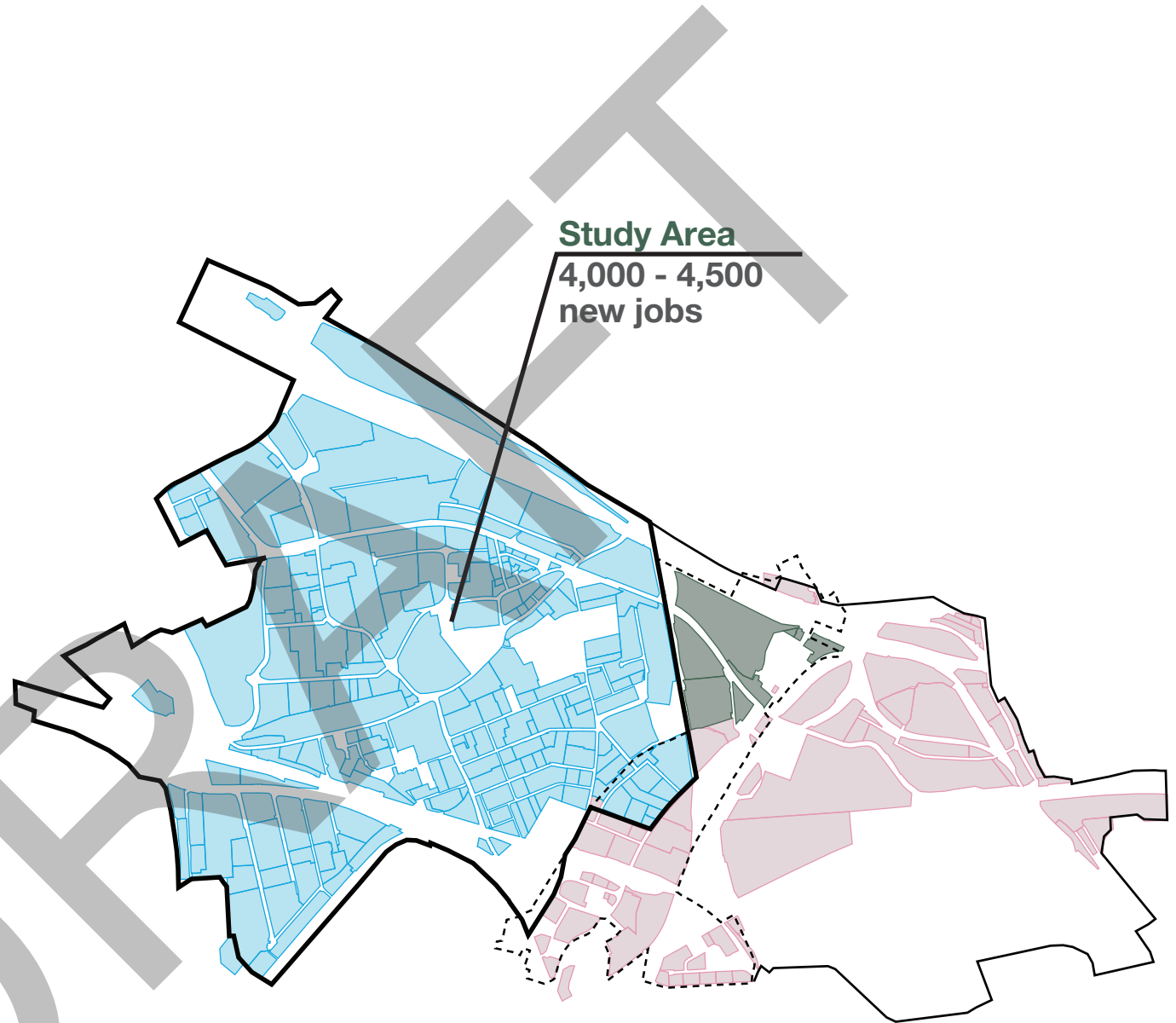
36,000

Total estimated jobs within OPDC.

The study will provide a strategy consistent with the London Plan target of the provision of an additional 10,000 new jobs at Park Royal.

The study area excludes parts of Park Royal that will be utilised for HS2 construction compounds until 2026. As a significant amount of jobs are anticipated to be delivered on these sites, this study aims to deliver 4,000-4,500 within the study area.

As there are few open development sites within Park Royal, and the OPDC is not a major landowner in this area, this study will pursue design approaches that encourage incremental growth to deliver this uplift in employment densities



Areas

 Park Royal study area

 SIL outside study area

 Non industrial land

 OPDC Boundary

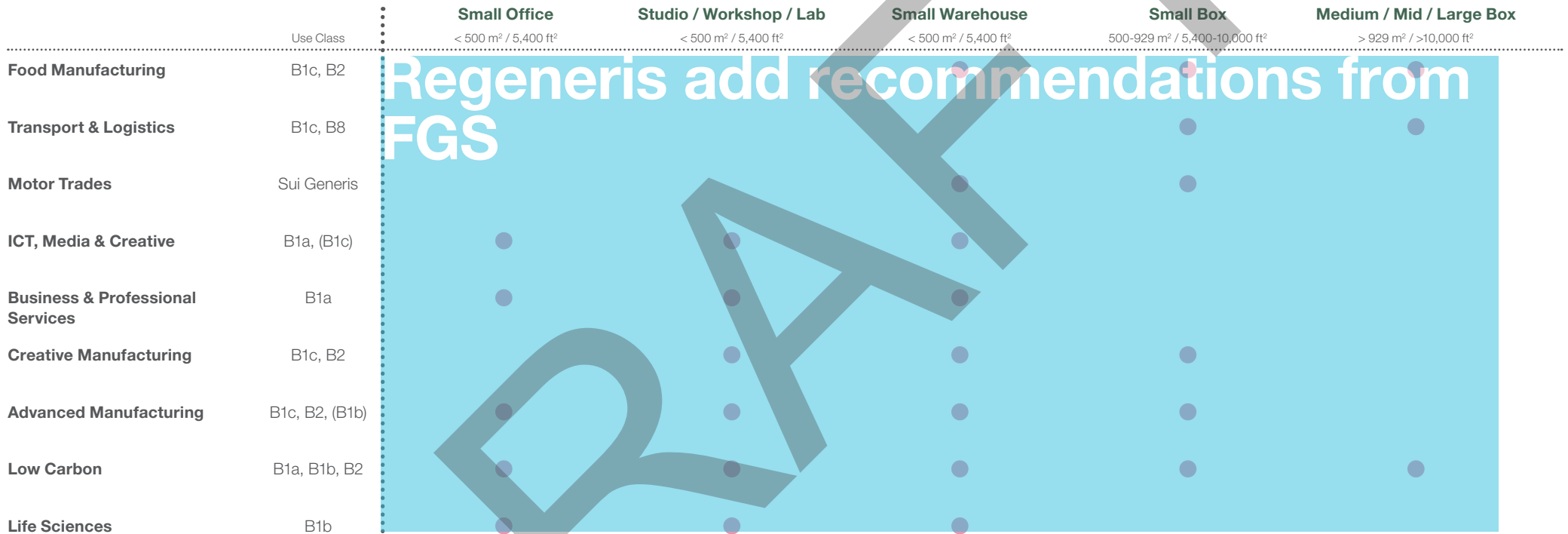
 Victoria Road and Old Oak Lane

2 Context

2.5 Future Business Growth

2.4.2 Future Growth Sectors

Future Growth Sectors



Regeneris add recommendations from FGS

Spatial Recommendations

The spatial requirements of sectors highlighted in the Future Growth Sectors Study show that a range of spaces required. The intensification strategies developed must therefore be broad and ensure that a diversity of space is provided.

This study should encourage the delivery of a range of types of flexible workspace for SMEs in line with sector

aspirations.

The study also demonstrates that sectors forecast to grow in the short term (Food Manufacturing and Transport and Logistics) prefer larger units, whereas those forecast to grow further into the future (2023 onwards) prefer smaller space.

As such, the demand for these space may not be

reflected in the current market profile, but intensification strategies should take into consideration this medium term potential for sector growth.

2 Context

2.5 Future Business Growth

2.4.2 Future Growth Sectors

Future Growth Sectors	Job number	Business Number	Jobs vs Business % Jobs / Businesses	Employment Density (m2/employee)	Policy Off Scenarios		Policy On Scenarios: OPDC Proactive Planning		
					Based on past 5 year trends in London	Based on range of employment projections	Considerations	Indicative Scale of change for OPDC	Timescale
Food Manufacturing	4,400	50			+900	-1,500 to -1,600	SIL protection	Growth 500 to 1,000	2017 to 2037+
Transport & Logistics	12,900	420			+900	-500 to -1,800	SIL protection	Growth 500 to 2,000	2017 to 2037+
Motor Trades	1,700	120			-260	-200 to -300	SIL protection	Stable or Small Decline	2017 to 2027
ICT, Media & Creative	6,700	290			+2,000	+1,300 to +2,500	HS2 & Old Oak	Greater than +10,000	2028 to 2037+
Business & Professional Services	9,200	600			+1,400	+1,500 to +2,900	HS2 & Old Oak	Greater than +10,000	2028 to 2037+
Creative Manufacturing	300	25			0	0 to -100	SIL protection proximity HEI	Up to 1,000	2023 to 2037+
Advanced Manufacturing	900	5			-200	-200 to -500	SIL protection proximity HEI	Up to 1,000	2023 to 2037+
Low Carbon	1,300	50			-	-	Proactive Planning	tbc	tbc
Life Sciences	50	10			-	-	Development across London	unknown	2023 to 2037+

Regeneris add recommendations from FGS

Future Scenarios

Food manufacturing presents and opportunity for employment growth at high densities in the short term, and therefore offers the most likely source of industrial intensification based on current market conditions.

Section B Intensification Strategy and Principles

DRAFT

3 Intensification

We have developed a data-driven method to identify sites where industrial intensification will be most effective and most deliverable.

- 1.1 Intensification Strategy
- 1.2 Intensification Types
- 1.3 Site Identification

3 Intensification

3.1 Intensification Strategy

3.1.1 Key Drivers

Employment Density

Multi-Storey Typologies

Although currently uncommon in industrial areas in the UK, multi-storey typologies can deliver significant uplift in employment density.

Where site conditions allows stacking of small industrial spaces on larger industrial spaces can maintain the ecology of businesses in Park Royal whilst growing the employment capacity of the area.

Where site conditions do not allow for viable or feasible multi-storey industrial typologies introducing B1 uses on upper levels can maximise the capacity of sites, and create significant uplift in additional employment capacity.

Location

Employment density can be uplifted through exploiting the potentials of specific parts of Park Royal.

A clear opportunity is to exploit sites with good PTAL, where occupiers with large workforces are likely to be willing to locate.

Existing high density clusters, such as business centres can be extended, providing more space in locations that are already desirable locations and offer incentives for businesses to work in closer

proximity.

Although B1 uses create high densities of employment, it is also crucial to ensure B2 space is retained in smaller sites in Park Royal, as these sites are likely to attract manufacturing activities.



High density workspace, Munich

3 Intensification

3.1 Intensification Strategy

3.1.1 Key Drivers

Delivery of Viable Space

Industrial space is the most viable space in Park Royal due to rental strong values achievable relative to the cost to build for new space. Industrial space is conventionally delivered as single storey buildings particularly on small to medium size plots. Industrial developments of 2 storeys and above are still rare, in the UK as it requires a very large site to achieve building cost economies of scale and very strong industrial values to cover the higher cost of building resulting from the more substantial building structures required to support upper storey loads.

Delivering new office space is currently unviable due to values not supporting the cost of building, particularly for multi-storey space above 2 floors. However, it can be delivered alongside a higher proportion of value generating industrial space.

Another key consideration for intensifying all employment space is – in addition to the cost of more substantial structures – is the requirement for additional passenger lifts, loading lifts and vehicle ramps required to service buildings to the same level as comparable single storey buildings. This is critical to ensure they are attractive to tenants, with little or no loss of rents and same length of term achievable.

This also has a bearing on how attractive a development is as an investment. Value generating industrial space can accommodate the cost of providing additional servicing but needs to be of sufficient scale and a high proportion of a development on a given site.

The delivery of new industrial and office space must not compromise the proportion of land given over to yard space and car parking otherwise tenants will not take new space. This would negatively impact on viability through lower rental values.



Large-scale multi-storey development, Heathrow

3 Intensification

3.1 Intensification Strategy

3.1.1 Key Drivers

Place

Architectural Approaches

Creating more jobs in Park Royal relies on making it a location businesses would like to locate. Attracting business can be helped through an improved urban realm.

Architecturally, a great deal can be done to improve the experience of moving through Park Royal. Better frontages can be created through ensuring building entrances are located directly on streets and allowing buildings to form the boundary of sites.

Park Royal's heritage buildings can be refurbished to build upon the industrial heritage of the area, building a distinctive character.

Urban Approaches

At a strategic level, creating different types of streets further enhances the architectural approaches described above. Distinguishing streets that are used to service buildings from those where pedestrian movement, visitor journeys, amenity space and food and beverage uses are located can create a much better urban environment which attracts businesses to the area and improves employee welfare.

Consolidating service yards, freeing up frontages elsewhere for public facing activities can deliver this.

Exploiting amenity spaces such as the canal, parks and vegetation is an opportunity to improve the urban experience of Park Royal.



Pedestrian friendly industrial urban fabric, Barcelona

3 Intensification

3.1 Intensification Strategy

3.1.2 Types of Intensification

Intensification

For the purposes of this study, industrial intensification is considered to be an increase in employment densities across Park Royal.

However, intensification can be considered in other forms, such as an increase in the mix of uses, a more active public realm, increases in productivity, and increases in efficiencies of land-use and industrial processes.

Whilst the driving metric for this study will be employment densities, this can also be aligned with broader intensification through co-location, shared facilities, agglomeration effects and so on.

Increasing employment densities requires a broad strategic approach, particularly in accommodating the higher concentration of pedestrians, car journeys and service vehicles.

Process Increasing efficiency through improvements to technologies used, or through sharing facilities to maximise use



Shared workshop, Hackney

Economic Changing type of accommodation to attract higher value added uses



High value manufacturing, Brooklyn Navy Yards, New York

Spatial Increase intensity of landuse



Multi-storey industry, Theydon Road, Hackney

Urban Improve contribution to quality of urban realm



Positive frontage, Herman Miller, Melksham

3 Intensification

3.1 Intensification Strategy

3.1.3 Opportunities

Ageing building stock Some areas have many buildings coming to the end of their lifespan, creating opportunities for redevelopment.



Sharing facilities Efficiencies created through sharing facilities are becoming more common, incentivising intensive use of space and bringing new arrangements for managing sites.



Variation A wide variation in building and site typologies across Park Royal presents a range of possibilities for intensification.



Low rise urban fabric Existing stock mainly 1-2 storey buildings, ensuring multi-storey typologies present opportunity for an increase in densities.



3 Intensification

3.1 Intensification Strategy

3.1.4 Constraints

Low vacancy With little vacant land available in Park Royal new intensive typologies must replace existing buildings, and take into consideration costs and values generated.



High private ownership Intensification will depend on individual landowners developing sites.



Existing building stock Existing building stock is mainly of secondary and tertiary quality, meaning that incremental development which seeks to retain existing buildings may be commercially challenging.

Residual land fragmented Spaces around existing buildings irregular in shape, creating challenges in providing standardised spaces through incremental intensification such as horizontal extension and infill.



3 Intensification

3.2 Intensification Types

3.2.1 Spatial Intensification

The following pages sets out the intensification types and how case study sites have been selected.

A number of opportunities exist for intensification in Park Royal, from the incremental to the comprehensive. These are set out in the table opposite.

Specific spatial conditions make each intensification type feasible on certain sites, and likewise the incentives and risks for redevelopment vary accordingly.

As such, there is no singular way to determine whether a site is appropriate for redevelopment- the way sites are identified must suit the type of intensification envisaged.

Therefore, a number of indicators are used to select sites based on the spatial conditions and incentives associated with each intensification type. These indicators are set out on the following page.

Once a number of sites are located which match the conditions for intensification, this is narrowed down to a number of case studies through assessing the likely commercial viability of redeveloping these sites, set out on page 36.

Intensification Type	Suitable Site Type	Incentive for Development	Risks
Vertical Extension	Spatially constrained sites	Increase in floor area	Impacts on current occupiers staying operational. Dependant on structural capacity of existing building.
Horizontal Extension	Sites with underutilised space	Increase in floor area, with the capacity to extend existing site operation	Fewer opportunities across Park Royal due to high density
Infill	Sites with large amounts of unutilised/underutilised space	Increase in floor area with minimal impact on existing occupants	Few opportunities across Park Royal due to high density
Internal Subdivision	Buildings with sufficient eave heights to accommodate mezzanine floors	Increase in floor area without significant structural modifications to existing building	Significantly changes the nature of accommodation possible within building, but maybe useful for buildings which have been experiencing long void periods.
New Provision on Vacant Land	Vacant sites	Provision of high density, high quality accommodation suiting market demand	Few opportunities across Park Royal due to low vacancy rates, but may become more important as buildings reach end of their life.
Comprehensive Redevelopment	Large sites under single ownership	Significant upgrade in quality of accommodation and floor area	Requires strong actor to carry risk of large redevelopment, but may become more important as buildings reach end of their life.

