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**Appendix 1**

Organisations Consulted



## **Organisations Consulted**

### **Property Market**

Quinton Scott	- John King and Mark Jones
CBRE	- Alastair Dawson
Coughlan Evans	- Richard Sayer

### **Economic/Business Organisations**

Merton Chamber of Commerce	- Diana Sterk
South London Business	- Peter Pledger
SOLOMAN	- Ian Andrews
Sustainable Merton	- Tom Walsh
London First	- No response

### **Other Organisations**

L B Merton Economic Development	- Nick Smart
South London Waste Partnership	- No Response
Merton Council Waste Officer	- Eben van der Westhuizen
Merton Council Waste Management	- Cormack Stokes
Local Education Authority	- Tom Proctor
Sutton/Merton PCT	- Andrew Grimes
Wimbledon College of Art	- George Blackstock, Dean
Low Carbon Economy	- Ross Mitchell

### **Developers/Landowners**

Chancery Gate	- Alastair King
Criterion Capital	- [No response]
Bizspace	- Trevor Farr



**Appendix 2**

Reference Documents





## Reference Documents

- 1 Employment Land Reviews: Guidance Note: ODPM (2004)
- 2 South East Plan Supplementary Guidance: Employment and Economic Land Assessments, South East Partnership Board, February 2010
- 3 Merton Employment Land Study, DTZ Piedad, 2005
- 4 Merton Economic Development Strategy, March 2010
- 5 Merton Local Economic Assessment, Regeneris, 2009
- 6 London Borough of Merton Unitary Development Plan (Adopted 2003)
- 7 The Adopted London Plan (2008) as consolidated with changes since 2004
- 8 Draft London Plan (2009)
- 9 London Industrial Land Release Benchmarks, Mayor of London, April 2007
- 10 London Office Policy Review, GLA, 2009
- 11 London Employment Time Series, Technical Report for GLA, March 2010
- 12 GLA Economics Working Paper 39: Borough Employment Projections to 2031, November 2009
- 13 Outer London Commission Interim Conclusions, 2009
- 14 Supplementary Survey of Scattered Sites, Merton Council, 2010
- 15 Merton Business Premises Study, WS Atkins, August 2009
- 16 Global Index of Regional Knowledge Economies: Benchmarking South East England. Final Report prepared for The South East England Development Agency (SEEDA), Robert Huggins Associates (November 2001)
- 17 Spatial Requirements of Key Sectors in the South East, Atkins for SEERA, 2004
- 18 Use of Business Space and Changing Working Practices in the South East: DTZ Piedad Consulting (May 2004).
- 19 The Impact of Off-shoring on the South East Economy: Experian for South East England Regional Assembly & the South East England Development Agency (November 2004)
- 20 Merton's Annual Monitoring Report, 2008/09: London Borough of Merton, 2009.
- 21 Commercial Floorspace Monitoring , 2009
- 22 Various Appeal decisions in London Borough of Merton.
- 23 Merton's Infrastructure Needs Assessment (2008).
- 24 Town Centre Study, Nathaniel Lichfield and Partners Ltd, 2005.
- 25 Town Centre Study Update, Nathaniel Lichfield and Partners Ltd, 2008.
- 26 Draft South London Waste Plan, 2009.
- 27 Office Market Report, King Sturge, 2010.
- 28 Industrial Market Report, King Sturge, 2010.
- 29 Draft Land Availability Study for South London Waste Plan, King Sturge, June 2010
- 30 London's Industrial Land Baseline, Report for LDA & GLA, June 2010
- 31 GLA Town Centre Health Checks (2009).



**Appendix 3**

Summary of Relevant Policy Aims



## **Summary of Economic Policy Aims**

This Appendix summarises key planning and economic policy aims relevant to the future economic strategy and employment land needs of the London Borough of Merton.

### **PPS4: Planning for Sustainable Economic Growth (December 2009)**

This guidance deals with retail development, town centre uses and economic development. In terms of economic development and employment land, its main messages are:

- an overarching objective of sustainable economic growth;
- as well as B Class uses, economic development now includes main town centre uses (e.g. leisure and retail uses) and public and community uses that generate jobs, create wealth or produce economic outputs;
- a generally more positive stance on economic development that secures economic benefits, weighing economic benefits against social and environmental costs and taking account of economic and physical regeneration of deprived areas, impact on local jobs, accessibility and effects on climate change;
- greater emphasis on a flexible approach to the supply and use of land;
- emphasis on the need for up to-date assessments of employment land needs and support for joint ELR and SHLAA studies;
- planning positively to support growth of clusters of knowledge based activities and emerging sectors;
- making the most efficient and effective use of land, prioritising previously developed land subject to factors as the locational requirements of businesses, site quality, access and proximity to markets and to the local workforce;
- considering how sites for different business types can be delivered and sites assembled including use of CPOs and other planning tools;
- an increased emphasis on economic development in rural areas but focused on existing settlements and local service centres, and supporting conversion and re-use of appropriately located and suitably constructed rural buildings.

### **The London Plan (Draft Replacement, October 2009)**

The London Plan aims to make London a more prosperous city with strong and diverse economic growth. Key aims for the provision of office space are set out in Policy 4.2, which seeks to:

- support the management and mixed use development and redevelopment of office provision to improve London's competitiveness and to address the wider objectives of the Plan, including enhancing its varied attractions for businesses of different types and sizes;
- consolidate and extend the strengths of the diverse office markets elsewhere in the capital by promoting their competitive advantages, focusing new development on viable locations with good public transport, enhancing the business environment including through mixed use redevelopment, and supporting managed conversion of surplus capacity to more viable, complementary uses;
- There is also an aspiration to provide a variety of types, sizes and costs of office premises to meet the needs of all sectors, including small and medium sized enterprises; and,
- With regard to Outer London there is a desire to manage long term, structural change in its office market, focusing on phased consolidation in strategically specified locations such as Croydon and Stratford, but also in other town centre based office quarters.

With regard to industrial premises key aims are:

- to ensure a sufficient stock of land and premises to meet the future needs of different types of industrial and related uses in different parts of London, including for good quality and affordable space;
- to plan, monitor and manage release of surplus industrial land where this is compatible with future needs, so that it can contribute to strategic and local planning objectives, especially those to provide more housing, and, in appropriate locations, to provide social infrastructure and to contribute to town centre renewal; and,
- Providing land for waste management, transport facilities (including inter-modal freight interchanges), logistics and wholesale at strategic and local levels.

### **SPG on Industrial Capacity (2008)**

The Supplementary Planning Guidance (SPG) provides guidance to:

- ensure an adequate stock of industrial capacity to meet the future needs and functional requirements of different types of industrial and related uses in different parts of London; and,
- plan, monitor and manage the release of surplus industrial land so that it can better contribute to strategic and local planning objectives, especially those to provide more housing (including affordable housing) and in appropriate locations provide social infrastructure and contribute to town centre renewal.

The South-West London Sub-region is expected to see a reduction of 166 ha of industrial land over the period 2006-26. Although these figures are not given at a Borough levels, a loss in proportion to its share of total industrial land would indicate that Merton has the potential to lose approximately 36 ha of land.

However, Merton is classified as a restricted transfer Borough meaning that it should adopt a more restrictive approach to the transfer of industrial sites to other uses. This does not preclude the possibility of smaller scale release where boroughs have made adequate provision of industrial land in their LDFs in particular for waste management uses. The estimated land-take of waste management in this area is expected to be 7 ha between 2006 and 2021.

### **London Economic Development Strategy (2010)**

The vision of this Strategy is that London should excel among global cities, expanding opportunities for all its people and enterprises, achieving the highest environmental standards and quality of life, and leading the world in its approach to tackling the urban challenges of the 21st century, particularly that of climate change. The strategy expects business services to be the main future driver of employment growth, although hotels & restaurants, personal, recreational and other services are also expected to contribute. In contrast, manufacturing is expected to continue to decline.

Actions which have impacts upon employment land include:

- directing growth into the places that have the greatest need of and potential for development, especially the Opportunity Areas;
- directing investment into existing major employment areas including the Central Activity Zone (CAZ), town centres and the Strategic Outer London Development Centres.

### **London Office Policy Review (2009)**

This GLA document contains a broad review of office demand and supply across London. With regard to outer London office centres it notes that the relocation of companies from Central London has decreased over the years, and many companies that were located in Central London have relocated staff further afield, to the regions and abroad. Thus many Outer London centres are now more heavily reliant on offices that serve local demand, including local government and other public sector administration. One of the key concerns here is the role of “marginal” office centres: those which lack critical mass, and which tend to benefit (if at all) in very “hot” markets, but which lose favour when demand is “thinner”. Very few locations commanded rental values that rendered development viable even at the peak of the cycle when investment yields were lower and rental growth was anticipated.

The LOPR states that no more than a handful of Outer London Centres stand any realistic chance of attracting demand from Central London, from Outer Metropolitan Area, from beyond the UK or from central government. As a result, it recommends that a realistic view is taken of these centres and that many are recognised as having no significant part to play in the London office market, other than providing for local needs.