3 Intensification

3.3 Site Identification

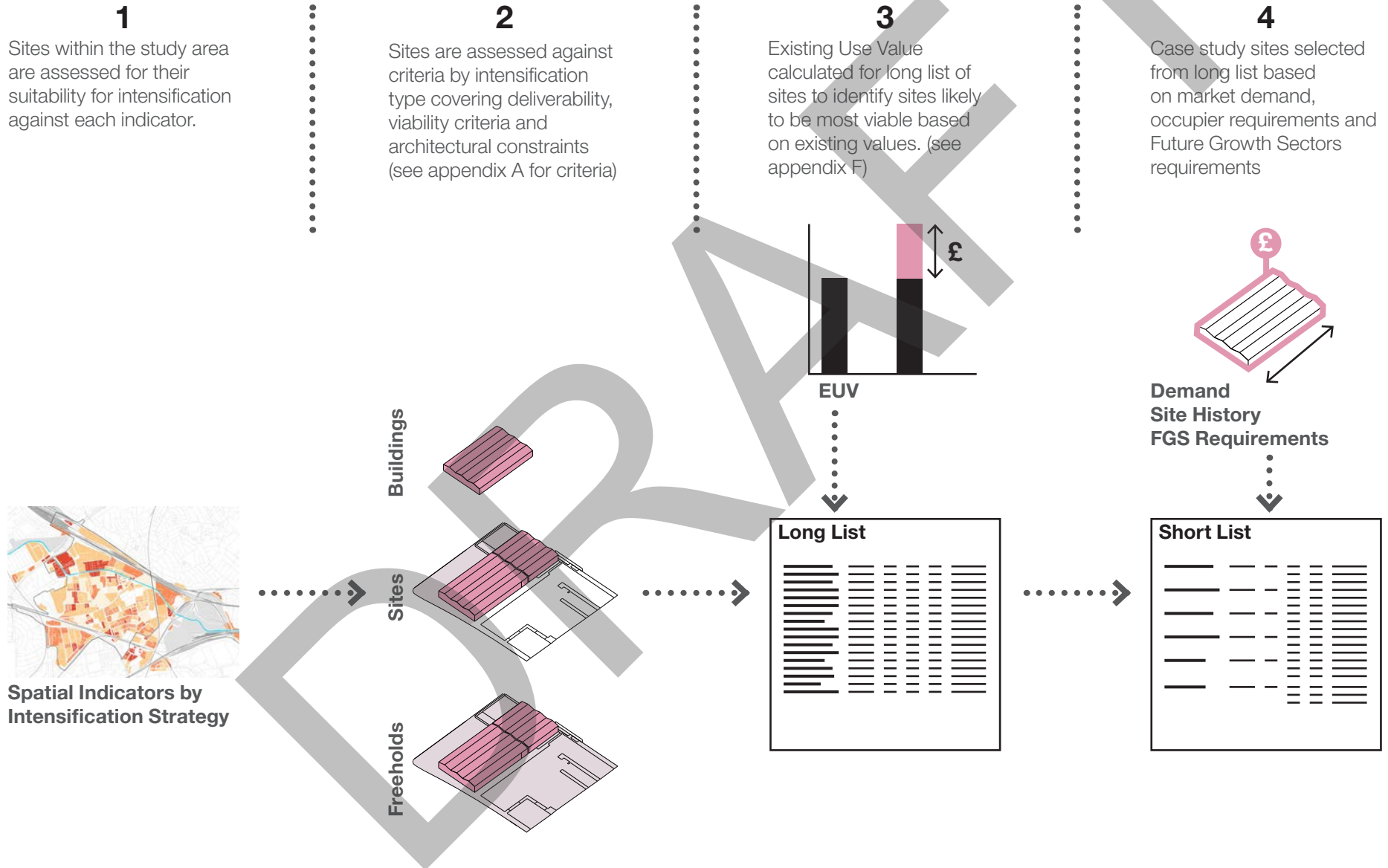
3.3.1 By Intensification Type

Spatial Characteristic	Indicator	Intensification Type				
		Horizontal Extension/Infill	Vertical Extension	Internal sub-Division	New provision / Comprehensive Re-development	New Development on Vacant Land
Large proportion of site not used for operational uses	Area Efficiency Source: ILR Data Business, Park Royal Atlas	●				
Low buildings not exploiting potential for multiple storeys	Floor to Area Ratio Source: ILR Data Business, Park Royal Atlas	●	●			
Height of building/eaves offer potential for mezzanine level	Volume Efficiency Source: ILR Data Business, Park Royal Atlas Building Height, EMU Analytics			●		
Multiple buildings under single ownership potential for phased, redevelopment of large sites	Buildings per Freehold Source: Freeholds, Park Royal Atlas				●	
Vacant site available for new development	Vacant Sites Source: Park Royal Atlas					●
Location could support significant increase in employment densities	PTAL TfL	●	●	●	●	●
Location appropriate for Future Growth Sectors	Future Growth Sectors Future Growth Sectors Report, OPDC		●	●		

3 Intensification

3.3 Site Identification

3.3.2 Site Identification Work Flow



3 Intensification

3.3 Long List

3.3.3 Selected Sites by Site Type

- Standalone warehouse
 1. Ryder, Abbey Road
 2. HSS Hire, Abbey Road
 3. Willen Field Road
 4. Gorst Road
 5. Waxlow Road
 6. Brooks Packaging Ltd
 7. Nucleus Business Park
 8. John Lewis Depot

- Industrial estate
 9. Grand Union Trading Estate
 10. Space Business Park
 11. Bush Industrial Estate
 12. 97 Victoria Road
 13. Kendal Court
 14. Westwood Park

- Dense industrial
 15. Park Royal Fire Station
 16. 40 Minerva Road
 17. Alliance Court

- Open industrial land
 18. Twyford Tip
 19. 56A Minerva Road
 20. Western road

- Business centre
 21. Alpha Beta Centre
 22. Premier Park

- High street type
 23. Abbey Manor

- Vacant lot
 24. Bashley Road

- Study area boundary



3 Intensification

3.3 Long List

3.3.4 Selected Sites by Intensification Method

- Horizontal Extension
 - 23. Abbey Manor
 - 6. Brooks Packaging Ltd
 - 7. Nucleus Business Park

- Vertical Extension
 - 2. HSS Hire
 - 12. St Lenoard's
 - 16. 40 Minerva Rd
 - 17. Alliance Court
 - 21. Alpha Beta Centre

- Vertical / Horizontal Extension
 - 3. Willen Field Road
 - 5. Waxlow Road
 - 15. Park Royal Fire Station

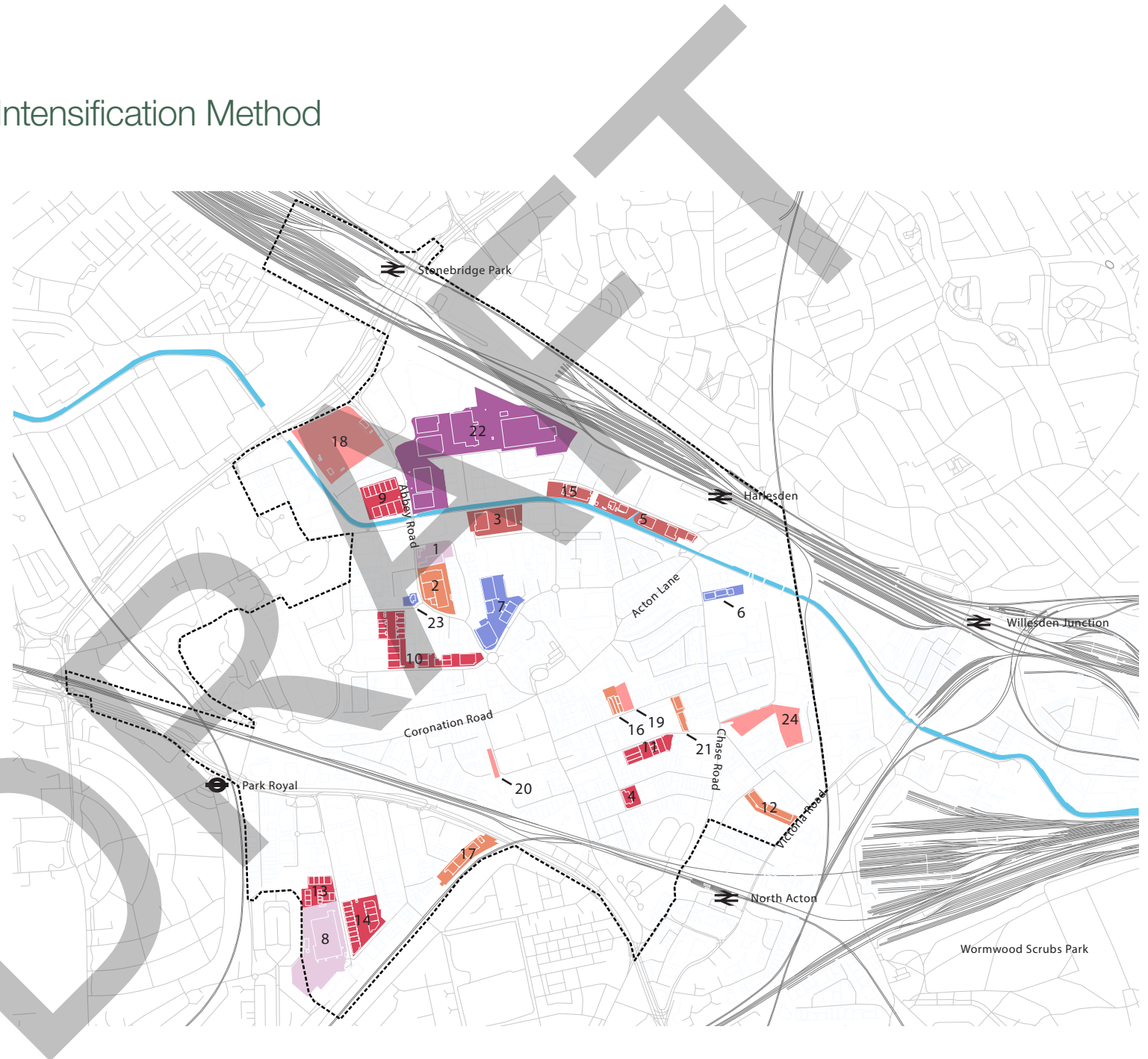
- Infill
 - 1. Ryder
 - 8. John Lewis Depot

- Internal Subdivision
 - 22. Premier Park

- New Provision on Vacant Sites
 - 18. Twyford Tip
 - 19. 40-54A Minerva Road
 - 20. Western Road
 - 24. Bashley Road

- Comprehensive Development
 - 4. Gorst Road
 - 9. Grand Union Industrial Estate
 - 10. Space Business Park
 - 11. Bush Industrial Estate
 - 13. Kendal Court
 - 14. Westwood Park

- Study area boundary



3 Intensification

3.3 Long List

3.3.5 Selected Sites by Site Type

Other applicable sites either outside of study boundary or outside of SIL boundary

Selected sites by site type

- Standalone warehouse
- A. Superhire
- Industrial estate
- B. Savoir Beds
- C. Goodhall Street
- D. Victoria Industrial Estate
- Business centre
- E. Cowork Hub
- Vacant lot
- F. Victoria Rd
- Hotel or standalone office building
- G. Old Oak Common Ln
- Retail Park
- H. Asda
- Study area boundary



4 Typologies

The following case studies test the future employment capacity potential on each selected site.

- 4.1 Design Principles
- 4.2 Case Studies
- 4.3 Viability Summary

4 Typologies

4.1 Design Principles

The intensification of industrial fabric requires new approaches to design, both at the individual site level and at the urban scale.

The following principles can be applied of sites of varying scales across Park Royal to ensure that intensification is feasible and viable.

These principles inform the design development of exemplar case studies that reflect the employment density, viability and placemaking set out in section 3.

They are principles that can be applied to the wide variety of typologies that will be required to achieve significant uplift in employment numbers across the study area.

Intensify

Creating a more intensive use of land in Park Royal can be achieved through **stacking** industrial building types into multi-storey developments.

Sharing facilities wherever possible also provides incentives for businesses to work in closer proximity, and liberating space for further development.

Create Value

Incorporating a wider variety of space types into new typologies requires that the value of this space is maximised.

Separating access for different space types, **exploiting high transport accessibility** and **creating better places** can all ensure that the value is created to incentivise intensification.

Encourage

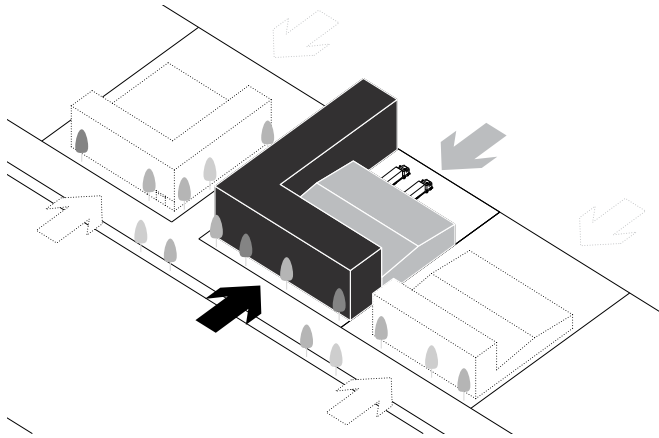
Overcoming the inertia to redevelopment of sites can be encouraged through **phased redevelopment**.



4 Typologies

4.1 Design Principles

4.1.1 Separate Access



Design Principle 1: Separate Access

Increasing the mix of space types on sites needs to be reconciled through separating different types of access, typically servicing and visitors/employees.

Typical Applications

- Dedicated entrance to office space directly off street
- Distinction of roads predominantly servicing industrial units from key pedestrian routes
- Clustering of office entrances



Existing condition

Entrances for servicing, office access, visitors and food and beverage uses are intermixed along a street.



Create distinct street types (Poligon Industrial del Beson, Barcelona)

Distinguishing between servicing and pedestrian friendly streets creates a more articulated public realm.



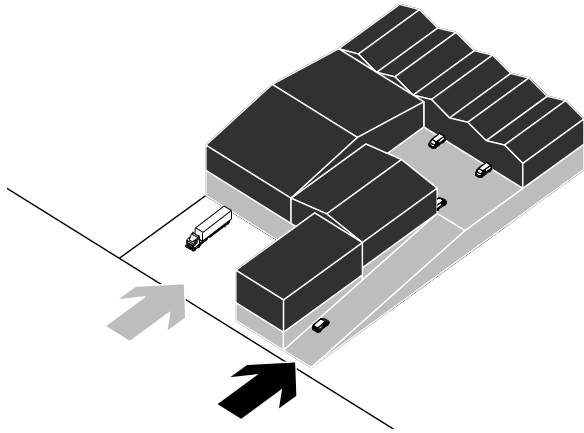
Positive frontage (Donostia - San Sebastian)

More pedestrian friendly streets are more attractive to occupiers, encouraging demand for intensified sites.

4 Typologies

4.1 Design Principles

4.1.2 Stack Uses



Design Principle 2: Stack Uses

Increasing floor space across Park Royal whilst maintaining a mix of space that provides for current and future businesses and does not compromise the area's SIL designation requires providing industrial spaces on upper storeys.

Typical Applications

- Vehicle ramp providing access to upper floors
- Separation of space requiring access for smaller goods vehicles from space requiring HGV access
- Use of goods lifts to provide servicing for light industrial spaces on upper floors
- Provision of B1 uses above industrial uses



Existing condition

Predominant industrial typologies provide industrial space at ground floor. Where present, upper storeys are generally office space.



Multi-storey industry (Edificio Belasco - Irun, Spain)

Ramps provide access for service vehicles, enabling industrial space to be accommodated on first floor.



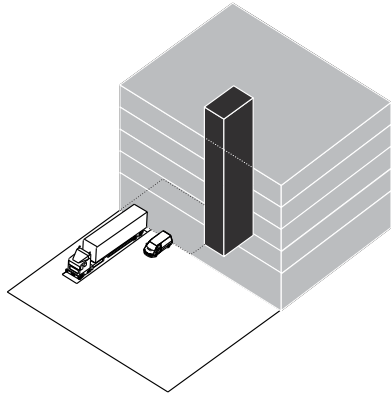
Small over large (Belartza, Donostia-San Sebastian)

Stacking different sizes of space maintains a varied employment offer.

4 Typologies

4.1 Design Principles

4.1.3 Share Facilities



Design Principle 3: Share Facilities

Sharing of facilities can create more efficient, intensive use of space. Facilities for loading, storage, meeting space can be pooled and booked as required, allowing these facilities to be of a much higher quality and be more intensively used throughout the day.

Typical Applications

- Shared loading bays
- Goods lifts serving multi-storey light industrial space
- Consolidated office space sharing reception and circulation space



Existing condition

Small industrial units have individual, separate loading access within minimal external space for loading.



Shared Fab Lab (Chips Building, Manchester)

Distinguishing between servicing and pedestrian friendly streets creates a more articulated public realm.



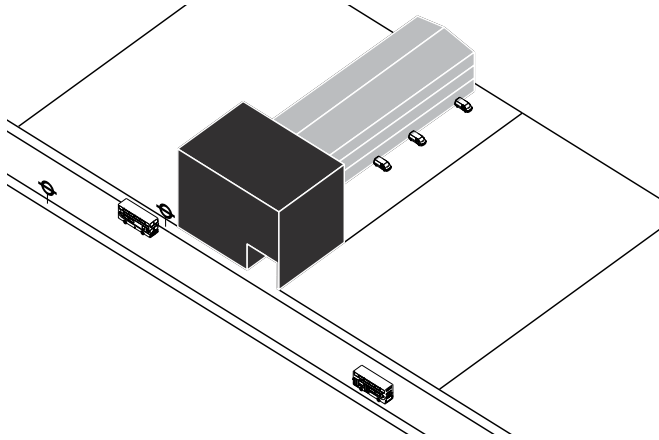
Shared facilities (RDM Rotterdam)

Shared loading yard, fabrication facilities, assembly space and office space are available to tenants on a timed basis.

4 Typologies

4.1 Design Principles

4.1.4 Exploit Accessibility



Design Principle 4: Exploit Accessibility

Increasing density in areas with good transport accessibility is vital to attracting occupiers. As well as ensuring that the space is marketable, this will also mitigate the impacts of increased traffic due to higher density of employment in Park Royal.

Typical Applications

- Location of high employment densities along bus routes and near tube/overground stations
- Location of B1 uses around perimeter of sites
- Maximise visibility of entrances



Existing condition

Areas with good access to public transport, such as Old Park Royal.



Intensive Workspace (Netil House, Hackney)

Good transport accessibility presents the opportunity for large buildings offering intensive mix of workspace



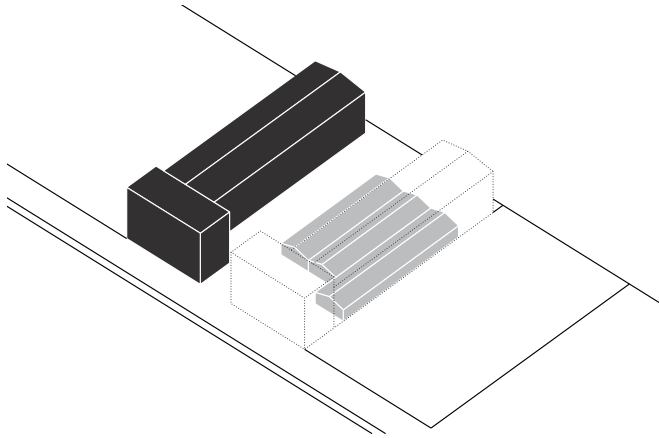
Campus (HereEast, London)

High density employment enabled through good pedestrian routes between workspace and public transport.

4 Typologies

4.1 Design Principles

4.1.5 Phase Redevelopment



Design Principle 3: Phase Redevelopment

Redevelopment can be phased to ensure owner occupiers can stay operational through construction.

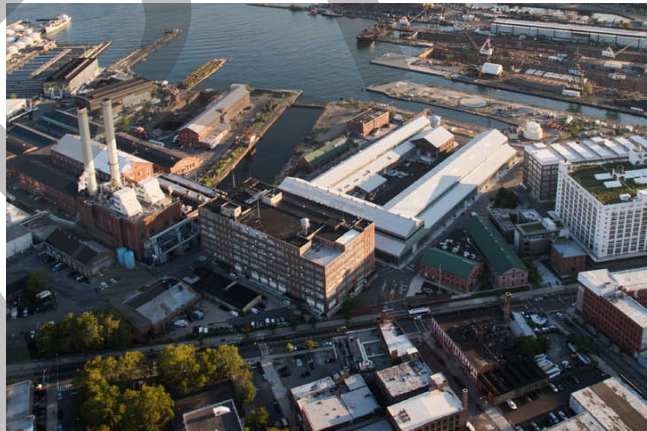
Typical Applications

- Strategic infill of low density sites allowing decant of businesses
- Redevelopment of sites with multiple buildings within a single Freehold
- Comprehensive redevelopment with adjacent sites through land assembly



Existing condition

Dense industrial fabric has little space for redevelopment whilst the existing buildings remain operational.



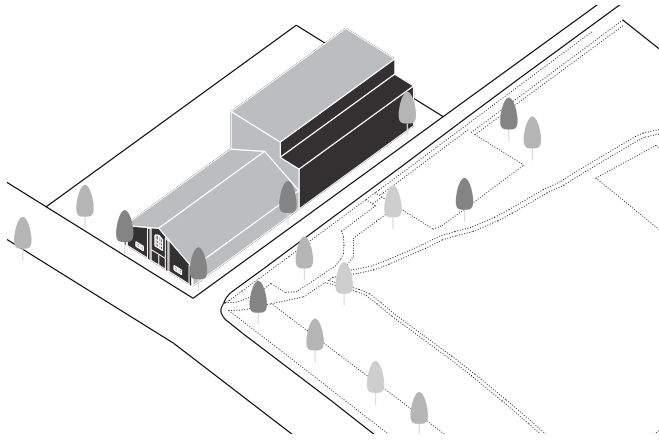
Infill (Brooklyn Navy Yards, New York)

Strategic insertion of new buildings create high density employment space and catalyse refurbishment of industrial buildings in the area.

4 Typologies

4.1 Design Principles

4.1.6 Placemaking



Design Principle 3: Placemaking

Attracting new occupiers to Park Royal will require strategies to improve the quality of the urban environment, such as improving the setting of existing heritage assets, creating positive street frontages and exploiting opens spaces.

Typical Applications

- Allow building to form boundary of sites, removing need for fences
- Improve the setting and quality of heritage buildings
- Exploit views and access to green spaces and the canal
- Locate entrances to buildings directly on streets
- Locate yards and servicing at rear of sites



Existing condition

The urban environment is dominated by fences and car parking.



Industrial fabric (Hackney Wick, London)

Re-purposing older industrial buildings can create value through attracting creative industries to the area.



Exploit Amenity (Hackney Wick, London)

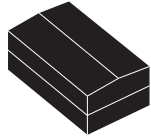
Spaces such as the canal and existing green spaces can add value to adjacent developments and encourage a greater mix of uses.

4 Typologies

4.2 Case Studies

4.2.1 Willen Field Road

4.2.1.1 Site Selection



**New Provision
on Vacant Plot**

Address 4-6 Willen Field Road
Postcode NW10 7AQ
PTAL 1a

Boundary Freehold
Business Greencore
Site Type Standalone Warehouse
Building Type Large Industrial
Site Area 4,978 m²
Footprint
EUV Cap

Site History

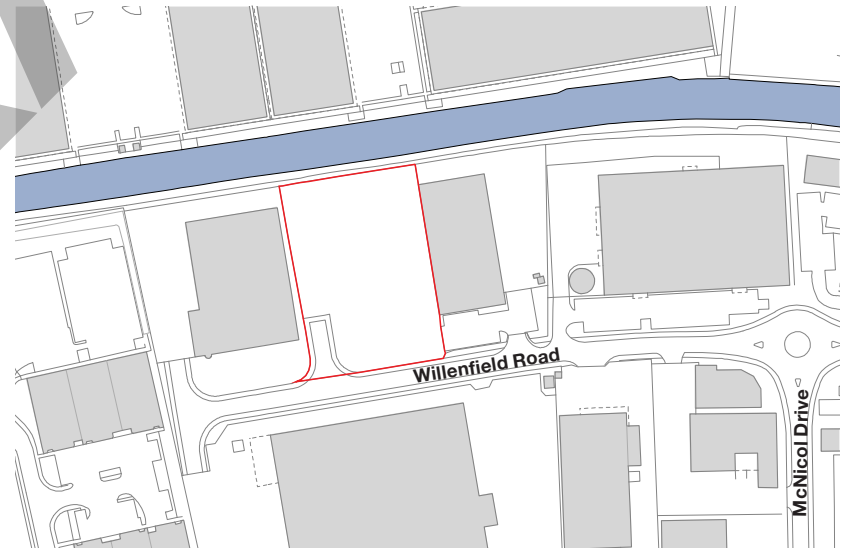
The site is currently vacant, with planning approval for proposed industrial/warehouse building with ancillary offices (flexible B1(c) / B2 / B8 uses) consisting of approx. 2,462 sqm GEA of warehouse, 309 sqm GEA of office.

Site Selection

The site sits between two existing standalone warehouses under the same ownership. The freehold was identified as having a low area efficiency due to the vacant plot.

Development Objectives

Although the adjacent sites is under a single ownership, the existing buildings are considered to be of a high quality, and therefore the development will consider how a higher employment density can be achieved on the vacant plot beyond the density the approved scheme on the site.



4 Typologies

4.2 Case Studies

4.2.1 Willen Field Road

4.2.1.2 Existing Site



View from Willen Field Road

The existing site looking to the north east.



View from Willen Field Road

The existing site looking to the north west.

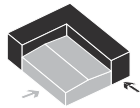
4 Typologies

4.2 Case Studies

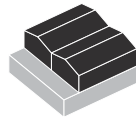
4.2.1 Willen Field Road

4.2.1.3 Mix and Space Requirements

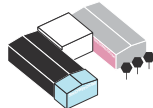
**Design Principle 1:
Separate Access**



**Design Principle 2:
Stack Uses**



**Design Principle 6:
Placemaking**



Use Class	Justification
B1a	Office space ancilliary to industrial uses. Additional office space could exploit views and access to canal.
B1c	Combined with B1c, workshop/atelier typologies can explote views and access to the canal, and good access for service vehicles.
B2/B8	Location suitable for industrial uses, but low PTAL is not suitable for other uses.

Typology	Justification
Medium Warehouse	Size and proportions of site suitable for medium-box industrial units
Workshop/ Atelier	Access for service vehicles can be exploited to maximise the capacity of the site with higher density workspace.
Small Office	Large site allows for separation of access to office

Typology Requirements

For spatial/operational requirements for each typology, please refer to appendix B.

	Key Design Considerations
Place making	The building should create a better frontage onto Willen Field, which is currently dominated by car parking and fences. The development should take advantage of the access and amenity of the canal to the north of the site.
Viability	In addition to the industrial nature of the surrounding area and low amenities, the low public transport accessibility level of this site contributes towards making the site challenging to attract B1 occupiers. Multi-storey industrial typologies could create opportunities to increase the total floor area achievable due to the size and shape of the site. However, intensification through adding additional storeys increases construction costs through requiring a more substantial structure and vertical circulation (lifts and ramps etc).
Employment Density	Multi-storey industrial typologies can create a significant intensification of this land, and hence creating a potential uplift in job capacity.

4 Typologies

4.2 Case Studies

4.2.1 Willen Field Road

4.2.1.4 Precedents



Stacked Industry (Theydon Road, Hackney)

Smaller industrial units are stacked above larger units through the provision of a ramp serving multiple units at first floor level.



Canal Access (White Building, Hackney)

Proximity to the canal can be exploited to create higher value workspace and improve amenity for workers.



Flatted Factories (London)

Workspace can be located above workshops with access from yard space



Frontage

Improved frontage by locating entrances on street and allowing building to form perimeter of site where possible.

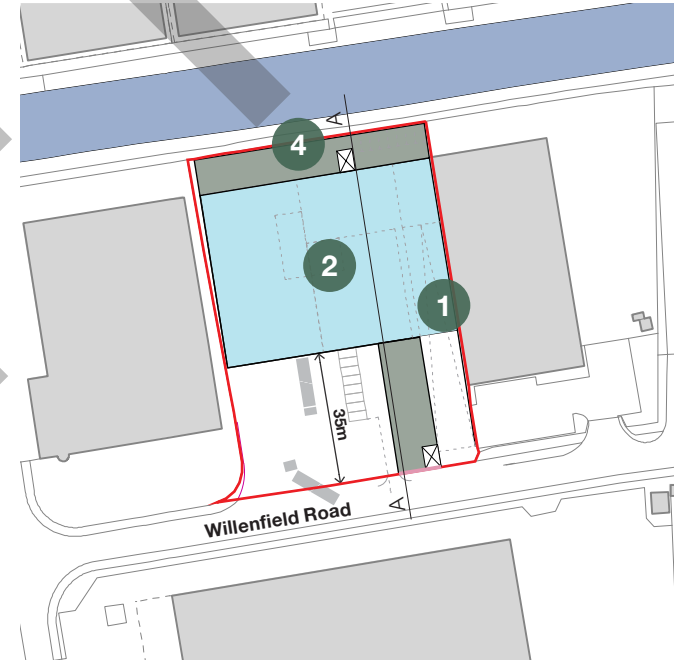
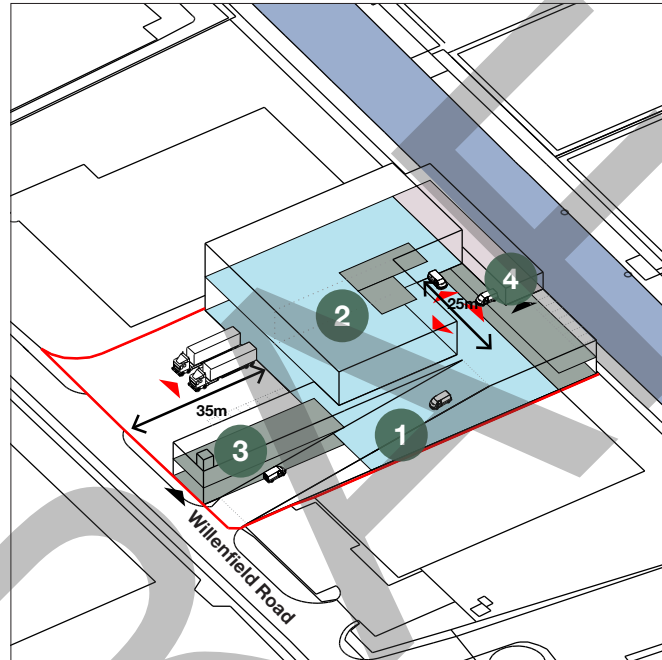
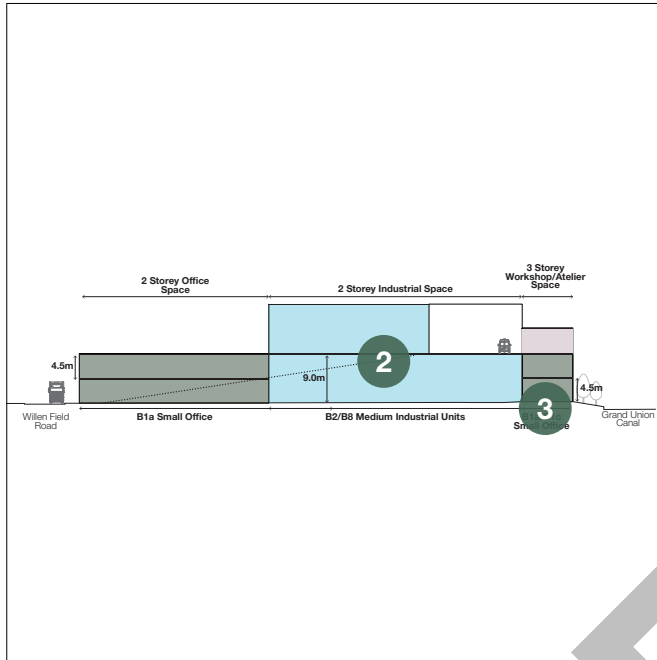
4 Typologies

4.2 Case Studies

4.2.1 Willen Field Road

4.2.1.5 Schematic Design

Summary
 The design delivers high density employment space alongside multi storey industrial spaces, better relationship with the canal and amenity for employees.



Approximate Existing Accommodation

Vacant site

Proposed Quantum of Development

B1a	963 m ²	10,365 ft ²
B1c	1,786 m ²	19,224 ft ²
B2/B8	703 m ²	7,567 ft ²

Overall Viability Position Viable

Surplus/Deficit

1 Ramp

Ramp along eastern edge of site allows service vehicles to access first floor, creating the opportunity for multi-storey industrial space and giving access to northern edge of site next the canal.

2 B2/B8 Medium Industrial Units

Industrial unit at ground floor with yard space accessed from Willen Field Road. Smaller industrial units with ancillary office space at first floor accessed via ramp, serviced by a yard suitable for smaller vans.

3 Frontage

Entrance and B1a space ancillary to industrial unit provides frontage onto Willen Field Road.

4 Workshop/Atelier

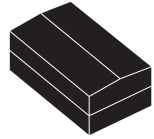
B1c/B1a building exploits views and access to the canal and footpath. B1c space has service access from yard accessed via ramp. Pedestrian access from Willen Field Road accommodated through office building at front of site.

4 Typologies

4.2 Case Studies

4.2.2 Gorst Road

4.2.2.1 Site Selection



Comprehensive Redevelopment

Address 37 Gorst Road
Postcode NW10 6LA
PTAL 4

Boundary Freehold
Business Renault Trucks
Site Type Standalone Warehouse
Building Type Large Industrial
Site Area 3,847 m²
Footprint 1,145 m²
EUV Cap

Site History

Existing yard area appears to be unused by current occupier. We understand the site was recently the subject of an enquiry by Segro to buy the land.

The site which comprises 9,712 sqft of warehouse space and 3,232 sqft of office space is currently available to let at £285,000.00 per annum.