With specific regard to Merton, the study notes that the Borough continues to be dominated by Wimbledon, a thriving business centre around a major railway station. Wimbledon is seen as a successful and prosperous area and easily outscores all other centres in the borough. The study recommends that Wimbledon clearly has a potential role in terms of polycentricity and could continue to grow as an office centre. However, it also notes that Mitcham and Morden have virtually no office market and Raynes Park remains a marginal office location. Importantly, Croydon is recognised as one of only four office 'development centres' in Outer London, the other three being Brent Cross/Cricklewood, Stratford and West London.

### **London Borough of Merton Unitary Development Plan (2003)**

The primary aims of the UDP are to achieve a "broadly based and prosperous urban and rural economy which provides employment and services for the District, and which contributes to the national economy".

The saved employment section of the UDP aims to retain existing employment land and floorspace whilst encouraging the redevelopment of vacant and underused land and floorspace for B-class uses.

Policy E3 outlines the uses that will be permitted on designated industrial sites. These are limited to:

- general industrial uses (class B2);
- uses for storage or distribution (class B8);
- uses involving research and development of products or processes or any industrial process, provided such uses do not impede effective operation of neighbouring businesses; and,
- expansion of established office use, where the impact on neighbouring firms can be mitigated through conditions.

Policy E6 only allows the loss of employment land outside of the designated industrial areas if:

- the land is in a predominantly residential area and the development proposed will provide a local community or cultural facility; or,
- if the land is in a predominantly residential area, residential use will be permitted provided that the size, configuration, access arrangements or other characteristics of the site make it unsuitable and financially unviable for any employment or community use as confirmed by full and proper marketing of the site for 5 years for employment or community purposes.



The policy also notes that compensatory measures comprising employment benefits locally may be sought for the loss of employment land through S106 agreements.

Policy E7 encourages businesses which can occupy light industrial, studio laboratory and small office premises to locate on the smaller scattered employment sites outside the designated industrial areas. Outside the designated industrial areas planning permission will not be granted for general industrial and storage and distribution developments, and outside the designated town centres and Colliers Wood town centre planning permission will not be granted for larger office developments.

Policy E12 encourages the development of starter premises and serviced work space for new and very small businesses which require small units of industrial, light industrial and studio floorspace.

### **Merton Draft Core Strategy (2009)**

Policy 16 of this draft document covers economic development and employment space. It seeks to ensure there is an adequate supply of viable and appropriate sites and premises for employment use in locations which minimise the need to travel by private car while meeting the needs of business by:

- Consolidating retail, office and leisure development that generate a large number of trips towards the major centres (Wimbledon) and district centres (Mitcham; Morden, Colliers Wood);
- Permitting some new commercial floorspace and protecting the viability and vitality of Merton's major centre (Wimbledon), district centres (Mitcham, Morden Colliers Wood (subject to its designation post 2011)) and local centres;
- Protecting and managing the designated Strategic Industrial Locations;
- Maintaining and improving the Locally Significant Industrial Locations so that they contribute towards business, industrial, storage and distribution functions; and,
- Creating new employment by protecting and improving scattered employment sites for small and growing businesses or community uses.

### **Merton Economic Development Strategy (2010)**

The Economic Strategy sets out the Borough's priorities for future economic development. Key aspects of the strategy with importance for employment land include:

- To build on Merton's strengths in location, attractiveness, brand value and expertise to promote its economy;
- To promote economic resilience in Merton through a diverse local economic base which does not rely too heavily on any one sector for its continued success; and,

- To ensure that activity is delivered in a way that supports other values and objectives, notably addressing deprivation in the east of the Borough and protecting built heritage and the environment.

Merton's strategy for the facilitation of sector growth is to intervene where specific sector strengths are identified and, where possible, to support clustering at key economic nodes in the borough. In addition, the strategy seeks to support specific 'opportunity' sectors which have the potential to deliver a significant economic benefit to the borough in the long term. Importantly, this strategy also seeks to support those sectors which are already significant employers of local people, supporting their diversification and (where relevant) future growth.

Priority Growth and Opportunity Sectors which have the potential to deliver growth and change perceptions within the borough include:

- Creative Industries: Artistic and Literary Interpretation; Software Design; Printing and Publishing;
- Green Industries: Environmental Technologies; Environmental Services;
- Business and Professional Services: Software; Consultancy and Database services; Management Consultancy; Financial Intermediation; Legal and Accounting; Advertising; and,
- The manufacturing and construction sectors are identified as declining but are important components of Merton's economy.

In terms of the locations for growth, these are based around three main areas:

- Greater Wimbledon: Merton's key economic driver. A major new economic area encompassing five key economic nodes. A hub for creative industries and significant destination in South West London. Ongoing growth in professional and business services accompanied by an enhanced retail and cultural offer;
- Mitcham and East Morden: A local service hub for Merton creating employment and enterprise. Increasing aspirations accompanied by support for ongoing employment and innovation in Construction and Manufacturing sectors; and,
- Morden: A high quality residential location, with good retail and local services as well as an emerging location for professional services. A centre for future growth in green industries.

## **Merton Local Economic Assessment (2009)**

This document provides an assessment of Merton's economy and its key sectors. It notes that the greatest growth in Merton's business base in recent years have been in the Construction and Public Administration sectors. The Construction sector is also over-represented compared to the regional average. Despite this, the largest sectors in Merton are Distribution, Hotels and Restaurants and Banking, Finance and Insurance - accounting for over two-thirds of the business base. In Merton's economic areas, there has been a general shift away from Manufacturing and towards Construction since 2003.

Mitcham has seen growth in Distribution and Banking and in Wimbledon there has been an increase in the Public Administration sector. Morden has experienced an expanding business base in Construction and Transport and Communications, while Raynes Park has experienced business base growth in Banking and Public Administration.

The document also identifies several key issues in Merton's economy. The Borough is undergoing a much greater shift towards a base of part-time employment than comparator areas and has also experienced a much greater decline of employment in large businesses than other areas. This could be an indication of a greater decline of traditional industries such as manufacturing and a more universal adoption of small business oriented service economy. Of particular note is the east/west split in employment growth in the Borough over recent years, with Wimbledon and surrounding areas doing particularly well in relative employment growth in comparison to the east of the borough.

The majority of businesses perceive Merton to be a good location for business. More businesses located in Wimbledon or Raynes Park consider Merton is a "growing, dynamic business location" than those located in Mitcham and East Merton or Colliers Wood. Around 70% of businesses would recommend Merton as a business location, particularly those in Raynes Park and Wimbledon. On the whole, smaller businesses tended to rate Merton less favourably than larger businesses. Businesses in Wimbledon rated the Borough higher as a business location than those in Morden and Mitcham and east Merton.



## **Appendix 4**

### Site Assessment Criteria



## Employment Site Assessment Criteria

The proposed criteria for assessing the quality/condition of protected and other existing sites, reflecting the particular circumstances of the Borough are set out below. These criteria mainly relate to the inherent value of a site rather than current conditions on it, although such characteristics would also be noted. Additional criteria would apply to undeveloped allocated/development sites although ownership and availability information may not be possible to obtain in many cases and a judgement may need to be made on these.

Each site is given a score of between 1 and 5 against each criterion (1 = poor, 5 = very good). No individual weightings are attached to different criteria.

Scorings can reflect a combination of different factors applying to the same criteria and a balanced judgment has to be made on an appropriate overall score.

Existing Developed Employment Areas

### **Strategic Road Access:**

- 5 = **Very good:** within 2 Km of strategic road junction/ via good unconstrained roads
- 1 = **Poor:** over 5 Km from strategic road junction/access, and/or through constrained/local roads, and/or through town centre or residential areas etc.

### **Local Accessibility**

- 5 = **Very good local access:** via free moving good roads avoiding residential areas/difficult junctions; unconstrained vehicle access to the site with good visibility/lack of queuing; close access to range of town centre public transport services
- 1 = **Poor:** difficult/narrow road access, via residential roads, difficult site access junction, congested local roads; low level/limited range/infrequent public transport services nearby;

### **Proximity to Urban Areas and Access to Labour and Services**

- 5 = **Very good:** near centre of urban area with wide range of services nearby; proximity to sizeable residential areas providing local labour supply.
- 1 = **Poor:** remote isolated site, no local services or residential areas nearby;

### **Site characteristics and development constraints:**

- 5 = **Very good:** generally level site, regular shape, over 3 ha in size; low flood risk (Zone 1); no conservation or landscape constraints on scale of development; no adverse ground conditions or abnormal development costs; no other significant constraints on new development,
- 1 = **Poor:** sloping/uneven site; under 0.5 ha, irregular/narrow shape, other severe constraints; within flood risk Zone 3; conservation or landscape constraints on scale of development; adverse ground conditions or abnormal development costs

**Proximity to incompatible uses:**

- 5 = Within larger employment area/no incompatible surrounding land use
- 3-4 = B1 use adjoining residential/other sensitive uses;
- 1 = B2/B8 adjoining residential/other sensitive uses;

**Market Attractiveness:**

- 5 = **Very good:** high profile/high quality appearance, managed site; good environment and quality of occupiers; under 10% vacant; viewed as attractive by agents/occupiers; recent investment/development activity, strong demand, units rarely available
- 1 = **Poor:** run-down unattractive appearance/location; attracts lower end users and over 25% vacant space/buildings; vacant units not marketed; no recent investment; units remain vacant for lengthy period;

**Sequential Status:**

Applies to existing/potential office sites only – identifies whether site is in town centre, edge of centre or out-of-centre location in PPS4 terms

**Barriers to Delivery:**

Identify any factors that would constrain development of the site for employment uses e.g. site occupied, need for infrastructure

**Planning Factors:**

Identify any planning designations or policy constraints that could affect development of the site for employment uses.



**Appendix 5**

Assessment of Employment Sites



**List of Sites Assessed (as referenced on Plan 5.1)**

Site No.	Site Name/Address	Size (m <sup>2</sup> )
	<b>Scattered Sites</b>	
S1	264 BURLINGTON ROAD, NEW MALDEN,KT3 4NN	897
S2	GF RIGHT ALBANY HOUSE,300 BURLINGTON ROAD, NEW MALDEN, KT3 4NH	684
S3	PT 1ST FL,141 GARTH ROAD,MORDEN,SM4 4LG	191
S4	124,MIDDLETON ROAD,MORDEN, SM4 6RP	660
S5	R/O,75-77 CANTERBURY ROAD, MORDEN, SM4 6QW	126
S6	CENTRAL WORKS R/O, 48 CENTRAL ROAD, MORDEN	175
S7	UNIT 7 3RD FLR, 341 ROAD, MITCHAM, CR4 4BE	748
S8	UNIT 1 AT 339, ROAD, MITCHAM, CR4 4BE	1363
S9	358-364 ROAD, MITCHAM, CR4 3ND	658
S10	106 HILL ROAD, MITCHAM, CR4 2HR	301
S11	2A LANGDALE AVENUE, MITCHAM, CR4 4AE	205
S12	COMMONSIDE BUSINESS CENTRE, 1 COMMONSIDE WEST	N/A
S13	159 COMMONSIDE EAST, MITCHAM, CR4 2QB	399
S14	339 TAMWORTH LANE, MITCHAM, CR4 1DL	423
S15	WANDLE HOUSE, 10 RIVERSIDE DRIVE, MITCHAM	N/A
S16	32 EVELINE ROAD, MITCHAM, CR4 3LE	1422
S17	245-249 CHURCH ROAD, MITCHAM, CR4 3BH	603
S18	R/O,236 CENTRAL ROAD, MORDEN, SM4 5RT	348
S19	227 CENTRAL ROAD, MORDEN, SM4 5SP	663
S20	2-4 QUINTIN AVENUE, SW20 8LD	474
S21	FRONT WAREHOUSE, 424/426 KINGSTON ROAD, SW20 8DA	1016
S22	492 KINGSTON ROAD, SW20 8DX	109
S23	R/O,49-51 FIRSTWAY, SW20 0JD	227
S24	358B GRAND DRIVE	N/A
S25	14 SEAFORTH AVENUE, NEW MALDEN, KT3 6JP	464
S26	R/O,6-8 SEAFORTH AVENUE, NEW MALDEN, KT3 6JP	61
S27	CAVENDISH HOUSE, CAVENDISH AVENUE, NEW MALDEN, KT3 6QQ	303
S28	R/O 274 BURLINGTON ROAD, NEW MALDEN	N/A
S29	THORNTON HOUSE, THORNTON ROAD, SW19 4NG	557
S30	FARADAY HOUSE, 39 THORNTON ROAD, SW19 4NQ	219
S31	49 MERTON HALL ROAD, SW19 3PR	141
S32	24 KINGS ROAD, SW19 8QN	258
S33	8 BURGESS MEWS, SW19 1ES	781
S34	89B QUICKS ROAD, SW19 1EX	431
S35	145 EFFRA ROAD, SW19 8PU	1228
S36	ADJ 1 BRIDGE VILLAS, ASHCOMBE ROAD, SW19 8JP	67
S37	337-339 HAYDONS ROAD, SW19 8LA	124

Site No.	Site Name/Address	Size (m <sup>2</sup> )
S38	272 HAYDONS ROAD, SW19 8TT	79
S39	270 HAYDONS ROAD, SW19 8TT	80
S40	1 CAXTON ROAD, SW19 8SJ	444
S41	90 GARFIELD ROAD, SW19 8SB	314
S42	R/O,37 DRYDEN ROAD, SW19 8SQ	229
S43	R/O,1-9 TENNYSON ROAD, SW19 8SH	760
S44	R/O,173 HAYDONS ROAD, SW19 8TB	60
S45	163-171 HAYDONS ROAD, SW19 8TB	586
S46	8-10 THE CRICKET GREEN, MITCHAM, CR4 4LA	116
S47	STORE & YARD, BLAKE ROAD, MITCHAM, CR4 3EX	0
S48	201A STREATHAM ROAD, MITCHAM, CR4 2AJ	1
S49	50A WEST BARNES LANE, NEW MALDEN, KT3 4PS	137
S50	ADJ,8 BARNARD GARDENS, NEW MALDEN, KT3 6QG	10
S51	2A STRATHMORE ROAD, SW19 8DB	103
S52	STUDIO 1, 373B DURNSFORD ROAD, SW19 8EF	69
S53	383 DURNSFORD ROAD, SW19 8EF	75
S54	WOODMAN WORKS, 204 DURNSFORD ROAD	N/A
S55	HASLEMERE INDUSTRIAL ESTATE, 20 RAVENSBURY TERRACE, SW18 4RL	488
S56	J BLAKE & CO, RAVENSBURY TERRACE, SW18 4RL	852
S57	27 DENISON ROAD, SW19 2DJ	108
S58	17A SEELY ROAD, SW17 9QP	830
S59	50 DEAL ROAD, SW17 9JW	52
S60	R/O,98 ROBINSON ROAD, SW17 9DR	93
S61	40 FORTESCUE ROAD, SW19 2EB	83
S62	1 DEBURGH ROAD, SW19 1DR	113
S63	UNIT 3, 2 EAST ROAD, SW19 1UW	615
S64	UNIT 4, R/O 37 BRISCOE ROAD, SW19 2AH	544
S65	ADJ 472 ROAD, MITCHAM	N/A
S66	370-374 ROAD, MITCHAM, CR4 4EA	355
S67	392 ROAD, MITCHAM	N/A
S68	390 ROAD, MITCHAM, CR4 4EA	77
S69	328 ROAD, MITCHAM, CR4 3ND	59
S70	149 STREATHAM ROAD, MITCHAM, CR4 2AG	1
S71	175A STREATHAM ROAD, MITCHAM, CR4 2AG	1
S72	R/O, 193-195 STREATHAM ROAD, MITCHAM, CR4 2AJ	1
S73	R/O, 199 STREATHAM ROAD, MITCHAM, CR4 2AJ	1
S74	R/O, 187 STREATHAM ROAD, MITCHAM	N/A
S75	186-190 STREATHAM ROAD, MITCHAM, CR4 2AF	73
S76	223 STREATHAM ROAD, MITCHAM, CR4 2AJ	1
S77	ADJ 37 STREATHAM ROAD, MITCHAM, CR4 2AD	2
S78	29 STREATHAM ROAD, MITCHAM, CR4 2AD	2
S79	245-249 BURLINGTON ROAD, NEW MALDEN, D41	N/A