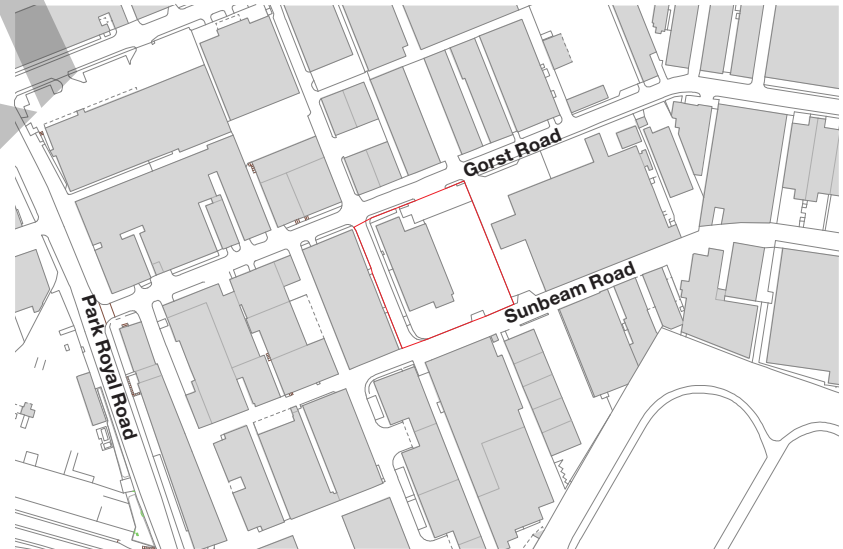
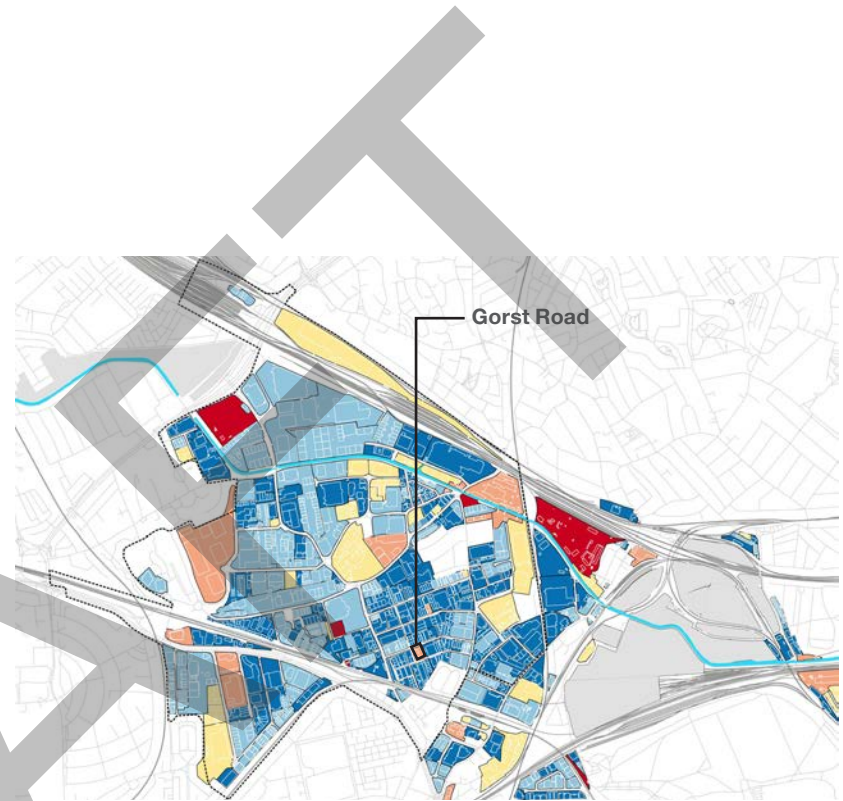
Site Selection

The site is identified as having a poor spatial efficiency. As such, the site is considered to have potential to deliver higher densities of employment on the site.

Development Objectives

The size and proportion of the site, with road access on two sides makes larger industrial spaces potentially very efficient. The separation of uses would increase their marketability

The sites location and PTAL also offers an opportunity to incorporate office uses.



4 Typologies

4.2 Case Studies

4.2.2 Gorst Road

4.2.2.2 Existing Site



View to south

The existing site looking south from Gorst Road



Sunbeam Road

Southern edge of site on Sunbeam Road

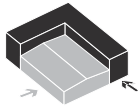
4 Typologies

4.2 Case Studies

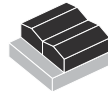
4.2.2 Gorst Road

4.2.2.3 Mix and Space Requirements

**Design Principle 1:
Separate Access**



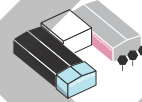
**Design Principle 2:
Stack Uses**



**Design Principle 4:
Exploit Accessibility**



**Design Principle 6:
Placemaking**



Use Class	Justification
B1a	PTAL and local amenity provide potential for attractive location for B1 uses ancillary to industrial uses on site.
B1c	Location and existing clusters of industries could be appropriate for flexible space for SMEs.
B2/B8	Good access from Gorst Road/Park Royal Road supports high quality industrial space.

Typology	Justification
Medium Warehouse	Access and size of site restricts larger industrial units, but size and proportions of plot can accommodate warehouses.
Studio/Workshop	Site access on three sides allows for servicing to smaller workspaces. Size could allow flexible units.
Small Office	Site access from three sites allows for dedicated access for offices, separate from industrial access.

Typology Requirements

For spatial/operational requirements for each typology, please refer to appendix B.

	Key Design Considerations
Place making	Focussing B1 uses on Sunbeam Road could, combined with similar initiatives along the road create a positive environment on the route to North Acton Station
Viability	Although the site has a reasonable PTAL rating, the viability and therefore delivery of new B1 office space remains very challenging in isolation in this location due to the industrial nature of the surround area, low level of amenities and lack of existing offer. Demand from businesses remains overwhelmingly for industrial space where there is demand is viable to deliver.
Employment Density	Introducing higher employment densities at ground floor through B1c and provision of B1a space can exploit the location at good PTAL to provide an uplift in densities.

4 Typologies

4.2 Case Studies

4.2.2 Gorst Road

4.2.2.4 Precedents



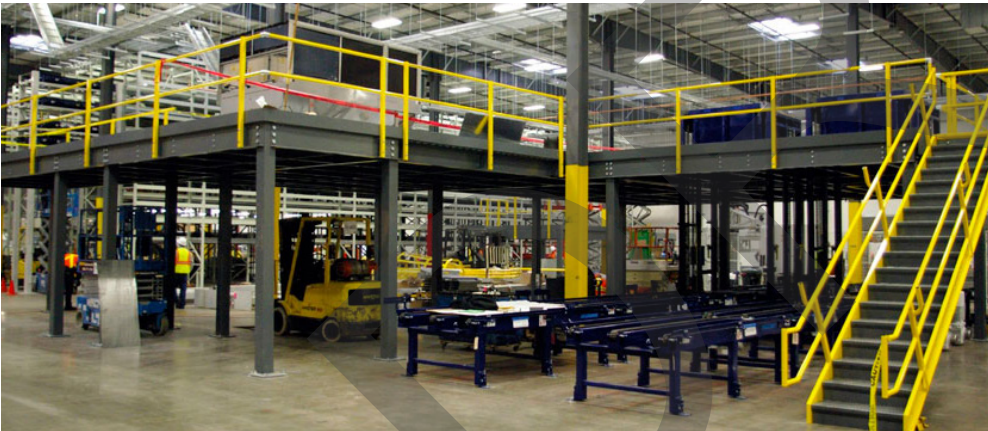
Workshop/Atelier (Spike Island, Bristol)

Consolidation of B1 uses on certain streets can create positive environments, improving the marketability of multilevel B1 space



Kaap Nord

Offices above workshops, with service access



Mezzanine

Mezzanine levels provide significant increase in warehouse spaces.

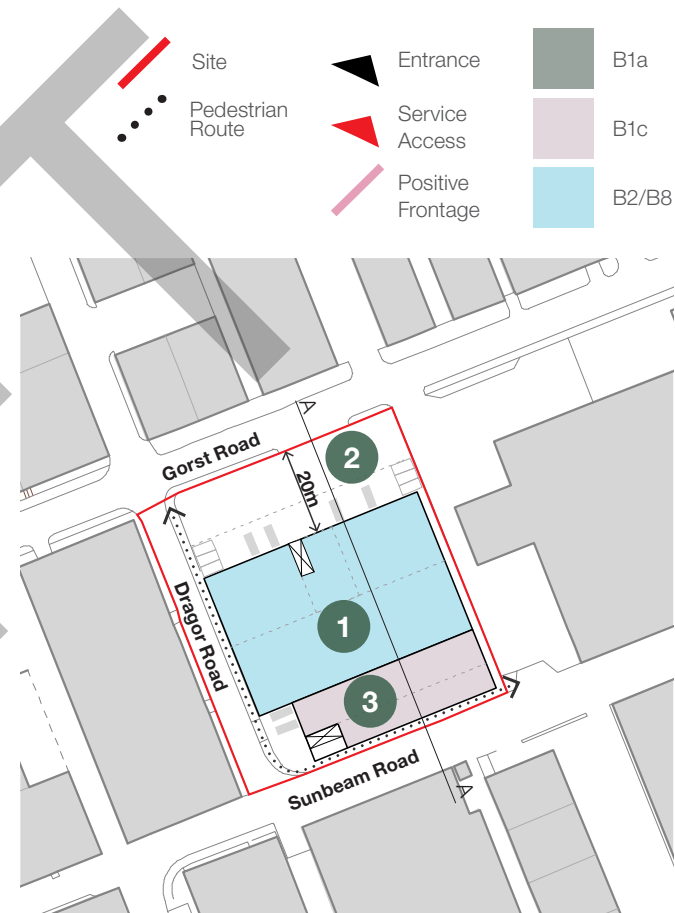
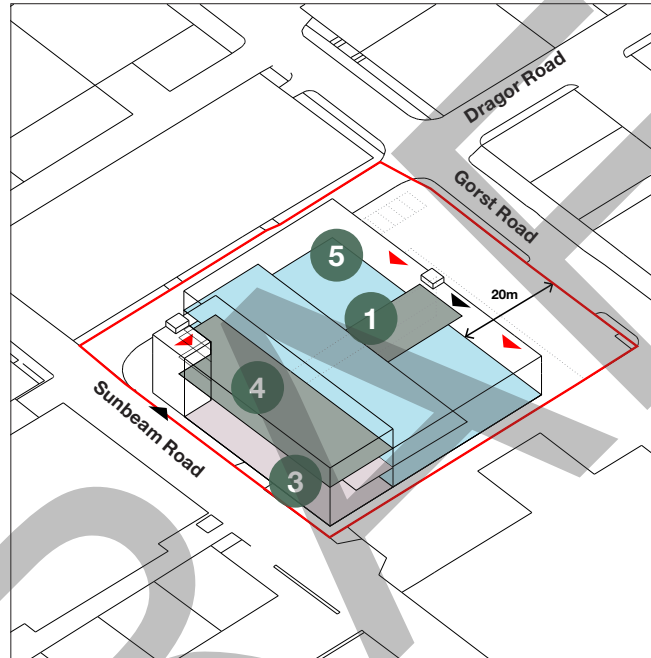
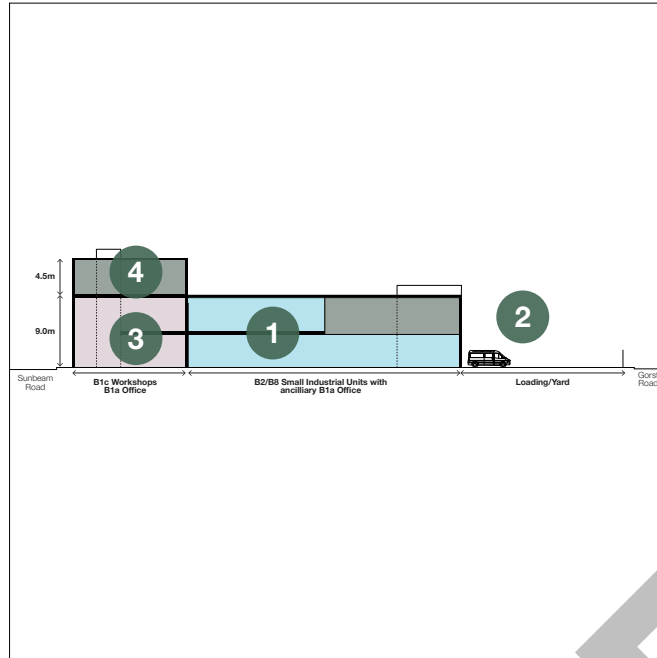
4 Typologies

4.2 Case Studies

4.2.2 Gorst Road

4.2.2.5 Schematic Design

Summary
 The design delivers 260% increase of overall floorspace, creating a positive frontage onto Sunbeam Road



Approximate Existing Accommodation

B1a	300 m ²	3,230 ft ²
B2/B8	900 m ²	9,700 ft ²

Proposed Quantum of Development

B1a	642 m ²	6,910 ft ²
B1c	642 m ²	6,910 ft ²
B2/B8	1,787 m ²	19,235 ft ²

Overall Viability Position Viable

Surplus/Deficit

1 B2/B8 Industrial units with mezzanine

Larger industrial uses located to north of site, where vehicular access from Park Royal Road is more direct. Small industrial units including mezzanine level, with consolidated office space.

2 Loading

20m deep service yard accessed via Gorst Road.

3 Workshops/Atelier

Ground floor B1c space with mezzanine level adding additional floor space but admitting light.

4 Office Space

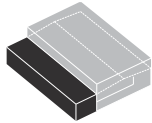
Upper storeys support B1 uses with dedicated access off Sunbeam Road. Location of B1 uses takes advantage of most direct route to North Acton station.

4 Typologies

4.2 Case Studies

4.2.3 Waxlow Road

4.2.3.1 Site Selection



Horizontal Extension

Address 13 Waxlow Road
Postcode NW10 7NU
PTAL 3

Boundary
Business Goldenstand Southern Ltd.
Site Type Standalone warehouse
Building Type Large industrial
Site Area 2937m²
Footprint
EUV Cap

Site History

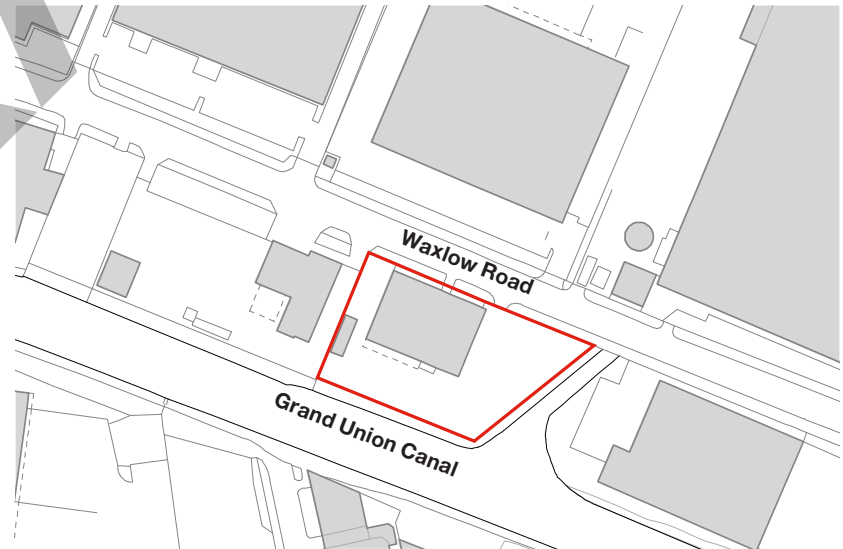
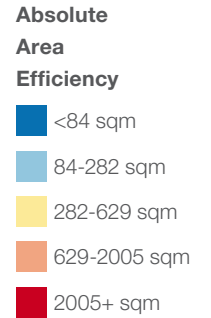
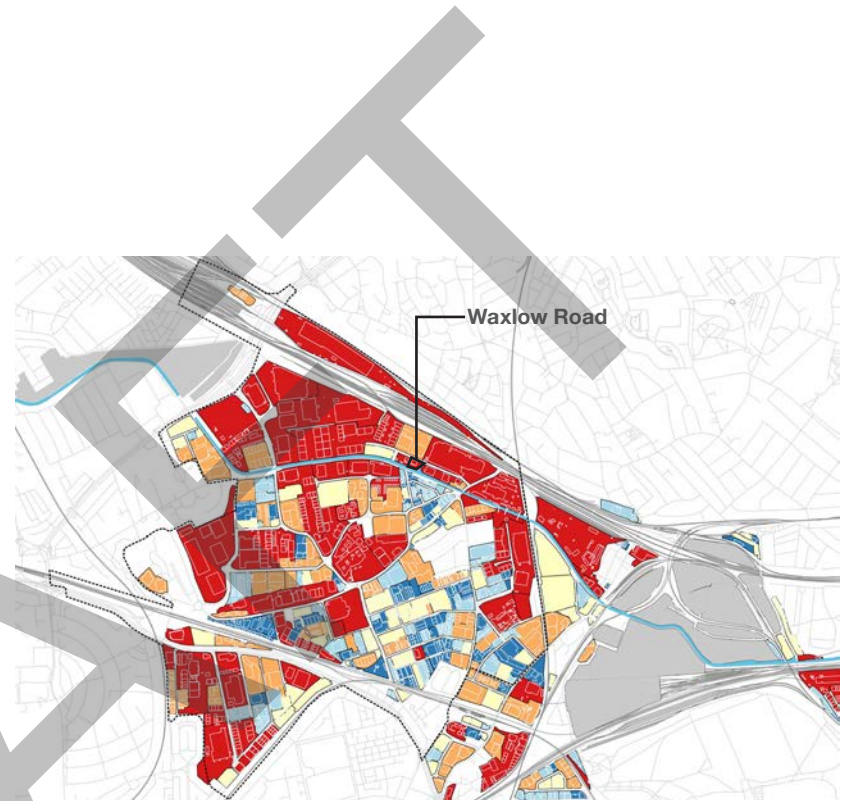
Planning permission has been granted (15/5358) for a change of use of the coach depot site, which is currently Sui Generis into a use within the use classes B1c (light industry), B2 (general industry) or B8 (storage and distribution).

Site Selection

The site has been selected due to its low area efficiency. It is a good example of an older warehouse and yard along the canal that could be used more efficiently. There are a number of sites along the canal with similar characteristics.

Development Objectives

The existing function of the building is industry and storage (B8/B2). There is also an opportunity to add additional B1c and B1a to the site taking advantage of the canalside amenity.



4 Typologies

4.2 Case Studies

4.2.3 Waxlow Road

4.2.3.2 Existing site



Waxlow Road and Canal

The site has the canal on two sides with the Grand Union on the south and a smaller inlet on the eastern boundary. Waxlow Road is located on the north side.



Waxlow Road looking west

The existing brick warehouse building with yard space in the foreground.

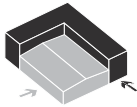
4 Typologies

4.2 Case Studies

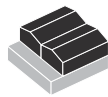
4.2.3 Waxlow Road

4.2.3.3 Mix and Space Requirements

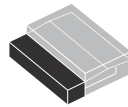
**Design Principle 1:
Separate Access**



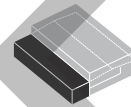
**Design Principle 2:
Stack Uses**



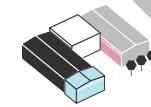
**Design Principle 3:
Shared Facilities**



**Design Principle 4:
Exploit Location**



**Design Principle 6:
Placemaking**



Use Class	Justification
B1a	PTAL and local amenity provide attractive location for B1 uses.
B1c	PTAL and separate access to Waxlow Road.
B2/B8	Continuation of existing site uses.