Site No.	Site Name/Address	Size (m <sup>2</sup> )
S80	251-259 BURLINGTON ROAD, NEW MALDEN, KT3 4NE	N/A
S81	265 BURLINGTON ROAD, NEW MALDEN, KT3 4NE	N/A
S82	11 BERKELEY PLACE, SW19 4NN	102
S84	58+ R/O 60 DURHAM ROAD, SW20 0TW	23
S85	RUTLISH AUTO CARE CENTRE, RUTLISH ROAD, SW19 3AL	359
S83	THE OLD BAKERY, 2D EDNA ROAD, SW20 8BS	27
S86	PT 1ST FLR, 183 KINGSTON ROAD, SW19 1LH	64
S87	159 KINGSTON ROAD, SW19 1LJ	692
S88	169 GLADSTONE ROAD, SW19 1QS	69
S89	171-173 GLADSTONE ROAD, SW19 1QS	23
S90	46-76 SUMMERSTOWN, SW17 0BH	1514
S91	ALPHA HOUSE R/O,92 DURNSFORD ROAD, SW19 8HQ	3916
S92	17 RODNEY PLACE,SW19 2LQ	195
S93	14-20, BLENHEIM BUSINESS CENTRE, LOCKS LANE, MITCHAM, CR4 2JX	100
S94	1A GARDEN AVENUE, MITCHAM, CR4 2EE	119
S95	55-57 MANOR ROAD, MITCHAM, CR4 1JJ	70
S96	43-45 PALESTINE GROVE, SW19 2QN	160
S97	133 ROWAN ROAD, SW16 5HU	61
S98	170 MERTON HIGH STREET, SW19 1AY	103
S99	178 MERTON HIGH STREET, SW19 1AY	63
S100	TREX IMPORT, 101 HAMILTON ROAD, SW19 1JG	258
S101	MR MATTHEW SMITH T/A ELUCID8, UNIT, 21 CROWN LANE, MORDEN, SM4 5BY	196
S102	13 CROWN LANE, MORDEN, SM4 5BY	535
S103	16-18 BUCKFAST ROAD, MORDEN, SM4 5LY	106
S104	166-168 ROAD, MORDEN, SM4 5AT	1030
S105	120 ROAD, MORDEN, SM4 5AT	75
S106	3-4 & 10C-10D CRICKETERS COTTA, 1-4 LOWER GREEN WEST, MITCHAM, CR4 3AF	370
S107	SUITE B 60, CHURCH ROAD, MITCHAM, CR4 3BU	79
S108	ALPINE WORKS, HALLOWELL CLOSE, MITCHAM, CR4 2QD	256
S109	GND FLR BALTIMORE HOUSE, GRIFFITHS ROAD	47
S110	BRITANNIC HOUSE, 230 BURLINGTON ROAD, NEW MALDEN, KT3 4NN	N/A
S111	135 (UNITS A,B,C) GARTH ROAD, MORDEN, SM4 4LF	N/A
S112	303-305 MITCHAM ROAD, SW17 9JQ	N/A
S113	THE COURTYARD 7, FRANCIS GROVE,	N/A
S114	ELM GROVE BUSINESS CENTRE, ELM GROVE, SW19 4HZ	N/A
S115	INTEGRA HOUSE, 138 ALEXANDRA ROAD, SW19 7JY	N/A
S116	UNITS (1 - 6)WELLINGTON WORKS, WELLINGTON ROAD, SW19 8EQ	N/A
S117	15 -21 YORK ROAD, SW19 8TP	N/A
S118	34-36 WEST BARNES LANE, SW20 0BP	N/A

Site No.	Site Name/Address	Size (m <sup>2</sup> )
S119	28-30 WEST BARNES LANE, SW20 OBP	N/A
S120	209 MERTON ROAD, SW19 1EE	N/A
S121	BROOKFARM HOUSE, 1 STATION ROAD, SW19 2LP	N/A
S122	110-112 MORDEN ROAD, SW19 3BP	N/A
S123	SHANNON COMMERCIAL CENTRE, 208-212 BURLINGTON ROAD, NEW MALDEN, KT3 4NF	N/A
S124	UNITS at 1A, COWPER ROAD, SW19 1AA	N/A
S125	66 - 67, ALWYNE ROAD, SW19 7AE	N/A
S126	DOVER HOUSE, 141 MORDEN ROAD, MITCHAM, CR4 4DG	N/A
S127	5 ROWAN ROAD, SW16 5JF	51
S128	AUTOTUNES GARAGE, LITTLERS CLOSE+D40	80
S129	1ST F SOUTH PICFARE HOUSE, 197 ROAD, MORDEN	288
S130	4TH FLR 6-10, ST GEORGES ROAD,	1581
S131	GND F, 19 THORNTON ROAD, SW19 4NG	80
S132	22-24 CAXTON ROAD, WIMBLEDON	N/A
S133	60 THE CRICKET GREEN, MITCHAM	N/A
Site No.	Strategically or Locally Significant sites	Ha
E1	MORDEN (SOUTH WIMBLEDON INDUSTRIAL AREA)	34.2
E2	NELSON TRADING ESTATE, MORDEN ROAD, COLLIERS WOOD	2.37
E3	PRINCE GEORGE'S ROAD, COLLIERS WOOD	6.09
E4	GAP ROAD, WIMBLEDON	3.57
E5A	DURNSFORD ROAD A, WIMBLEDON	2.26
E5B	DURNSFORD ROAD B, WIMBLEDON	9.82
E6	PLOUGH LANE, WIMBLEDON	14.47
E7	WILLOW LANE, MITCHAM	43.8
E8	HALLOWFIELD, MORDEN ROAD, COLLIERS WOOD	7.64
E9	STREATHAM ROAD, MITCHAM	5.92
E10	DUNDONALD ROAD, WIMBLEDON	4.55
E11	BURLINGTON ROAD A, NEW MALDEN	2.5
E12	BURLINGTON ROAD B, NEW MALDEN	4.36
E13	MALDEN WAY, NEW MALDEN	0.85
E14	BUSHEY ROAD, NEW MALDEN	3.69
E15	GARTH ROAD, MORDEN	9.6
E16	RAINBOW INDUSTRIAL ESTATE	2.5

**Appendix 6**

Site Appraisals

## SUMMARY APPRAISAL OF STRATEGICALLY/LOCALLY SIGNIFICANT AND LOWER QUALITY SITES

- 1.1 The following sections consider the suitability for on-going employment uses of the assessed sites within each of the Borough's main sub-areas – Greater Wimbledon (including Raynes Park and Colliers Wood), Morden, and Mitcham/East Merton. It needs to be emphasised that this assessment does not imply that developing a site for any particular use identified would be acceptable and that any development proposals on these sites would need to meet relevant national, regional and local policies.

### Greater Wimbledon Area

- 1.2 In this sub-area, the sites assessed included 12 larger, Strategically or Locally Significant Employment sites with a total site area of almost 89 ha and 59 small scattered sites with a combined site area of 5.9 ha.

### Strategically and Locally Significant Sites

- 1.3 All the 12 Strategically or Locally Significant sites in this area were assessed as good or average quality. Six of these sites ranked as 'good quality', five of which were located in the West Barnes/Raynes Park area and scored well due to their excellent strategic road access and proximity to a large range of local services and facilities. The factors underlying these "good quality" assessments are summarised below.
- 1.4 **Burlington Road B** (E12) on Beverley Way in New Malden was the top ranking allocated site within Wimbledon and the Borough as a whole. This estate includes a range of B1, B2, B8 and A1 uses in a highly accessible location with good access to a range of local facilities and services. It has a high profile location with large, good quality and reasonably modern units and low vacancy, and remains suitable for a range of employment uses including B1 - B8. One vacant plot is available for development on this site.
- 1.5 The **Malden Way** site (E13) on Burlington Road, New Malden is a large modern office development on a 0.85 ha site, which benefits from excellent strategic road access beside the A3 and proximity to a wide range of service and facilities in the surrounding area. The site is very high profile, adjacent to the A3 and its reasonably modern office premises are fully occupied. There are some development constraints in relation to flood risk but overall the site is highly suitable for B1 office use.
- 1.6 The **Raynes Park (Rainbow Industrial Area)** (E16) provides a range of unit sizes for B1 - B8 uses on a 2.5 ha site and is generally well occupied with the exception of a few units (3,000 m<sup>2</sup>) currently being marketed. It benefits from very good strategic access to the A3 as well as good access to local services in Raynes Park and local labour in the surrounding area. It is not within an area at



risk of flooding and not constrained by any surrounding land uses since it is bounded on all sides by railway lines. Given its good level of occupancy, reasonable quality of its units and good road access, this should remain as an allocated industrial site, particularly to serve businesses that would not operate well in more residential areas.

- 1.7 **Durnsford Road B** (E5B) is a large (9.8 ha) estate located towards the north of the borough, on Durnsford Road, approximately 1.5 km north of Wimbledon town centre. This site has good strategic and local road access and is close to local labour and services. It has fairly high profile and contains a range of B1, B2 and B8 units, which are predominantly modern and in good condition with very low vacancy. Although partly affected by flood risk and River Wandle policies on its eastern boundary, the site is otherwise free from development constraints. Overall, this site is a key industrial area in the north of the Borough and should continue as an important location for B1 - B8 employment uses.
- 1.8 **Burlington Road A** (E11) is a medium sized estate (2.5 ha) and benefits from the same qualities as its neighbouring employment sites with regard to accessibility and proximity to labour and services. In particular, it has very good access to the A3. It contains a large number of B1- B8 units as well as some A1 and D1 uses. However, a primary school in the centre of the site, dividing it into two halves, could form a constraint to industrial operations. The main access is Burlington Road, which can be congested due to heavy traffic volumes and there is also a flood risk issue in this location. The industrial units here are also of mixed quality but fully occupied. Overall this is also a good quality industrial site, which should be retained as such.
- 1.9 The **Bushey Road** site (E14), New Malden is another medium sized site (3.5 ha) with a high profile location and also with excellent road access adjacent to the A3. It contains a range of fairly modern, good quality units with a mix of B1, B2, B8 and A1 uses. As with other employment sites in the vicinity, there is excellent access to labour and local facilities nearby. Its drawbacks include some flood risk while local road access to the site could be improved, and adjoining residential and school uses are not ideal. However, the site is considered to be suitable for a range of employment uses, primarily B1, B2, B8 and also continued use for some retail warehousing, and should continue to be retained as a mainly industrial site.
- 1.10 Six out of the Allocated sites in this sub-area were rated as 'average quality', largely due to these estates having various environmental constraints or some levels of road access restriction.
- 1.11 **Morden (South Wimbledon Industrial Area)** (E1) is the highest ranked 'average quality' site within the Greater Wimbledon area and fell below a 'good quality' ranking largely due to its poorer strategic road access. However, the estate comprises a very large employment area (34.2 ha) able to accommodate a wide range of B1, B2, B8 and bulky retail uses. It is a high profile estate within the centre of the Borough, adjoining the south east corner of Colliers Wood centre. There has been recent investment in new premises and, whilst vacancy is

currently above average at 10-20%, there is also evidence of active marketing. Overall, this site remains suitable for a range of primarily B1 – B8 uses.