Typology	Justification
Small office	Separate entrance from Waxlow Road for pedestrians.
Studio/ workspace	With access to a dedicated loading area and yard space off Waxlow Road. Separate pedestrian entrance.
Small warehouse	Continuation of use of the existing building B2/B8.

Typology Requirements

For spatial/operational requirements for each typology, please refer to appendix B.

	Key Design Considerations
Place making	Street presence is improved with the addition of workspace and office on Waxlow Road. The design makes the most of the canal side location providing amenity along the canal edge.
Viability	Space with views over the canal (amenity space) and proximity to public transport (accessibility) means Waxlow Road is likely to prove attractive to B1a office occupiers, much more so than other case study sites. This is likely to result in better rental values and interest from investors, and overall the site being more viable to deliver office space, albeit with other value generating employment uses such as industrial
Employment Density	Multi-storey typologies offer the opportunity to create space for higher density use classes, whilst maintaining industrial space on the ground floor.

4 Typologies

4.2 Case Studies

4.2.3 Waxlow Road

4.2.3.4 Precedents



Regent's Canal, London

Office space fronting onto the canal.



Woolwich, London

Light industrial at ground level and offices/studios above.



Hackney Wick, London

Outdoor space making the most of the canal side amenity.

4 Typologies

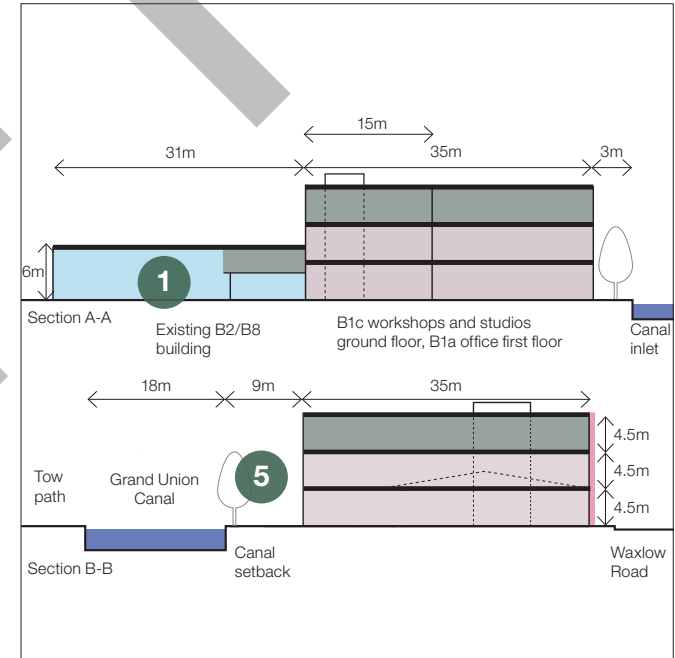
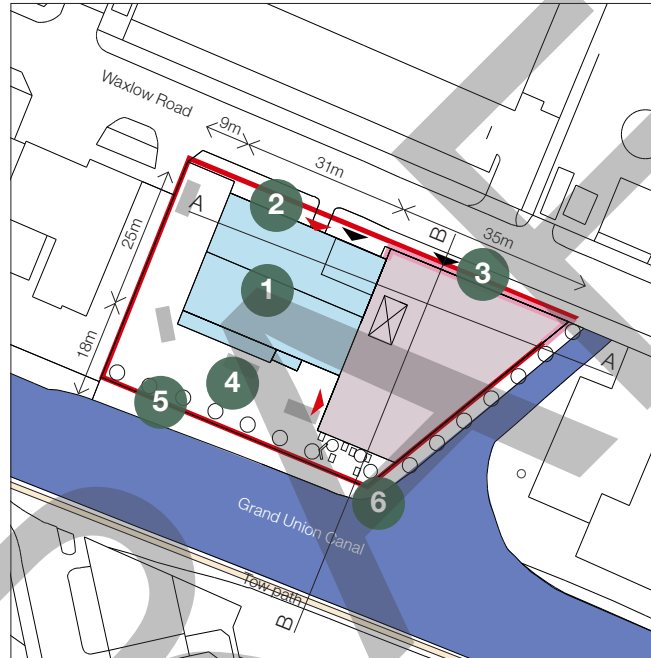
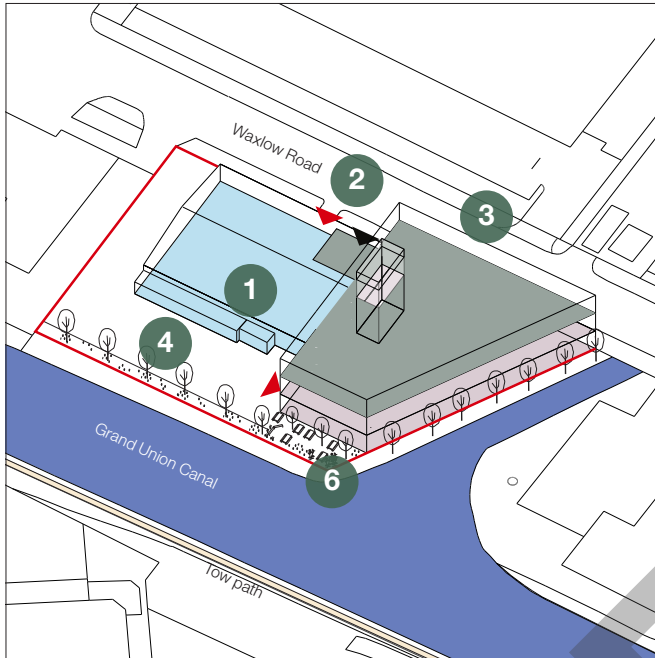
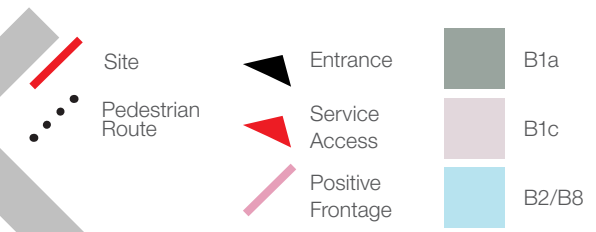
4.2 Case Studies

4.2.3 Waxlow Road

4.2.3.5 Schematic Design

Summary

The design delivers higher density with the addition of new B1c workspace and B1a office while retaining the existing B2/B8 storage. Making the most of the canal side location, the scheme maximises amenity.



Approximate Existing Accommodation

812 m² 8,740 ft²

Proposed Quantum of Development

B1a 963 m² 10,365 ft²

B1c 1,786 m² 19,224 ft²

B2/B8 703 m² 7,567 ft²

Overall Viability Position Viable

Surplus/Deficit

1. Existing brick building

The existing brick building is used for B2/B8 storage and is to be retained with the addition of an internal mezzanine for office uses (B1a).

2. Vehicle entry to existing building

Entry to the existing building will be maintained.

3. Separate entrance for pedestrians to new B1a space

Entry from Waxlow Road for pedestrians to reception area on ground floor. A lift connects the entrance foyer with the upper B1a storeys.

4. Yard space

Accessible from Waxlow Road with loading access for B1c.

5. Canal setback

All development has been setback from the canal to allow access.

5. Canal side outdoor area

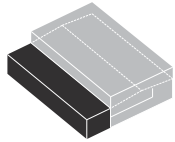
Amenity area next to the canal with seating and planting.

4 Typologies

4.2 Case Studies

4.2.4 Brooks Packaging

4.2.4.1 Site Selection



Horizontal Extension

Address 37-39 North Acton Road
Postcode NW10 6PF
PTAL 4

Boundary Freehold
Business Brooks Packaging Ltd
Site Type Industrial Estate
Building Type Large Industrial
Site Area 9497 m²
Footprint 5577 m²
EUV Cap

Site History

Currently occupied by owner occupier using the site for wholesale.

No relevant planning history.

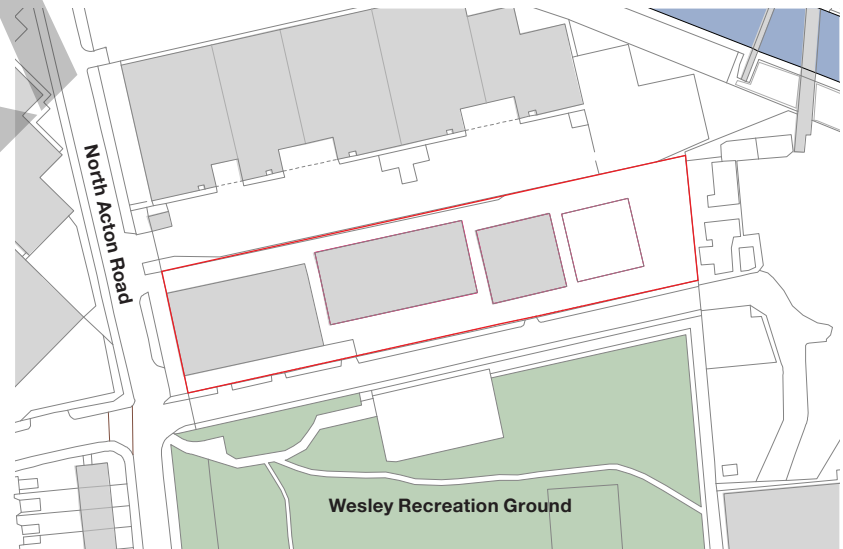
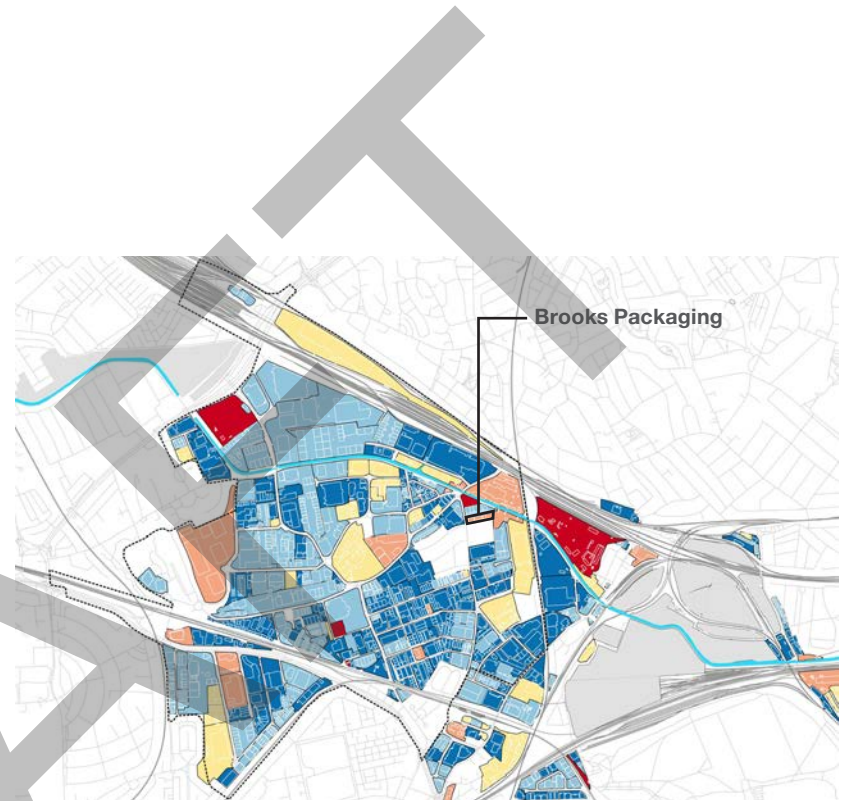
Site Selection

The site is identified as having a low area efficiency. The potential to intensify the site is further justified by its location and resultant PTAL which could support the addition of other uses.

Development Objectives

The sites location and proximity to Harlesden station and amenity space makes workspace on the site potentially desirable.

The existing building on North Acton Road has heritage quality and could therefore be attractive to come occupiers. Partial demolition and redevelopment could make the site coverage more efficient.



4 Typologies

4.2 Case Studies

4.2.4 Brooks Packaging

4.2.4.2 Existing Site



View to south
Existing warehouse on North Acton Road



Sunbeam Road
Access Road to south of site, along north edge of Wesley Recreation ground

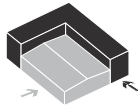
4 Typologies

4.2 Case Studies

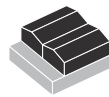
4.2.4 Brooks Packaging

4.2.4.3 Mix and Space Requirements

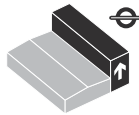
**Design Principle 1:
Separate Access**



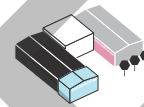
**Design Principle 2:
Stack Uses**



**Design Principle 4:
Exploit Accessibility**



**Design Principle 6:
Placemaking**



Use Class	Justification
B1a	PTAL and local open space amenity provide potential for attractive location for B1 uses.
B1c	Potential for additional workspace without loading/yard through horizontal extension or internal subdivision
B2/B8	Partial demolition would allow for provision of larger industrial units.

Typology	Justification
Small Warehouse	Access and size of site restricts larger industrial units, but size and proportions of plot can accommodate warehouses through partial demolition
Studio/ Workshop	Infill development could accommodate artisan manufacturing/ateliers.
Small Office	Infill development offers potential for entrances separate from industrial spaces

Typology Requirements

For spatial/operational requirements for each typology, please refer to Appendix B.

	Key Design Considerations
Place making	The existing assets of the existing warehouse on North Acton Lane and the Wesley Recreation ground should be exploited. A positive frontage should be created on the south and west boundaries of the site.
Viability	Values for B1a space in this location limit the extent of viable refurbishment to minor improvements and single storey horizontal extension. Key value drivers remains industrial as a good proportion of floor space.
Employment Density	Introducing higher employment densities at ground floor through B1c and provision of B1a space can exploit the location to provide an uplift in densities.

4 Typologies

4.2 Case Studies

4.2.4 Brooks Packaging

4.2.4.4 Precedents



Brooklyn Navy Yards, Brooklyn

Internal subdivision could incorporate higher grade industrial space in heritage building.



Hôtel Industriel, in Bois-de-Bay, Satigny

Small industrial units along with studio/workshop spaces.

4 Typologies

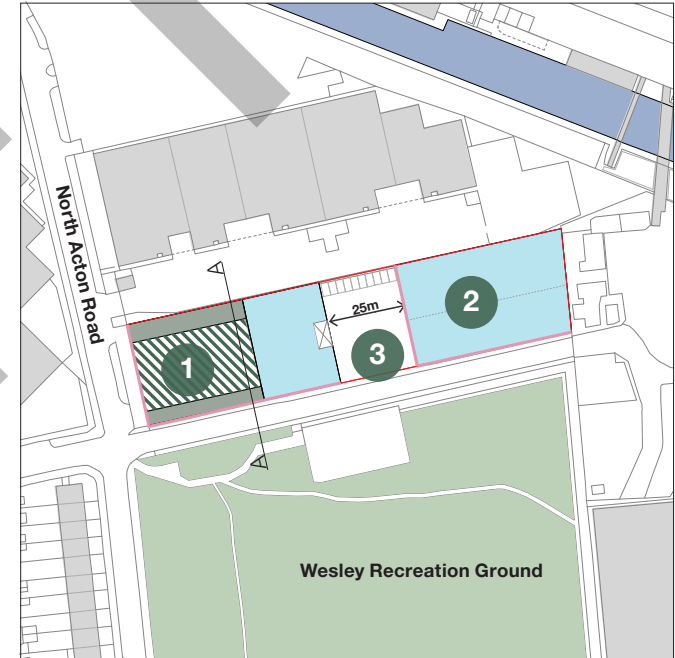
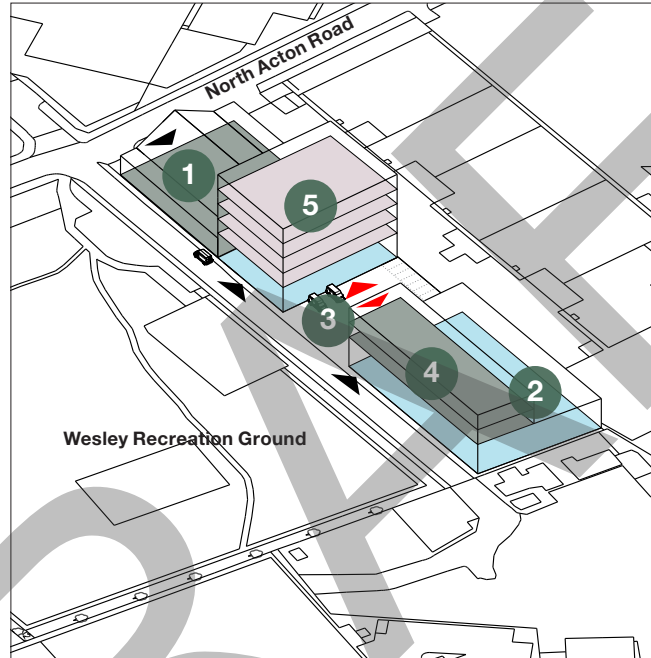
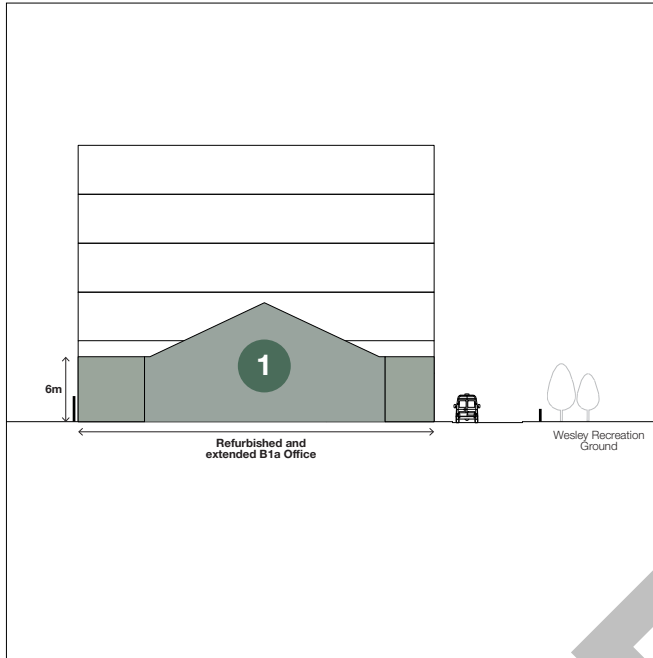
4.2 Case Studies

4.2.4 Brooks Packaging

4.2.4.5 Schematic Design

Summary

The design delivers 330% increase of overall floorspace, creating a positive frontage onto North Acton Road and Wesley Recreation Ground, maximising amenity for workers.