- 1.12 **Durnsford Road A** (E5A) is a medium sized estate (2.3 ha) located on Durnsford Road further north of the Weir Road Industrial Estate. It is largely occupied by B2 and B8 uses within a range of good quality, relatively modern units. The site is well located in terms of strategic access and has few environmental or development constraints. Its drawbacks are lack of nearby services and some adjoining residential uses. However, occupancy is very high and this site should remain suitable for mixed B1, B2 and B8 units and may be particularly suited to starter units.
- 1.13 The **Dundonald Road** site (E10) is a medium sized (4.5 ha), single occupier employment site on Toynbee Road, 150 metres south of Wimbledon town centre. It performs less well on accessibility, being distant from strategic routes and accessed off a residential road with on-street parking and a one way system. However, proximity to Wimbledon town centre gives it very good access to public transport and local labour and services. The site is relatively low profile but fully occupied and remains suitable for its current use, or potentially for other, smaller scale, B1, B2 and B8 uses and uses requiring open storage.
- 1.14 **Prince George's Road** (E3) is a large (6.1 ha) industrial estate which adjoins the south east boundary of Colliers Wood centre. It contains B1, B2, B8 and A1 uses within a mixed employment area with some new units and some older, less attractive units. The area has a reasonable profile but relatively high vacancy of 15-20%, although such units are being actively marketed. Its proximity to Colliers Wood gives the estate excellent access to a range of local services and facilities. Its only significant drawbacks are flood risk affecting part of the site and some adjoining areas of environmental importance. The area is suitable for continued employment use including B1, B2, B8 and retail warehouses and has some plots available for development.
- 1.15 The **Plough Lane** site (E6) is located to the south east of the Weir Road Industrial Estate. Road access is reasonable but the site is distant from local services. This large estate (14.5 ha) contains a wide range of employment uses, including B1, B2, B8, bulky retail and sui generis uses. The majority of units are of a reasonable age and quality and vacancy is low. Drawbacks include flood risk and potential constraints from a conservation area and nature conservation factors. Despite this, this site forms part of an important employment corridor in the north of the Borough and is suited to continued employment use with a range of B1, B2 and B8 units suitable for this location.
- 1.16 The **Gap Road** site (E4) lies to the north of Wimbledon town centre and is dominated by a dairy operation but with other B1, B2 and B8 uses. The site is located off a busy road within a predominantly residential area but has few development constraints. Road access is moderate but it is distant from local services. Vacancy is low at 5% and units are being actively marketed. The quality of the units on the site is mixed, with some relatively modern but the

dairy premises is in poor condition. Overall, the site appears adequate for its current use and for B1, B2 and B8 uses.

1.17 Overall, all the Allocated sites in Greater Wimbledon perform well or reasonably well and justify retention.

### **Scattered Sites**

1.18 Of the 59 scattered sites assessed in Greater Wimbledon, a relatively high 21 (or 35%) were categorised as good quality sites, which should be retained for their current or similar uses, and where no actions or interventions are likely to be needed. In general, in this area, such sites performed well due to reasonable road access, few incompatible adjoining uses for the site's current use and good quality, modern premises in a reasonable environment. This was typically indicated by high occupancy of premises. This sub-area had a higher proportion of sites in the good quality category than Morden and Mitcham.

1.19 This category included examples of particularly good quality sites such as:

- the development of small, modern office units at Burgess Mews;
- Thornton House, a modern 3 storey development of small B1 units in a residential area;
- good quality office developments on Burlington Road, including No. 230, 264 and 265 Burlington Road and Cavendish House;
- town centre offices at 6-10 St Georges Road, 138 Alexandra Road and 7 Francis Grove.

1.20 There were also a range of fairly average quality sites and premises, 43 in total in this area. Many sites failed to achieve a good quality rating due to deficiencies in only one or two factors. For example, well occupied sites with premises in good condition sometimes had poor road access and vice versa. A number of sites, including some existing allocated industrial areas, performed less well due to development and environmental constraints, for example where being within Flood Zone 2 or 3 and/or adjacent to a nature conservation site or similar conflicting land use.

1.21 Some sites at the higher end of the average quality range included:

- Albany House, 300 Burlington Road, which benefited from its location in close proximity to a wide range of local services and facilities and its accessibility to the strategic road network.
- Sites on Haydons Road such as 337-339 Haydons Road and 163-171 Haydons Road scored highly across all categories but lost ranking on relatively poor access to the strategic road network.
- Both Woodman Works on Durnsford Road and the Haslemere Industrial Estate on Ravensbury Terrace scored well across all categories and both contribute to the strong employment hub in the north of the borough.

- 1.22 Looking specifically at the 8 sites which were assessed as of lower quality, these tended to have very poor access, often within narrow, heavily parked residential roads. Many are closely adjoined by other uses, mainly residential, that are more likely to be incompatible with the site's current or likely use. Some are very small, irregular shaped sites that are difficult to develop. Often these sites are vacant or with low occupancy or in low value uses. These are considered in more detail below.
- 1.23 The site at the rear of **37 Dryden Road** (S42) is occupied by a roofing business and comprises a long, narrow yard with a poor quality unit to the rear. Access to the site is poor, between two residential properties, and it is closely bounded by residential development on all sides, which limits the potential to redevelop for other B class uses, or occupation by another low cost use, if the current use ceased. These factors lead to a low ranking but the site is occupied and serving a local need. It may be a candidate for release to other uses in the longer term, with residential a possible use, but only if the current use ended and it was not possible to re-use it for another employment generating use.
- 1.24 Land to the rear of **173 Haydon's Road** (S44) contains a very small warehouse unit associated with the mechanical service contractor in 173 Haydon's Road. It has very narrow vehicle access from a residential road and is closely surrounded by development, including a church to the south. At is attached to 173 Haydon's Road, this unit has very limited potential other than as an ancillary use to the main unit. These factors produce a low ranking but, unless it is causing amenity impacts, the site appears adequate for its current low key use.
- 1.25 Unit 4, at the rear of **37 Briscoe Road** (S64) comprises a carpentry/joinery business within a back land development with other B1 (light industry) and B2 uses, and completely surrounded by residential development. The site has poor access and due to its constrained location, no scope for expansion or intensification, leading to a low ranking as an employment site. However, the site appears fully occupied and is adequate for small scale B1/B2 uses, particularly starter units.
- 1.26 The rear of **49-51 Firstway** (S23) comprises a series of small garage-style units with unknown uses and occupancy levels. The site is very low profile and access is via a road off Firstway, a residential cul-de-sac. A railway line runs above the northern boundary of the site. The site has an unattractive environment with no obvious potential for development of B1 office uses. There may be potential for small B1/B2 workshop units to be developed, although viability would be uncertain. Otherwise, if not required for their current use, this site may have scope for residential use.
- 1.27 Land adjacent to **1 Bridge Villas, Ashcombe Road** (S36) is a cleared site with potential for development. It is adjacent to a railway bridge, with poor visibility and poor strategic road access. There is possible scope for a small scale B1 use, particularly if access to the site can be obtained through the existing industrial area to the rear; otherwise, it has potential for residential development.

- 1.28 The site to the rear of **98 Robinson Road** (S60) is tightly constrained with access via a narrow, poorly surfaced access route off Robinson Road. It is currently occupied by a vehicle repair business and appears adequate for its current use. These factors and the site's isolated nature results in its low ranking as an employment location. Subject to no adverse amenity impacts, it appears adequate for its current use, and may have some potential for other small B1 workshop uses. It would have scope for residential use if the current uses ceased and the site could not be re-let for B-class uses.
- 1.29 **Unit 3, 2 East Road** (S63) currently comprises a A1/B1 use as a base for a scuba diving organisation, which includes a shop for diving equipment. The unit is located on a larger trading estate with mixed B1/B2 units adjoining to the north and south. The site has very poor access, located on a cul-de-sac within a dense residential area. Congestion is exacerbated by the school located opposite the site during drop off/pick up times. The site is included within the UDP Site Proposal Allocation 40P (East Road Trading Estate). It appears adequate for its current use and has some potential for other small scale B1 and B2 uses, particularly small starter units / workshops.
- 1.30 The site at **145 Effra Road** (S35) is a vacant, former joiner's site, with very poor site access and immediately adjoining residential and community uses. Its irregular shape, to the rear of houses, would make development of other B1 uses difficult and it seems unlikely to be attractive for such uses. Current units are in poor condition and not suited to re-occupation by other low cost businesses. These factors lead to a low ranking and make it a candidate for release to other uses, the most obvious being residential.

## Morden Sub-area

- 1.31 Within this sub-area, there were two larger Locally Significant employment sites with a total site area of some 11.9 ha and 34 small scattered sites with a combined site area of only 1.37 ha.

## Strategically and Locally Significant Sites

- 1.32 The two Locally Significant sites within the Morden area ranked as 'average quality' within the site assessment, largely due to incompatible adjoining uses and strategic or local access issues.
- 1.33 **Nelson Trading Estate** (E2) is a smaller estate (2.4 ha) on Morden Road, located 0.7 km west of Colliers Wood centre. It contains a range of B1, B2, B8 and bulky retail uses with reasonably modern, high quality units. Whilst not well located in terms of strategic access, the trade park performs well in relation to local road access, with good access to public transport and wide, well maintained internal roads throughout the estate. Residential uses nearby on one side are a drawback but vacancy is low and, overall, the trade park remains suitable for B1, B2, B8 uses. It may also be able to accommodate retail warehouse uses if this was acceptable in policy terms.

1.34 **Garth Road** (E15) is a larger industrial estate (9.6 ha) located in the far south west of the Borough and contains a range of B1, B2, B8 and sui generis uses. The units range widely in terms of their age and quality and the estate suffers from adjoining residential uses on two sides. Strategic road access is moderate and it also lies within a largely residential area, with congestion and traffic calming measures reducing local accessibility. There are few services locally. However, vacancy rate is average at 10%, with active marketing of any vacant units. The estate remains suitable for its existing range of uses including B1, both offices, and light industrial, B2 and B8 uses.

### Scattered Sites

1.35 Among the 34 scattered sites in the Morden area, 8 (or 24%) were categorised as good quality sites, which ought to be retained in their current or similar uses, and where no actions or interventions are likely to be needed. As elsewhere in the Borough, in this area, such sites performed well due to reasonable road access, few incompatible adjoining uses for the site's current use and good quality, modern premises in a reasonable environment. This group included sites of particularly good quality such as:

- Britannic House, 230 Burlington Road, New Malden, a reasonably modern office block located near the A3 and with good public transport links;
- 183 Kingston Road, a small office unit in older premises but benefiting from good road, public transport and services accessibility.

1.36 There were also a variety of average quality sites and premises, 23 in total in this area. Such sites differed greatly on individual assessment factors, with several otherwise good quality employment sites ranking lower than might be expected due to having poor strategic access or conflicting adjoining uses. As with the average quality sites in Greater Wimbledon, it is important to look at the individual site assessment factors in this category to understand the reasons for the lower ranking.

1.37 Some examples of sites at the higher end of the average quality range included small office premises on the Trex Import site at 101 Hamilton Road and 170, 178 and 209 Merton Road. These are older premises with moderate road access but benefit from town centre facilities and no incompatible uses and so are reasonably fit for their current purpose.

1.38 With regard to the 3 scattered sites which were assessed as being of lower quality, these sites were more likely to suffer from poor quality units and unattractive environments than those in the Greater Wimbledon area. Sites in this category usually had poor access, either strategic or local and often conflicted with surrounding uses. Most sites within this category would be difficult to develop for employment purposes, outside their current use. Individual sites are considered in more detail below.

1.39 The site at the rear of **236 Central Road** (S18) comprises an isolated unit/warehouse located to the rear of residential dwellings on Central Road and a large greenfield area to the east, with a primary school beyond. It is

accessed via a narrow path, to the rear of the dwellings that front Central Road. It is unclear whether it is currently occupied. Although not well located for B8 uses, it appears to have potential for small scale B1c/B2 uses. There may also be potential to redevelop the site with adjacent land to the west. However, the site is adjacent to a UDP Site Proposal (29P – Abbotsbury Field), which may affect future uses. Overall, this site ranks poorly due to its very low profile and poor access, limiting the range of uses it could accommodate.

1.40 The units and land associated with **227 Central Road** (S19) are currently vacant and being marketed as workshops and office premises with enclosed yard. The site is located between two residential dwellings in a predominantly residential area. The units are relatively old, unattractive and in poor condition and may be difficult to let other than for a very low cost use. This site has potential to be used for small scale B1/B2 uses but there is scope for residential if the site cannot be re-let or redeveloped for a B-class use.

1.41 The site at **13 Crown Lane, (S102)** is currently used as a builder's yard for a local scaffolding company. It lies close to Morden town centre but access is via heavily trafficked routes. Given its existing use, the site's appearance is poor and contains small, single storey sheds and outbuildings in poor condition. Despite these limitations, the site is adequate to serve a local need for low cost uses needing open storage and could be retained as such. It may have limited scope for other employment generating uses if it became vacant but may find it difficult to attract new development. It would have potential for residential uses in the long term if it could not be re-occupied by other B uses or construction activities in the future.

1.42 Overall, most scattered sites in the Morden area fall into the average quality range but with very few offering potential for release to other uses.

## Mitcham & East Merton Area

1.43 In this sub-area, three larger Allocated Employment sites were examined with a total site area of 57.4 ha and 40 small scattered sites with a combined site area of only 2.37 ha.

1.44 The three Strategically or Locally Significant sites within the Mitcham and East Merton area ranked as 'average quality' within the site assessment, largely due to the estates having either poor compatibility of adjoining uses or a series of environmental or development constraints.

1.45 The **Streatham Road** site (E9) is a medium sized (6 ha) industrial estate located on Streatham Road, 500 metres north east of Mitcham town centre. It contains a range of B1, B2 and B8 uses with reasonably modern units, in good condition. Road access is moderate and its main drawback is adjoining residential developments that overlook significant parts of the site and a primary school to the rear. Despite this, the vacancy level is average at 10%, with active marketing of any vacant units, and the estate is suited to its current use with a mix of B1, B2 and B8 uses and potentially retail warehouses.

1.46 The **Willow Lane** site (E7) is a very large (43.8 ha) mixed employment area located on the southern edge of the Borough, where access to strategic roads is less good. It contains many waste related uses which affect the local environment while there is heavy street parking and congestion problems within estate. Local road accessibility is good, however, and the estate contains a range of B1, B2 and B8 uses, within a series of small individual estates. Premises are mixed in age condition but average overall and overall vacancy is low at 5-10%. Some areas to the west of the estate are affected by flood risk and nature conservation issues. Overall, this is a lower profile, rather isolated location but there are proposals for environmental upgrading and it provides a very large, coherent area of industrial land that is still suitable for its current mix of B1, B2 and B8 and waste related uses.

1.47 **Hallowfield** (E8) is a medium-large (7.6 ha) industrial estate located between the town centres of Mitcham and Morden and includes Liongate Enterprise Park. It has a range of B1, B2 and B8 uses and most of its units are modern, with no apparent vacancies. Its drawbacks are poor strategic access, a relatively low profile location, no local services and residential uses adjoining on three sides. Despite this, the site is reasonably suited to continued use for B class uses.

### Scattered Sites

1.48 Among the 40 scattered sites, 6 were categorised as good quality sites, where it is likely that no interventions should be needed and the sites can usually be retained in their current or similar uses. On a general note, sites in this area scored highly mainly due to good road access, both strategic and local, the lack of incompatible adjoining uses and having reasonably high quality, modern premises in a reasonable environment. This was typically indicated by high occupancy of premises. There were clearly much fewer good sites in this sub-area than in Wimbledon and the better sites here were less good than in the latter area. However, there are a number of sites of better quality such as:

- the Community Hall adjacent to Cricket Green at 326 London Road, a good quality, period building with good transport access and access to services;
- 341 London Road, a reasonably modern, purpose built small office block with good access to public transport and services;
- Dover House, an office and storage development Morden Road with good road access.

1.49 There were also a range of fairly average quality sites and premises, 20 in total in this area. As with similarly scoring sites within Greater Wimbledon and Morden, sites ranked in this category tend to differ as to whether they receive average scores across the assessment criteria or have one assessment category such as access or development constraints, which reduce the site's overall score. It is important to look at the individual site assessments for sites in this category to understand the overall ranking level.