Approximate Existing Accommodation

2,004 m² 21,561 ft²

Proposed Quantum of Development

B1a 2,769 m² 29,805 ft²

B1c 3,292 m² 35,434 ft²

B2/B8 2,547 m² 27,415 ft²

Overall Viability Position Viable

Surplus/Deficit £ 1,930,000

1 Retain Warehouse Building

Existing warehouse building retained with single storey extension to the north and south. Building refurbished and use changed to B1a.

2 B2/B8 Medium Industrial Unit

Medium sized industrial warehouse serviced from shared yard.

3 Create Shared Yard

Yard space services new B1c and B2/B8 small industrial units. Yard dimensioned to accommodate transit vehicles.

4 Office Space

Ancillary office plus additional space exploits views over Wesley Recreation ground to the south.

5 Goods Lift

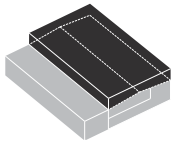
B1c space on upper storeys serviced via shared goods lift.

4 Typologies

4.2 Case Studies

4.2.5 Victoria Road

4.2.5.1 Site Selection



Vertical Extension/ Infill

Address 97 Victoria Road
Postcode NW10 6SX
PTAL 4

Boundary Freehold
Business Foxtons Ltd
Site Type Industrial Estate
Building Type Large Industrial
Site Area 3,719 m²
Footprint 2,401 m²
EUV Cap

Site History

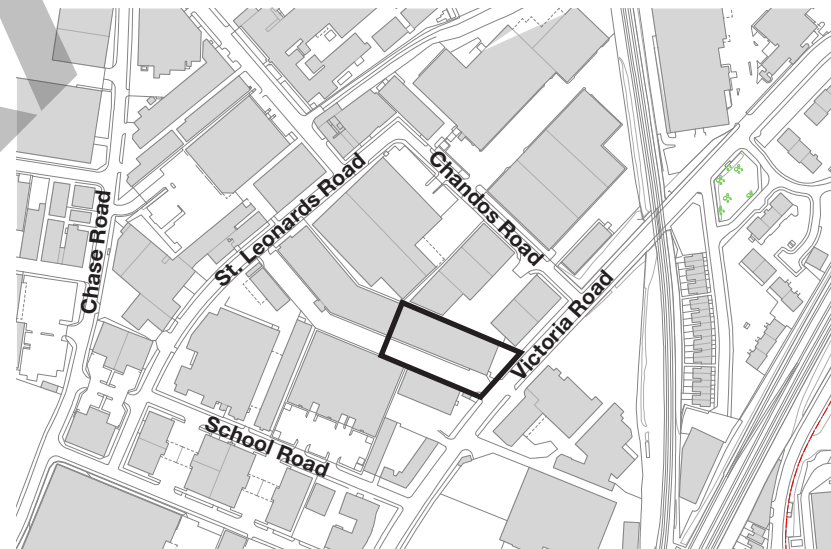
The existing site is owned by Kingston Estates. It is currently let to Foxtons estate agents on a recently renewed 15-year lease at £239,430 per annum. The owner has granted permission for the tenant to build a mezzanine floor (1,500sqft) and will make capital contribution to this refurbishment. The site currently has a building with 1,945m² GIA that is used for storage and distribution. The yard is used for vehicle storage. A planning application for the construction of an extension to the front/eastern elevation of the warehouse has been granted with conditions by LB Ealing. The extension would add an extra 218m² to the building.

Site Selection

The site has been selected due to its low FAR of 0.55. It has good accessibility with a PTAL of 4 and is five minutes walk from North Acton station. It has been identified as suitable for intensification through vertical extension and additional infill development. The site is an exemplar of a number of similar sites in the study area with warehouses and yards that are constrained and have limited access.

Development Objectives

A new building is proposed that contains space for the existing storage and industrial functions (B2/B8) and also adds new workspace (B1c) and office (B1a) functions. The B2/B8 will have 9m floor to ceiling height and level access to the yard and loading area. New workspace and studios (B1c) above the B2/B8 will have access to the yard via the goods lift. New office space will take advantage of the site's accessibility to public transport and improve the Victoria Road Street presence.



4 Typologies

4.2 Case Studies

4.2.5 Victoria Road

4.2.5.2 Existing site



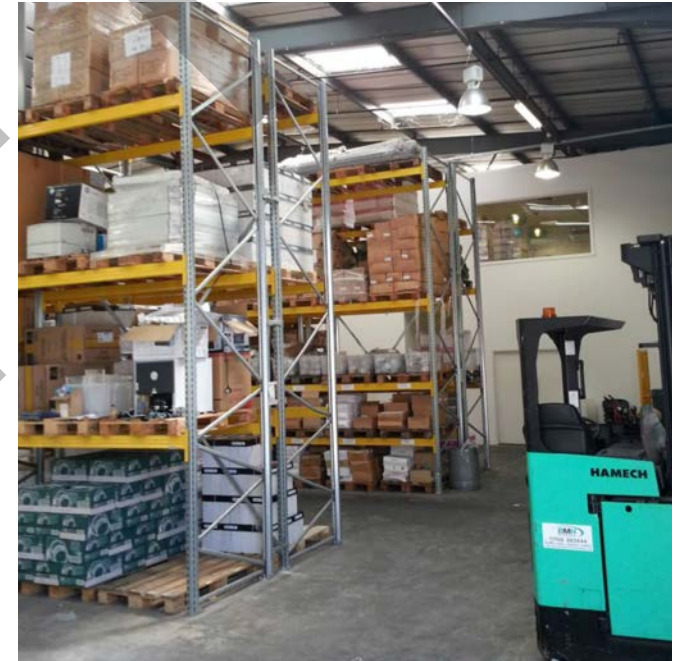
View from Victoria Road

The existing building used for storage with yard space in-front.



Yard space

View on site looking South towards Victoria Road of the existing yard used for parking.



Existing building

The existing warehouse space is used for storage.

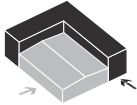
4 Typologies

4.2 Case Studies

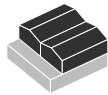
4.2.5 Victoria Road

4.2.5.3 Mix and Space Requirements

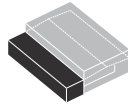
**Design Principle 1:
Separate Access**



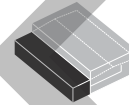
**Design Principle 2:
Stack Uses**



**Design Principle 3:
Shared Facilities**



**Design Principle 4:
Exploit Location**



Use Class	Justification
B1a	PTAL and local amenity provide potential for attractive location for B1 uses.
B1c	Location and existing clusters of industries could be appropriate for SMEs.
B2/8	Current use of site and possibility for small scale manufacturing.

Typology	Justification
Medium to large office	Site access offers potential for dedicated office entrance and address on Victoria Road.
Small Office	Workspace typologies not requiring loading bays suitable for accommodation on upper floors.
Warehouse/ Industrial space with loading access	Access from Victoria Road can be maintained as well as yard space for loading.

Typology Requirements

For spatial/operational requirements for each typology, please refer to appendix B.

	Key Design Considerations
Place making	The addition of new workspace and office functions as well as the improved street frontage.
Viability	Although still challenging to deliver new space viably, the site location of Victoria Road is likely to be prove more attractive to B1 office occupiers than some other study sites due to higher transport accessibility (close to North Acton station) and proximity to the future redevelopment of the Old Oak Common area. Separation of uses between frontage onto Victoria Road and rear of site should ensure space is more marketable.
Employment Density	Multi-storey office and light industrial space has potential to provide significant uplift in employment densities.

4 Typologies

4.2 Case Studies

4.2.5 Victoria Road

4.2.5.4 Precedents



Workspace and loading space, Amsterdam

A combination of workspace, offices and loading space in North Amsterdam.



Workspace, Munich

An example of multi-level workshops, this Gewerbehöfe is built by the city of Munich providing workshops for local industries and studio space.

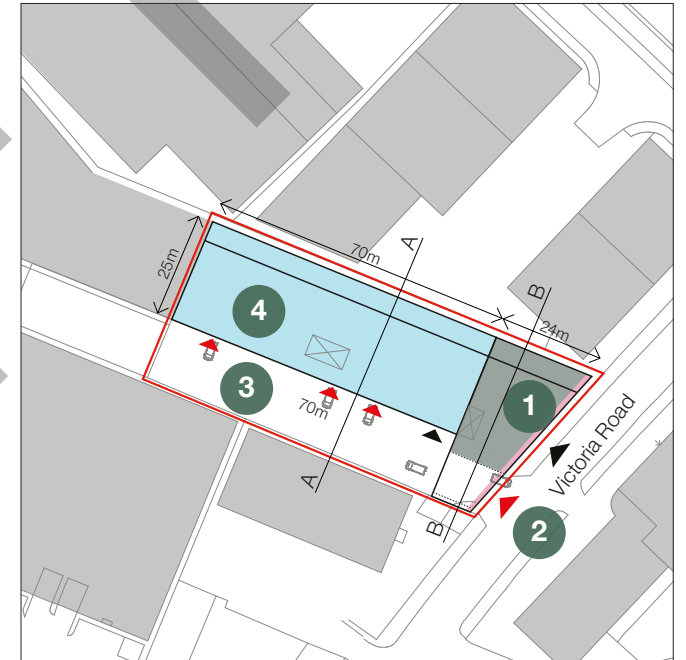
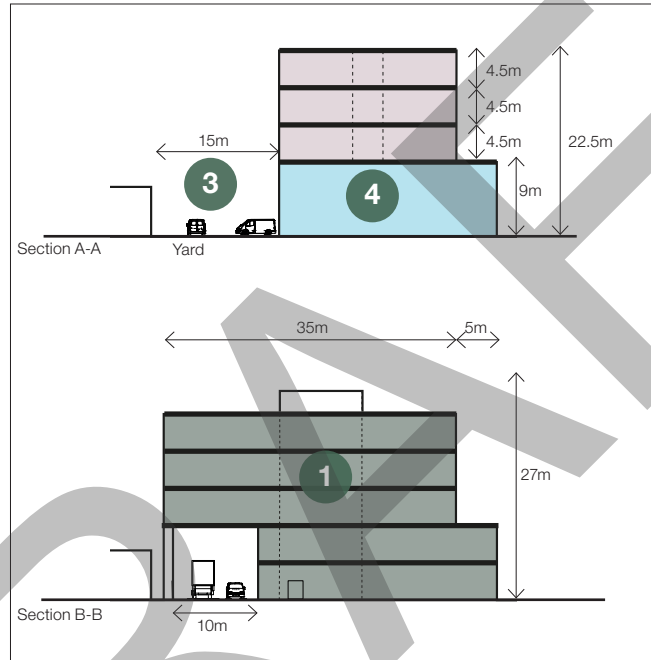
4 Typologies

4.2 Case Studies

4.2.5 Victoria Road

4.2.5.5 Schematic Design

Summary
 The design improves street presence, increases the overall development on site by 350%, retains the existing landuse (B2/B8) and adds the new functions of workspace, studios (B1c) and office (B1a)



Approximate Existing Accommodation

1,974 m² 21,248 ft²

Proposed Quantum of Development

B1a	2,771 m ²	29,827 ft ²
B1c	4,323 m ²	46,532 ft ²
B2/B8	1,750 m ²	18,837 ft ²

Overall Viability Position Viable

Surplus/Deficit

1. New office building

The new office building provides street presence, as well as a direct pedestrian entrance from Victoria Road.

2. Vehicle entrance

Vehicle access to the loading yard from Victoria Road is maintained.

3. Loading yard

The area for loading is maintained.

4. Building with B1c and B2/B8

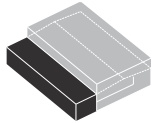
A new building with three upper floors of light industrial accessed by the goods lift and storage and industrial uses on the ground floor.

4 Typologies

4.2 Case Studies

4.2.6 Minerva Road

4.2.6.1 Site Selection



Phased Comprehensive Redevelopment

Address 32-36 & 38-42 Minerva Rd
Postcode NW10 6HJ
PTAL 3

Boundary Business Site Type SPC Automotive & ?
Dense industrial & vacant lot

Building Type Large industrial & yard
Site Area 7868m²
Footprint 2293m²
EUV Cap

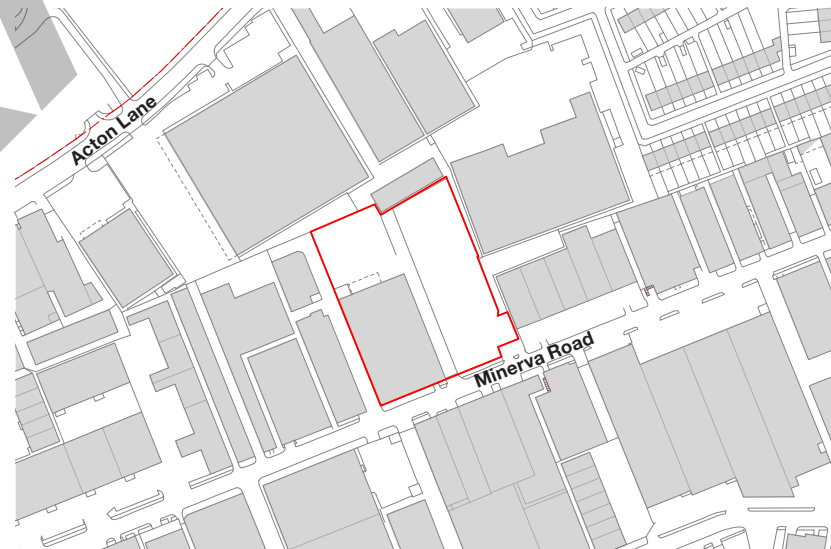
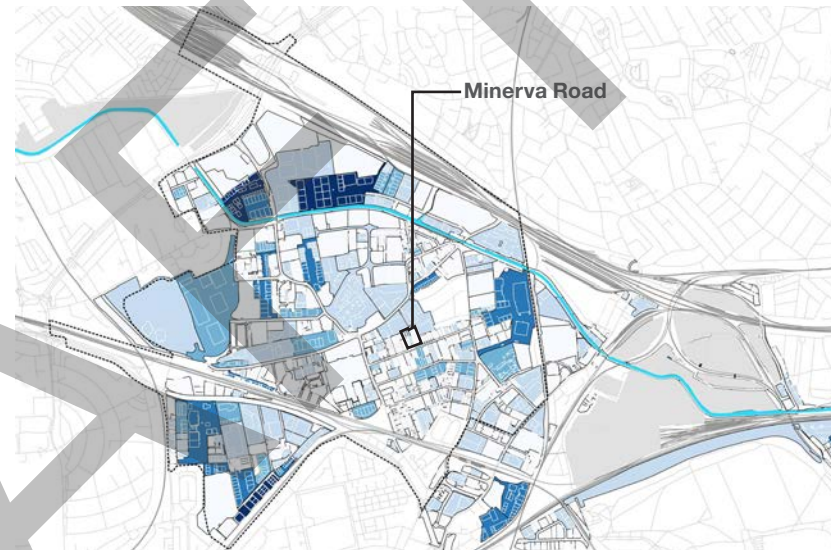
Site History

Site Selection

The site comprises of two consolidated pieces of land. These are 38-42 Minerva Road that contains a warehouse with yard space and 32-36 Minerva Road, a vacant lot used for storage. The site is a useful case study since its scale and size is representative of other dense industrial locations in Park Royal. There is an opportunity to develop with a phased approach as both sites have the same land owner. The first phase would be a new development on the vacant lot and the second a comprehensive redevelopment of the existing warehouse building.

Development Objectives

A phased comprehensive development is planned for the site. In phase one a new building would be constructed on the existing vacant lot adding additional B2/B8 as well as new office (B1a) along Minerva Road and flexible B1c workspace for SMEs. The existing warehouse would remain as B8/B2. In phase two the existing warehouse would be demolished and a second building constructed with a mix of B2/B8 on the ground floor and B2c workspace above. Both would have access to a shared yard space for loading. The frontage along Minerva Road would be enhanced with additional office space constructed.



4 Typologies

4.2 Case Studies

4.2.6 Minerva Road

4.2.6.2 Existing site



Existing warehouse

The existing warehouse frontage onto Minerva Road. Part of the warehouse is setback from the road and used for loading and parking.



View along Minerva Road

Minerva road with vacant site on the right and the existing warehouse in the background.

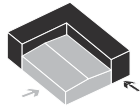
4 Typologies

4.2 Case Studies

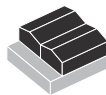
4.2.6 Minerva Road

4.2.6.3 Mix and Space Requirements

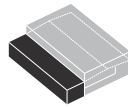
**Design Principle 1:
Separate Access**



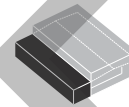
**Design Principle 2:
Stack Uses**



**Design Principle 3:
Shared Facilities**



**Design Principle 4:
Exploit Location**



Use Class	Justification
B1(a)	Relation to existing clusters and potential new SME's.
B1(c)	Existing clusters of industries could be appropriate for flexible space and SME's.
B2/B8	The site is now used for storage/distribution. Possibility for the addition of small scale manufacturing.