- 1.50 Some sites at the higher end of the average quality range included:
- the Commonside Business Centre is a high quality, though older, office building situated in an attractive environment adjacent to Mitcham Common;
  - Wandle House on 10 Riverside Drive is a mixed use building, which includes educational uses. The site suffers from poor strategic accessibility and a number of environmental constraints related to the River Wandle;
  - 358-364 and 370-374 London Road are adjoining sites which score highly across all assessment criteria except strategic road access.
- 1.51 This sub-area had a higher proportion of lower quality sites (33% of the total) than other areas, although only 13 in total. As with those in the Greater Wimbledon and Morden areas, these sites tend to suffer from poor access and typically comprise small, irregular shaped sites that would be difficult to develop. The lower quality sites within the Mitcham and East Merton area tended to be located within predominantly residential areas, often as back land development or to the rear of a residential dwelling. These deficiencies are considered in more detail below.
- 1.52 The site at **2A Langdale Avenue** (S11) contains a small motor vehicle repair and maintenance business, with very poor site access off a narrow, poorly surfaced alley. A range of uses back onto the site, including the rear of London Road commercial properties, rear gardens of residential dwellings and car parking for an office block on Elmwood Road. This site suffered from the poor quality of the existing unit coupled with its very low profile and poor access. Despite this, there appears no reason why it should not continue in its current use for some time, subject to any local amenity impacts. In this location, there are no obvious alternative uses for the site if the current use were to cease.
- 1.53 The rear of **193-195 Streatham Road** (S72) comprises a sub-standard quality unit within a poorly surfaced courtyard, which is accessed via a narrow path from Melrose Avenue. The site is largely surrounded by residential dwellings, although a development site adjoins the site to the west with planning permission for a mixed used scheme of commercial and residential units. It is not clear if the site is currently occupied but it may have potential to be used for small scale B1 uses, or redeveloped as part of the adjoining mixed use scheme.
- 1.54 The site at **106 Hill Road** (S10) consists of a vehicle maintenance business, which is run from a small unit and possibly a small number of garage units, at the end of a residential cul-de-sac. The current use appears to conflict with the residential dwellings on Hill Road by causing congestion with vehicles from the business parked on the street but continue in this use provided this is not causing unacceptable amenity effects. The site would also have potential to remain occupied by another small scale B1/B2 use with less traffic generation.

In the longer term, there would be scope for residential if the current use was to cease and the site could not be re-let for another B1 use.

- 1.55 The site at **50 Deal Road** (S59) is a scrap/storage yard located between residential dwellings. The current use of the site is not ideal for its location as it creates an untidy, unattractive environment within a predominantly residential area. It appears to operate adequately in its current use. It is difficult to relocate a scrap metal business and the current site use should be retained unless there are adverse impacts on residential amenity. There would appear scope for small scale B1 units in the medium-long term although uncertainty whether new space would be built in this location. If not, and the current use ceased, the site has potential for residential.
- 1.56 The **Store & Yard at Blake Road** (S47) lies at the end of a residential cul-de-sac and is entirely surrounding by residential uses. The site suffers from poor strategic and local road access and a lack of nearby local services and facilities. It is currently occupied, but intrinsically linked to the adjoining residential dwelling. There are very limited options if the current use ceased and it is likely that the site would be used as a back garden or garage for No. 2 Rodney Road, unless a new occupier wanted to use the site as a small workshop.
- 1.57 The office and community unit at **133 Rowan Road** (S97) is within a residential area opposite a supermarket. It suffers from poor strategic road access and is isolated in terms of its location to other compatible adjoining uses. The site is occupied but intrinsically linked to the adjoining vacant retail unit and residential unit. It is currently occupied. Should it become vacant in the longer term, and cannot be re-let for offices or community uses, it would be suitable for ground floor retail or conversion to residential.
- 1.58 The workshop and storage unit at **1A Garden Avenue** (S94) lies on a narrow residential road off the A216 Streatham Road. Although there are some local shops on the main road, it lacks access to public transport and strategic access routes. The building is unattractive and of poor quality highlighted by the fact that it is currently vacant. It also suffers from a lack of on-site parking and immediately adjoining residential uses. Despite these drawbacks, the site should have scope for other small B1 uses.
- 1.59 The Grade II listed property at **60 Church Road** (S107) is an attractive period building which is currently being refurbished. It is not a purpose built office building, but suited to local businesses. It has poor strategic and local road accessibility and is isolated from the nearest centres. However, it should be generally suitable for small scale, low cost local office firms. It would also have long term residential potential if it failed to attract B1 tenants.
- 1.60 **1-4 Lower Green West** (S106) comprises relatively old buildings used for light industrial purposes within the Mitcham Cricket Green Conservation Area. It is near a local parade of shops and residential area, but does not have good public transport links or access to strategic routes. Surrounding uses include residential, some retail and fire brigade station. Although currently occupied,

the buildings are in poor condition with a run down, unattractive rear yard with narrow and difficult access. The unit appears to be adequate for its current use. Should it become available in the medium-long term, there may be scope for small B1 office uses, although it appears likely that new building would occur in this location.

- 1.61 The **Alpine Works, Hallowell Road** (S108) is situated at the end of a narrow residential cul-de-sac. It comprises two single storey buildings of relatively poor condition used for as workshops and storage. It is close to local A roads but some distance to strategic routes. The site is also constrained by a railway line to one site and school to the other. Despite this, there is an unimplemented planning permission for the demolition of the workshop/storage units and erection of a two storey television studio with ancillary offices. The site therefore appears to have reasonable potential to attract B1 uses and should be retained for this.
- 1.62 The site at **55-57 Manor Road** (S95) is currently used occupied as offices with ground floor retail units within a small parade. These offices are of poor quality, generally run down and of an unattractive appearance. Although occupied, the office units are isolated with no direct access to strategic routes and some distance from the nearest public transport. Applications for use of the rear of the site for hand car wash and vehicle tyre fitting centre have been refused due to the adverse impact on the amenity of neighbouring occupiers. There are no obvious alternatives to the site's current use but it could continue to supply some low cost, if low quality office space.
- 1.63 **5 Rowan Road** (S127) is occupied by a tyre fitting business. It adjoins a Petrol Filling Station and a cemetery to the rear. It is of poor quality appearance and unattractive given its prominent position on the B272. It is also a fairly isolated site with no access to any strategic routes or public transport except one bus route. There factors lead to a low ranking, but it is currently occupied and appears adequate for its current use or, subject to amenity impacts, for some other small scale, vehicle related uses.



**Appendix 7**            Methodology for Estimating B Class  
Employment Space



## **Methodology for Estimating B Class Employment Space**

This appendix provides details of the different approaches used to estimate future B Class employment space requirements and the various assumptions used in that process.

Given the uncertainties involved in forecasting over a plan period in excess of 10 years, estimated employment floorspace requirements should not be expressed too precisely and the figures in this section are rounded to the nearest 100 m<sup>2</sup>.

### **Different Approaches**

The implications of the different approaches to assessing Merton's future employment land needs and the factors affecting these are set out below.

### **Employment Growth**

Two sets of employment forecasts have been considered in this study - Borough level forecasts up to 2021 produced by the GLA, and more detailed forecasts of employment growth by sector for Merton up to 2021, prepared by Experian Business Strategies in spring 2010. Such forecasts tend to be more reliable at regional and national scales than at the local economy level, but can indicate the broad scale and direction of economic growth in different sectors and provide some guidance to assess future land requirements. Both these forecasts reflect the effects of the recent recession. Appendix 7 contains detailed job forecasts by sector.<sup>1</sup>

As these forecasts' base dates of 2009/10 were not long after the low point of the recession, even a return to recent job levels in future would suggest significant job gains, even though that future level of jobs could be accommodated in the same amount of employment space as it was immediately before the recession. In other words, there is likely to be a significant 'hangover' of underused commercial space resulting from the recession which will need to be filled before new space is required. For these reasons, job change between 2008-21 (rather than 2009-21) has been taken as a better guide to likely future job growth and employment space needs.

The employment forecasts prepared by the GLA for the London Boroughs in late 2009 are considered first since these are intended to form the basis for employment land studies in London (Table A6.1). The GLA's trend based forecasts have limitations for this study in that they do not have any breakdown by individual economic sectors. The GLA's triangulated forecasts are also not ideal for estimating future requirements as they reflect site capacity as well as demand for employment space and other factors, rather than just job demand. For Merton, both types of forecast indicate quite low job growth between 2008-

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<sup>1</sup> The Experian job forecasts estimate total employment including workers who are self-employed, some of which may work from home or on a hot-desking basis

21 (2.5%) compared with quite significant growth (almost 9%) for London as a whole.

Table A6.1 GLA Trend Based & Triangulated Employment Projections by Borough (,000s of Jobs)

	2008 *	2011	2016	2021	% change 2008-21
<b>Merton (Trend based)</b>	81	82	82	83	2.5%
<b>Merton (Triangulated)</b>	82	83	83	84	2.5%
<b>London (Triangulated)</b>	4,706	4,797	4,953	5,114	8.7%

Source: GLA Working Paper 39, Borough Employment Projections to 2031, Nov 2009

\* 2008 figure interpolated from 2007 and 2011 data

However, subsequent breakdowns of these forecasts into broad sectors were commissioned by the GLA and these indicate the following levels of job growth in Merton within industrial and office based sectors (Table A6.2). This indicates continuing strong decline in industrial jobs and modest growth in office jobs up 2021. This would produce a net loss of B class jobs in Merton over that period.

Table A6.2 GLA Employment Projections for Merton by Sector

	2008*	2011	2016	2021	2008-21
<b>Industrial Jobs</b>	17,150	16,400	14,900	13,700	- 3,450
<b>Office Jobs</b>	19,425	20,100	20,900	21,600	+2,175
<b>All B class Jobs</b>	36, 575	36,500	35,800	35,300	- 1,275
<b>All Jobs**</b>	81,910	82,700	83,300	84,300	+2,390

Source: GLA Technical Report, London Employment Time Series, R. Tym & Partners, March 2010

\* 2008 figure interpolated from 2007 and 2011 data \*\* All Jobs includes B and Non B class jobs

The Experian forecasts of employment growth by sector reflect recent trends in the Borough and are based on projections at regional level, and how economic sectors in Merton have fared relative to the London economy's growth in the past. The overall employment change in Merton resulting from these forecasts is shown in Table A6.3 along with expected job growth in each of the main B class sectors. The figures for B class uses include an allowance for jobs in some non B class sectors which typically utilise industrial or office space, such as some construction uses, vehicle repair, courier services, road transport, cargo handling and some public administration activities.