Typology	Justification
Medium to large office	Site access offers dedicated office entrance and address on Minerva Road.
Studio/workshop	New workspace that could be serviced by light vehicles as well as a loading yard.
Medium warehouse	Size of site and potential phasing of development. Access from Minerva Road, which is more suited to light and medium goods vehicles rather than HGVs.

Typology Requirements

For spatial/operational requirements for each typology, please refer to appendix B.

	Key Design Considerations
Place making	Improved street presence along Minerva Road with visible studio and flexible B1c space at street level as well as the introduction of additional B1(a) commercial space and an increase in B2/8.
Viability	Consolidating access for B1a office uses separately from industrial space and locating these directly fronting the street is likely to increase their appeal to occupiers. Limiting height to two storeys ensures a balance between sales area and construction costs.
Employment Density	Incorporating B1 uses with B2/B8 will provide space for higher density employment on the site.

4 Typologies

4.2 Case Studies

4.2.6 Minerva Road

4.2.6.4 Precedents



Shared yard, London

Industrial units with a shared yard and loading space



Street presence, Manchester

Workspace with strong positive street presence.



Ada Street Workshops, London

Multi level work spaces accommodating a range of work and studio functions in Hackney.

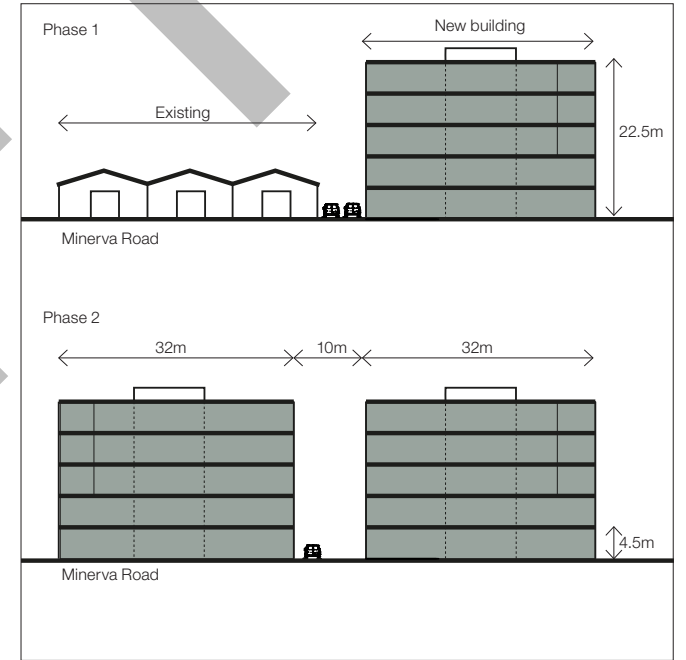
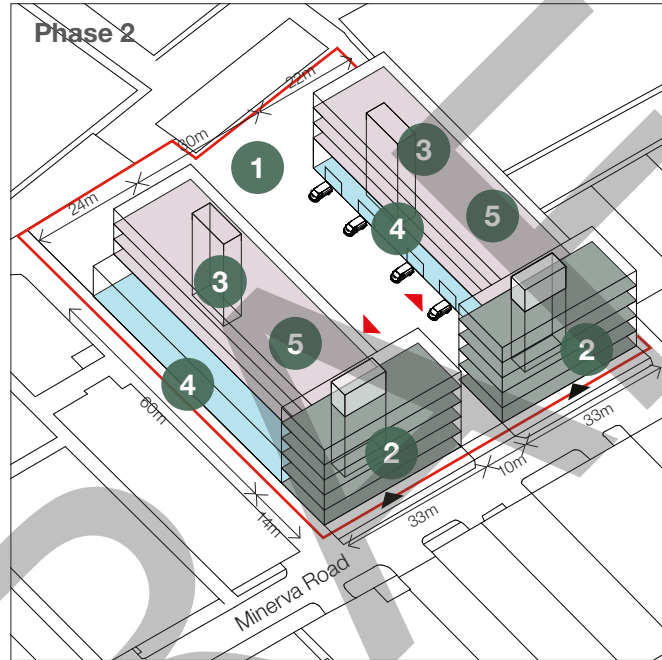
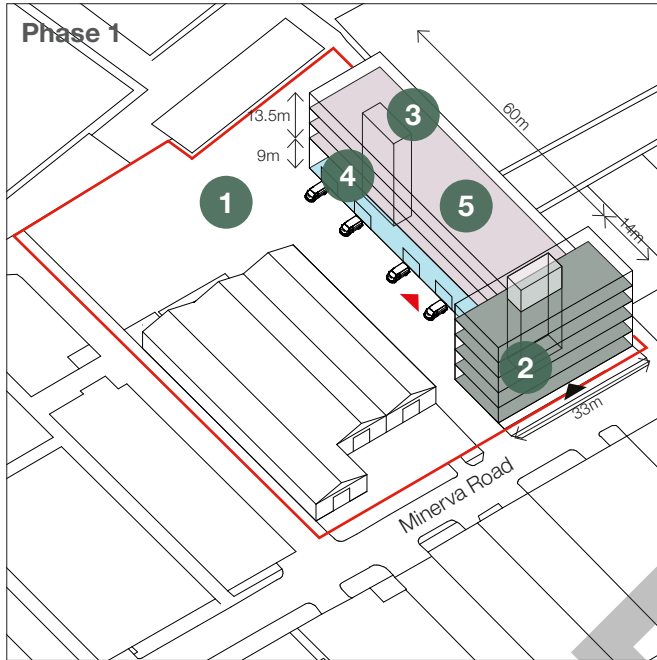
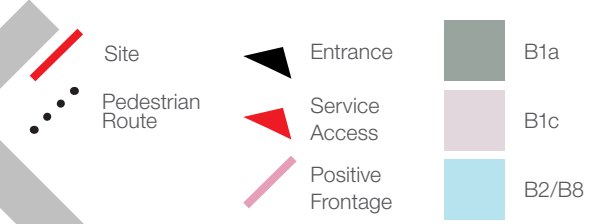
4 Typologies

4.2 Case Studies

4.2.6 Minerva Road

4.2.6.5 Schematic Design

Summary
 A phased development that provides a significant amount of new workspace and improves the street presence along Minerva Road.



Approximate Existing Accommodation		
B2/B8	1,960 m ²	21,097 ft ²
Proposed Quantum of Development		
B1a	4,570 m ²	49,191 ft ²
B1c	6,402 m ²	68,910 ft ²
B2/B8	2,749 m ²	29,590 ft ²

Overall Viability Position	Viabile
Surplus/Deficit	

- 1. Yard**
 Yard space is provided for B2/B8 and B1c uses with access from Minerva Road. Loading would be for light vehicles and is not intended for HGV's.
- 2. B1 entrances**
 The office buildings have their entrances on Minerva Road providing street presence.
- 3. Good lift**
 Goods lifts connect the B1c with the yards.

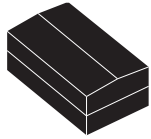
- 4. B8/B2**
 B2/B8 location on ground floor with direct access to yard/loading area and 9m clear height. A range of companies could be accommodated.
- 5. B1c**
 Would be able to accommodate a range of SME's with different sizes of space and access to the yard by goods lift.

4 Typologies

4.2 Case Studies

4.2.7 Bashley Road

4.2.7.1 Site Selection



New Build on vacant land

Address Travellers Road
Bashley Road, Volt Ave.

Postcode -
PTAL 1b

Boundary Site
Business -
Site Type Vacant land
Building Type -
Site Area 10,594 m²
Footprint 0 m²
EUV Cap

Site History

Owned by Inco Europe, the land is adjoining the Vale Acton - Precious Metal Refinery, one of the oldest businesses in the area with over 92 years on site. The site is surrounded by the Acton Refinery to the west, the Powergate Business Park and Volt Avenue to the north, the Ealing Travellers Site to the east and the Chandos Park Industrial Estate to the south.

No relevant planning history.

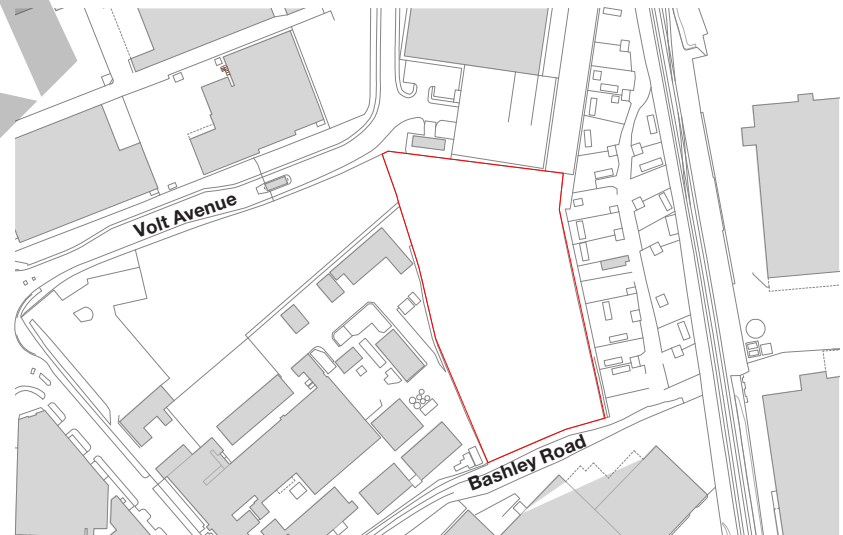
Site Selection

Given its current vacancy, the site is identified and highlighted by most indicators, as susceptible for intensification, as it shows a low FAR, low area or volume efficiencies. This condition makes it appropriate for new built intensive developments.

Development Objectives

Its current accessibility conditions makes the location suitable for medium sized warehouses.

Development of HS2 construction sites in Channel Gate as Industrial Innovation District and an improved accessibility could bring a demand for increased employment densities in the future.



4 Typologies

4.2 Case Studies

4.2.7 Bashley Road

4.2.7.2 Existing Site

1\ Adjacency to Acton Refinery

Site is compromised by the activities of the adjacent industrial buildings

2\ Entrance from Bashley Road

The only entrance to the site at the moment is from Bashley Road, through the Ealing Travellers Road. The entrance is narrow, shared with the travellers site and would condition the type of uses that could be accommodated on site.



3\ Entrance from Volt Avenue

Although the site could be accessed from Volt Avenue, this entrance is currently controlled by a checkpoint. A new entrance on this site would need to be agreed with adjacent landowners

4\ Access to West

Site to west is under same ownership, and a new route could be achieved through the existing car park.



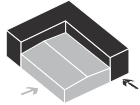
4 Typologies

4.2 Case Studies

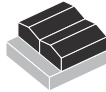
4.2.7 Bashley Road

4.2.7.3 Mix and Space Requirements

**Design Principle 1:
Separate Access**



**Design Principle 2:
Stack Uses**



Use Class	Justification
B1a	Provision of office space approximately 10% of built warehouse area
B2/B8	Location also suitable for small and medium scale manufacturing

Typology	Justification
Small Office	Provision within industrial units, serving the needs of on site businesses.
Small Industrial	High enough to allow internal subdivisions and mezzanines where applicable
Medium Industrial	Size and proportion of site could allocate medium sized warehouse units with enough yard space for medium sized transport vehicles.

Typology Requirements

For spatial/operational requirements for each typology, please refer to appendix B.

	Key Design Considerations
Place making	Site should respect the adjacency to traveller site to the east. Office uses should be positioned close to site access.
Viability	Due to its location B1a office uses will be challenging on this site beyond ancillary office space within industrial. Multi-level industrial typologies are feasible due to the good size of this site, but should keep HGV access to ground floor with access for light vehicles on upper floors to service 'last mile' operations.
Employment Density	As B1 uses are inappropriate in this location in large quantities, the approach should create an intense provision of industrial space, and hence multi-storey typologies should be considered to increase employment density.

4 Typologies

4.2 Case Studies

4.2.7 Bashley Road

4.2.7.4 Precedents



Stacked Industry (Theydon Road, Hackney)

Smaller industrial units are stacked above larger units through the provision of a ramp serving multiple units at first floor level.



Belartza, Donostia-San Sebastian

The stacking of smaller industrial types on upper floors enables a tighter site planning of ramps



Multi-storey warehousing (X2, Heathrow)

Vehicles access service yards on upper storeys via vehicle ramp

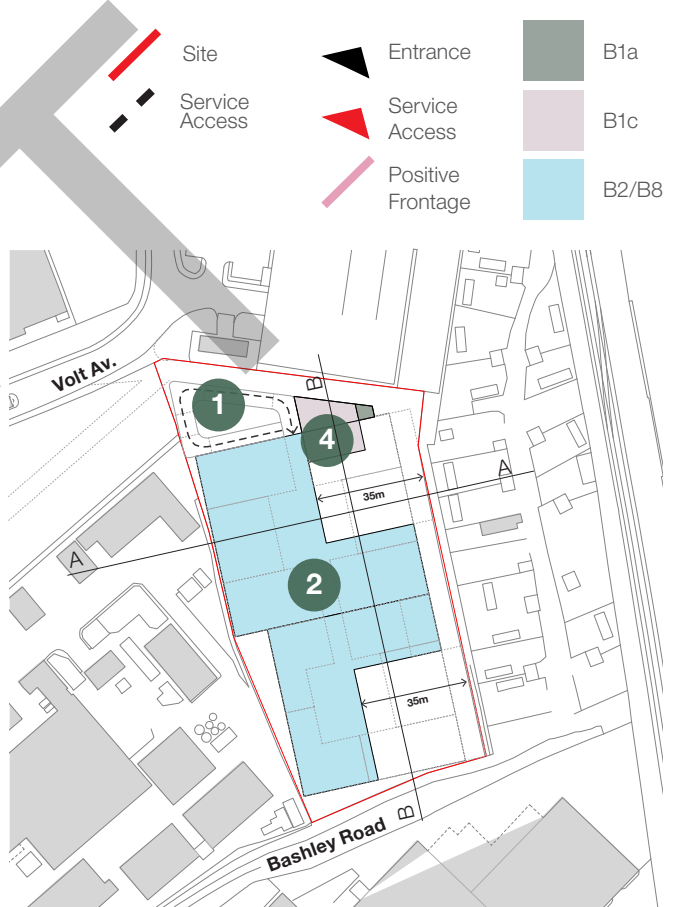
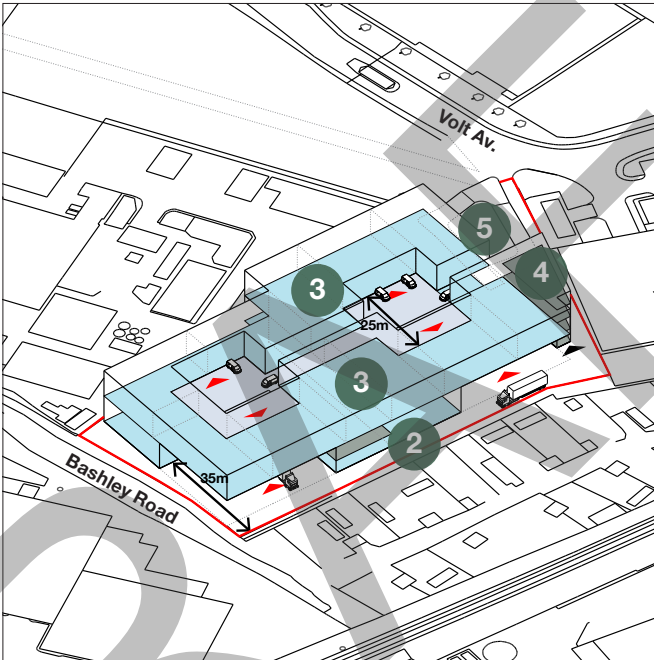
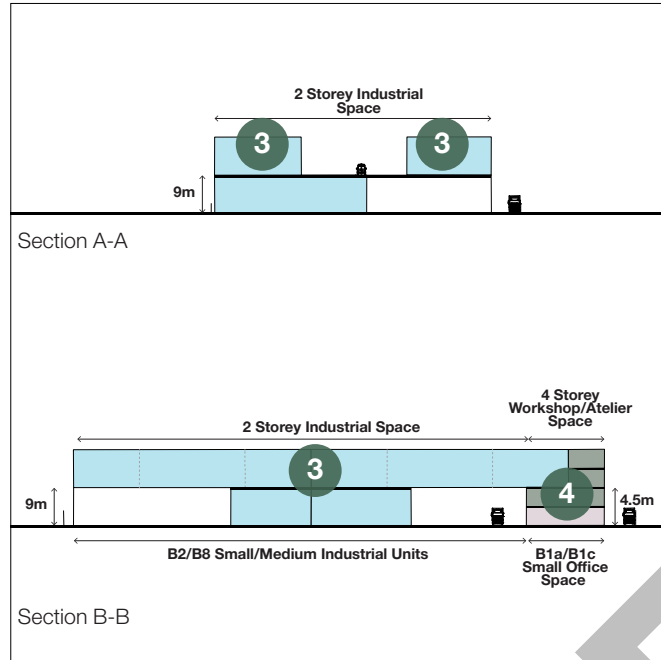
4 Typologies

4.2 Case Studies

4.2.7 Bashley Road

4.2.7.5 Schematic Design

Summary
 The design delivers a new mixture of large industrial and smaller industrial typologies through provision of a ramp for service vehicles.



Approximate Existing Accommodation

Vacant site

Proposed Quantum of Development

B1a	801 m ²	8,621 ft ²
B1c	363 m ²	3,907 ft ²
B2/B8	10,381 m ²	111,740 ft ²

Overall Viability Position Viable

Surplus/Deficit

1 Ramp

Ramp provides access to industrial units at first floor for 7.5 tonne vehicles

2 Medium Industrial Units

Industrial units with associated yardspace and ancillary office space.

3 Small Industrial Units

Small industrial units services from shared yards suitable for up to 7.5 tonne vehicles

4 Workshop/Atelier

Ground floor B1c Industrial space serviced from yard. Upper stories provide office space serving small industrial units.

5 Parking

Customer and employee car parking located beneath ramp to north of site, with direct access to office space.

4 Case Studies

4.3 Stakeholder Consultation Summary

4.3.1 Methodology

To gauge attitudes to the emerging design approaches, a range of key stakeholders attended a consultation session to offer comments.

Structure

The session was split into two sections, one introducing the approach taken to identifying case study sites and the broader intensification strategy, and a second section where comments on specific design approaches were encouraged.

The introductory section covered the following elements from the study:

- Purpose of the study
- Summary of market analysis
- Introducing intensification types
- Methodology for identifying sites
- Viability methodology
- Key viability findings
- Key opportunities and constraints

The second part of the consultation focussed on 4 case studies, covering the variety of approaches to intensification taken in the project. These covered:

- Willen Field Road
- Gorst Road
- Minerva Road
- Brookes Packaging

Discussion on the case studies was focussed around asking specific questions on each case study, covering demand, design and management:

- Would this type of accommodation meet the current needs of your business/you customers?
- How could these designs be improved?
- Some of these typologies could be configured as managed workspaces- divided into smaller units with some shared space. What approaches could there be to managing these spaces?

Attendees

Business Profiles

Attendees from business included people managing multiple properties, operators of individual companies, representatives and consultants:

- Architect
- Food and beverage business manufacturing consultancy
- Artist studio manager
- Business representative

Developer Profiles

Representatives from development attended from two key stakeholders in Park Royal from:

- Segro
- Dephna

Authority Profiles

Local Authorities with land that constitutes part of Park Royal were in attendance:

- Ealing council



4 Case Studies

4.3 Stakeholder Consultation Summary

4.3.2 Outcomes

DRAFT

4 Case Studies

4.4 Viability Methodology

Approach to Assessing Viability

The viability of each of the Park Royal proposals have been assessed through the following approach:

1. Identify future growth sectors for Park Royal – utilising findings from the draft Regeneris Future Growth Sectors Employment Study.
2. C&W identified the applicable development uses by planning use class – based on evidence from Future Growth Sectors Study. This informed the collation of the types of property market evidence needed.
3. Collation of property market evidence from primary market information sources – research and collate property market evidence from data bases such as CoStar as well as refined through discussions with C&W agents. Appropriate values and yields have been applied on a site by site basis and in accordance to use, then input into the model.
4. Establishing an Existing Use Value (EUV) benchmark against which viability results can be tested – the EUV of each development site has been estimated by calculating estimated floor areas and applying applicable rental values and capitalisation rates. The EUV forms the benchmark against which the residual

land value of each site’s development proposals are measured for viability.

5. Financial modelling to identify the residual land value (RLV) for each of the study development proposals - financial viability appraisals have been undertaken using development appraisal software to identify the RLV. Utilising an established set of development (including value and cost) assumptions and proposals for each site - expressed as uses, floor areas and any associated infrastructure.

The residual sum represents the value of the land under the scheme appraised (while making the assumptions outlined in this report). This sum therefore represents the amount a developer undertaking the proposed scheme could afford to pay for the site (including land assembly cost, relocation of existing occupiers, etc) at the outset of the development. For a scheme to be viable the RLV has to be greater than the benchmark EUV of the asset in order to provide a financial rationale as to why the sites should be subject to redevelopment.

Existing Use Values Overview
Overview

This section provides an overview of how the Existing Use Values (EUVs) have been established for each of the study sites. The EUVs are important in establishing a benchmark against which development appraisal results can be tested for viability. In this sense EUVs are known as the benchmark land value (BLV). All properties within the study area are commercial therefore require a rent a capitalisation approach to ascertain their AUV.

- Existing Use Values (EUV) – The Benchmark
- Existing use values have been calculated by:
- Collating comparable evidence of commercial rental values and yields by property quality (low, medium, high), type and size.
 - Confirming and adjusting commercial values with C&W agents.
 - Multiplying estimated existing floor areas by capital values utilising comparable evidence

Approach

1. Identify site area and existing building footprint areas for each site.
2. Calculate net lettable floor areas by adjusting footprint floor areas

for unlettable space. In this case we have adjusted footprint areas by 90% to produce the net lettable areas.

3. Identify rents and yields appropriate for each property based on:
 - a. Quality of the building: Low (tertiary) or Secondary (medium)
 - b. Size
 - c. Use
 - d. Developed or cleared
4. Rents and yields identified from comparable evidence are applied to the notional net lettable floor area for each site.
5. A per acre value is produce to enable comparison between relative values of each site on a like for like basis to identify an abnormal values.
6. Where sites are cleared a value is established on a per acre value basis utilising prevailing market rates.

4 Case Studies
4.4 Costs and Values Summary

C&W
Table of viability against each case study

C&W add summary of viability findings

Section C - Conclusions

DRAFT

5 Jobs

The employment uplift potential on the case study sites provides the basis to assess additional employment capacity across the study area.

5.1 Methodology for Additional Employment Capacity Calculation

5.2 Locations and Additional Employment Capacity

5 Jobs

5.1 Methodology for Additional Employment Capacity Calculation

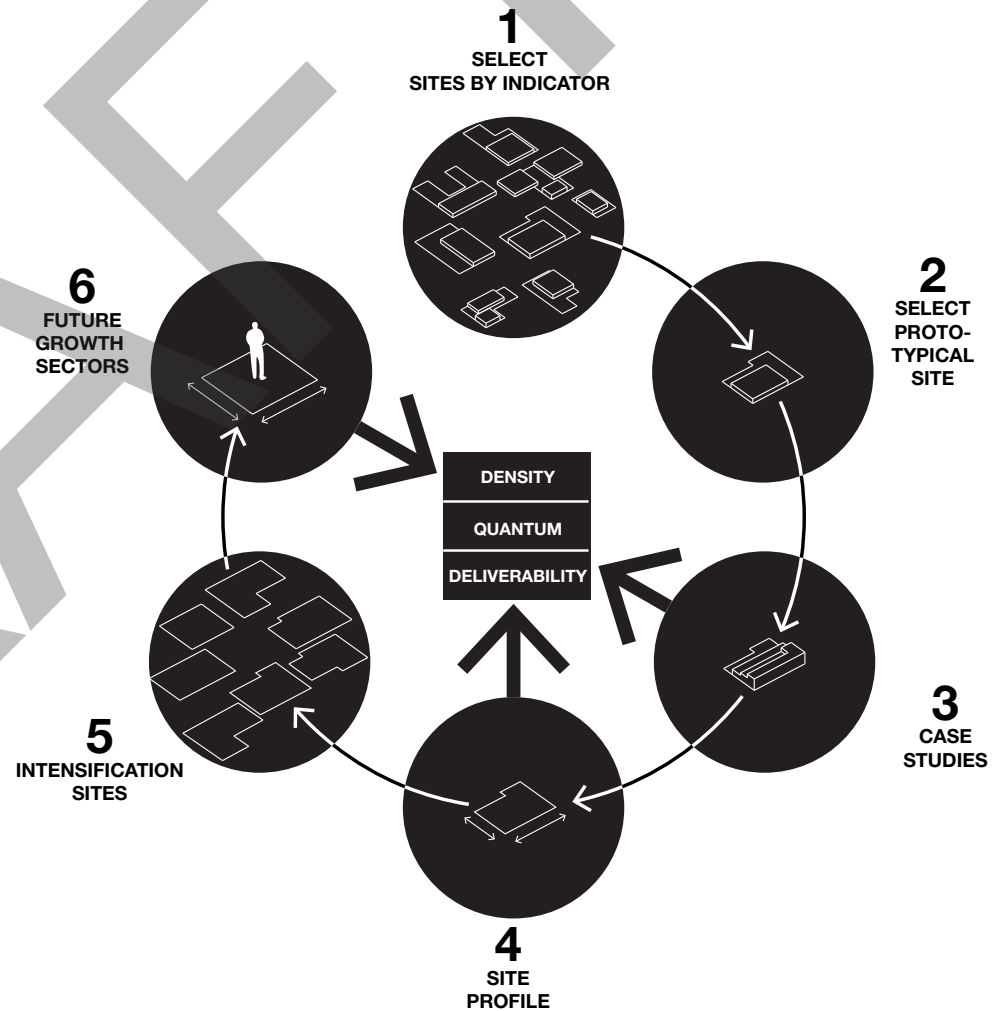
5.1.1 Workflow

In order to arrive at a robust figure for the additional employment capacity across the study area the following methodology establishes:

- the quantum of employment space potentially created through the intensification strategies
- The potential employment density of this new employment space
- The deliverability of achieving this quantum of space

The additional employment capacity is arrived at through the following steps:

1. Select sites suitable for intensification using indicators described in section 3.3.
2. From these sites, select prototypical sites that are most viable/deliverable
3. Through design testing of **case studies**, calculate quantum of space by use class possible on this site as a ratio of the site area.
4. Establish **site profile** based the site type, existing building type and condition, ownership (described on page 88).
5. Use this profile to locate **intensification sites** across the study area (described on page 89).
6. Potential employment densities on these sites will be assessed by use class, reflecting the likely occupiers based on the space requirements and geographical preferences set out in the Future Growth Sectors Study (describes on page 90).



5 Jobs

5.1 Methodology for Additional Employment Capacity Calculation

5.1.2 Intensification Sites

Site Profile

For each case study there are certain **spatial indicators** (type of site) and **incentives** (reasons to redevelop) that provide a site profile. These key characteristics determine:

- what type of design approach can be accommodated on a site
- whether they are likely to be redeveloped

Taking these characteristics and looking for sites that are similar therefore locates sites that could accommodate similar levels of intensification, and can be used to calculate a site wide figure for additional employment capacity.

Intensification sites identified using each case study site profile match **all** the spatial indicators of the case study site, therefore ensuring that the key elements of how the site is planned- access for goods, vehicles and people, separation of uses, appropriate yard dimensions etc. can be accommodates.

Intensification sites must match **one** of the incentives, providing a reason why landowner might develop in the near future, such as poor site coverage, many buildings within ownership etc.

Spatial Indicators

Site Area

Description

The area of the site determines the spatial typologies and mix of uses that can be accommodated. The area should allow adequate yard space, dedicated entrances to different uses and providing space of suitable proportions for market demand.

Site Proportion

Appropriate site proportions (calculated as how far the shape of the site deviates from a perfect square) ensures that the access and building typologies developed in the case studies are applicable to the intensification sites.

Average Building Height

Average height identifies buildings that have sufficient height to accommodate mezzanine floors and internal subdivision. It can also be used to locate buildings that are currently low and can accommodate additional storeys.

Building Footprint

Building footprint identifies buildings that have sufficient internal area to accommodate internal sub-division into smaller units.

Incentives

Area Efficiency

Area efficiency identifies sites that could accommodate significant increases in employment space, and therefore likely to be more attractive to redevelop.

Buildings per Freehold

Freeholds containing multiple buildings present an opportunity to decant existing businesses during phased redevelopment. This makes redevelopment more attractive to landowners, particularly owner-occupiers.

5 Jobs

5.1 Methodology for Additional Employment Capacity Calculation

5.1.2 Intensification Sites

Site Capacity

A low, conservative estimate for additional employment capacity reflects only the area generated by intensification sites located using case studies that are viable under current market conditions.

A higher, more ambitious additional employment capacity takes into account the intensification sites that would result from all feasible design approaches which could be viable in the future.

Sites used for low estimate (all viable)	Reference Case Study	Sites used for high estimate (max. capacity)	Reference Case Study
Willen Field Road	4.2.1	Willen Field Road	4.2.1
Gorst Road	4.2.2	Gorst Road	C.1
Waxlow Road	4.2.3	Waxlow Road	C.2
Brookes Packaging	4.2.4	Brookes Packaging	C.3
Victoria Road	4.2.5	Victoria Road	4.2.5
Minerva Road	4.2.6	Minerva Road	4.2.6
Bashley Road	4.2.7	Alpha Beta Centre	C.4
		Bashley Road	4.2.7
		Origin Business Park	C.5

5 Jobs

5.1 Methodology for Additional Employment Capacity Calculation

5.1.2 Employment Capacity Assessment

Methodology

The employment capacity assessment has been undertaken via a two-stage process:

1. Cross referencing the Park Royal intensification locations against the findings of the OPDC Future Growth Sectors Study, to identify the types of employment activities which might be expected to locate in different areas of Park Royal.
2. Applying standard government economic appraisal methodologies to assess the gross and additional employment which could be accommodated within the Park Royal via the delivery of the identified opportunities for intensification.

Employment Numbers

The employment numbers have been arrived at by the following steps:

1. Matching of uses and activities

As a first step, the OPDC Future Growth Sectors research has been used to provide an assessment of the types of sectors and activities likely to locate in different parts of Park Royal. This includes: the likely balance of activity between B2 and B8 uses across the area, and different types of spaces which might be accommodated within each of the broad use classes (eg. B1a –

professional service office space versus managed workspace; B2 – general manufacturing space versus maker space; B8- national, regional and final mile distribution activities).

2. Selection of appropriate employment densities

The 2015 HCA Employment Densities Guide provides a set of benchmark employment densities for different use classes and is the approved methodology for economic appraisal of this nature. The guidance has been used to select an appropriate employment density for each of the uses and activity identified in step 1.

3. Adjustment of floorspace figures

Where necessary, Gross Internal Area (GIA) floorspace figures have been adjusted to align with HCA employment density benchmarks. For B1a and B1c uses, GIA has been converted to Net Internal Area (NIA); for B8 uses, GIA has been converted to Gross External Area (GEA). No conversion is necessary for B2 space. In line with standard practice, conversion figures of 0.9 and 0.8 have been used to move from GEA to GIA, and GIA to NIA respectively.

4. Assessment of gross employment capacity

Building on the outcomes of steps 1 to 3, the gross employment capacity of the sites has been estimated by applying the allotted employment densities to the floorspace figures for each use class within the various intensification locations.

5. Assessment of additional employment capacity

Employment currently accommodated on the intensification sites has been assessed using the employment density by employment site as set out in the Industrial Land Review (2016). These estimates of current employment have then been subtracted from the estimates of intensified employment capacity, to arrive at the figure for additional employment capacity.

All figures are for full time equivalent (FTE) employment and are intended for indicative purposes only. The numbers provide an estimate of the theoretical employment capacity of the sites once intensified; they do not make any adjustments to take into account future occupancy / vacancy levels, the potential for displacement of jobs from elsewhere in the area, or the potential for natural growth / change which might occur anyway even in the absence of intensification (deadweight).

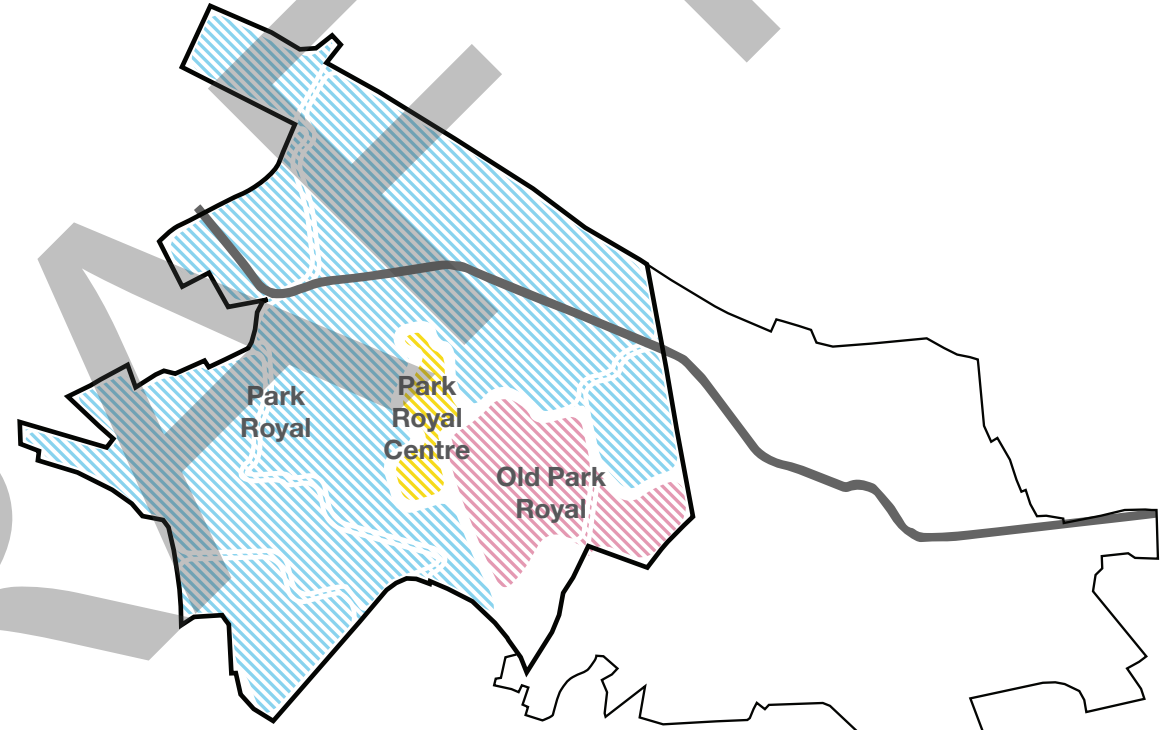
5 Jobs

5.2 Locations and Additional Employment Capacity

Additional Employment Capacity

The table below summarises the additional employment capacity of each place in Park Royal.

Place	Additional Employment Capacity Low Estimate	Additional Employment Capacity High Estimate
Park Royal	3,750 jobs	5,550 jobs
Park Royal Centre	0 jobs	0 jobs
Old Park Royal	1,350 jobs	2,350 jobs
Total	5,100 jobs	7,900 jobs



Places

Distinct places across Park Royal as defined within the OPDC area