These indicate only modest net job gains (1,385 jobs) in the B-use classes overall in Merton over the period to 2021, with strong growth in office based activities and a small gain in distribution/warehousing employment partly offset by continuing job losses in manufacturing. This is within the context of overall job growth of just over 2,250 jobs predicted for the Borough over the period, mainly in business/financial services but also in retailing and catering, health and construction. The Experian forecasts therefore suggest slightly higher job



growth is possible in Merton than implied by the GLA estimates along with stronger office job growth and larger falls in industrial employment.

Table A6.3. Experian Forecasts of Employment Change in Merton 2008-2026

	No. of Jobs		Change
	2008	2021	2008-21
Manufacturing (B1c/B2)*	9,809	8,217	- 1,592
Distribution (B8)**	5,693	5,779	+ 86
Offices (B1a/b)***	21,075	23,975	+ 2,892
<b>Total B-class Jobs</b>	<b>36,577</b>	<b>37,971</b>	<b>+ 1,386</b>
<b>Jobs in All Sectors</b>	<b>82,057</b>	<b>84,310</b>	<b>+ 2,253</b>

Source: Experian Business Strategies/NLP, 2010 – total jobs including self-employed

\* includes vehicle repair and some construction activities that use B class land

\*\* includes parts of transport & communications sectors that use industrial land

\*\*\* includes publishing and a proportion of government offices

This predicted net increase from the Experian based forecasts of 1,386 B Class jobs over a 13 year period, equivalent to 106 jobs per year, is quite different from recent patterns of employment change in Merton. Between 1998 and 2008, B class employment in Merton fell by approximately 2,900 jobs, or 290 per annum, as falling manufacturing employment outweighed job growth in the business services sector. In contrast, the GLA forecasts imply a net loss of 98 B class jobs a year over the period, closer to past trends. On this basis, the GLA employment forecasts could be regarded as a relatively low growth estimate.

## Translate Employment Forecasts to Floorspace

These job forecasts for Merton can then be converted to future employment space requirements assuming typical ratios of jobs to floorspace for the different B uses. To estimate space needs, a ratio of 1 job per 31 m<sup>2</sup> gross is assumed for manufacturing space. For distribution, 1 job per 40 m<sup>2</sup> is assumed for general, smaller scale warehousing, with large scale, lower density strategic units assumed to be unlikely in Merton. Business and financial services jobs are taken to be the main requirements for B1 office space, at a general office ratio of 1 job per 20 m<sup>2</sup>.

In addition, where job change is forecast to be negative, as occurs in the manufacturing sector, the floorspace loss associated with this is reduced by half. This is to reflect the fact that, in many cases, a firm can decrease its number of employees while continuing to operate in exactly the same industrial building. Thus, there can be a significant decrease in industrial jobs without a commensurate decrease in industrial floorspace. Lastly, 10% is added to all positive floorspace requirements to reflect a normal level of vacancy in this new employment space.

On this basis, the job forecasts indicate less industrial floorspace being needed overall by 2021, with large losses of manufacturing space only partly offset by a modest amount of new warehousing space. However, a significant increase in office space is predicted (Table A6.4).

There are significant differences between the GLA and Experian based estimates due to the different methodologies and factors used. Office requirements range between a need for between 47,850 and 63,800 m<sup>2</sup> more space. For industrial space, the range is between 21,000 and 53,500 m<sup>2</sup> less space being needed. The overall requirement for B class space would therefore be either 42,900 m<sup>2</sup> more or 5,600 m<sup>2</sup> less floorspace, depending on the forecasts used. In the most optimistic case, therefore, an employment forecast based approach could imply a future need for significantly more employment space in Merton than now, with most of the new space being for office uses.

Table A6.4 Job Forecast based Employment Space Requirements, 2010 - 2026

	Net Floorspace Needs 2010-21 (m <sup>2</sup> )	
	Experian Forecasts	GLA Forecasts
Manufacturing (B1c/B2)	- 24,700	- 53,475
Distribution (B8)	+ 3,800	
Offices (B1a/b)	+ 63,800	+ 47,850
<b>Total B-class Space/land</b>	<b>+ 42,900</b>	<b>-5,600</b>

Source: NLP Analysis

Note: Totals rounded to the nearest 100 m<sup>2</sup>

These estimated future employment space requirements differ from past trends in the stock of floorspace in the Borough. Based on Valuation Office Agency data for the period 1998-2008, Merton lost some 42,000 m<sup>2</sup> of B class floorspace, as gains in warehousing space (+27,000 m<sup>2</sup>) and office space (+2,000 m<sup>2</sup>) were offset by a large fall in factory space (-71,000 m<sup>2</sup>). Thus, the Experian employment forecasts anticipate much stronger growth of office space and a slowing of industrial losses in future, while the GLA estimates also anticipate stronger office growth than in the past. Given these differences, a cautious approach needs to be taken towards basing future land needs only on job forecasts and other approaches need to be considered.

### Past Completion Rates

Because they reflect market demand and actual development patterns on the ground, in some situations long term completion rates of employment floorspace can provide a good basis for informing future land needs, particularly where land supply or demand has not been unduly constrained historically. However, in a fairly densely developed and predominantly residential London Borough such as Merton, it could be argued that demand for employment space has been constrained by limited available development sites in the past.

Table A6.5 Net Annual Completion Rates in Merton

	Offices (B1a/b)	Manufacturing (B1c/B2)	Warehousing (B8)	All B Uses
<b>VOA data (98-08) (m<sup>2</sup>)</b>	+200	-7,900	+3,000	-4,700
<b>Merton AMR (07-09) (m<sup>2</sup>)</b>	+1,500	-11,900	- 1,200	-11,600

Source: VOA/L B Merton AMRs & NLP Analysis

Both Valuation Office Agency (VOA) data on commercial floorspace change and Council monitoring data were examined to provide a picture of past net development rates (completions) in the Borough in recent years (Table A6.5). As the Council data only covers two years, the VOA figures are considered to provide a more robust indication of past trends.

One picture of future growth in Merton could simply assume that future development rates carry on at the longer term average achieved in the past. If it were to be assumed that the past VOA development rates noted above continued in the period 2010-2021, this would equate to net gains of only 2,200 m<sup>2</sup> of office space and net losses of 53,900 m<sup>2</sup> of industrial space. In total, this would indicate a need for approximately 52,000 m<sup>2</sup> less employment space in Merton by 2021, a figure substantially different from the estimates obtained using job forecasts.

Past development rates may not, however, be a good guide to future demand here. An approach based on past trends does not necessarily reflect the impacts of the recent recession or longer term trends that could, for example, reduce future amounts of demand for office space. It may also underestimate demand if past completion rates were constrained by, for example, a lack of suitable development sites. It also seems unlikely that past high losses of industrial space can continue at that pace, if only because the supply of sites will have reduced. Therefore, if this approach were to be used as the preferred forecasting method, adjustments to past completion rates would probably be needed to reflect such factors.

### Labour Supply Based Requirements

Although the London labour market involves complex travel to work flows between boroughs, it is also useful to consider how many jobs, and hence employment space, would be needed to broadly match forecast growth of the Borough's resident workforce. Any significant increase of employment space beyond that amount could potentially increase commuting into Merton, creating further pressures on transport systems.

Based on ONS 2006-based population forecasts (the most recent available), the predicted increase in the Borough's resident labour force based largely on demographic change would produce approximately 10,300 more economically active, working age residents. Of these, some 45% or 4,640 workers would

typically seek B class jobs.<sup>2</sup> If the same proportion as now were to out-commute to jobs elsewhere, this would leave only about 2,780 more resident workers available to fill new B class jobs in the Borough by 2021.<sup>3</sup>

Significant increase in new housing provision in the Borough would also contribute to increased labour supply, even if some new dwellings are filled by existing residents. The London Plan target for Merton of some 370 dwellings annually implies up to 5,500 more, economically active, working age residents by 2021. Of these, some 45% or 2,470 workers would typically seek B class jobs.<sup>4</sup> To avoid double counting, it is assumed any increase in labour supply from new housing is included within the larger increase arising from demographic change above.

Assuming that future out-commuting from the Borough will not fall less by more than a fifth from its current level of 40%, local labour supply could be between 3,150 - 4,640 workers seeking B class employment. If, as an illustration, about 65% of these were seeking office jobs, the rest industrial jobs, providing just enough office jobs for this projected increase in resident workers would require somewhere between 41,000 and 60,300 m<sup>2</sup> of new office space. This labour based estimate provides a useful benchmark for comparison with other approaches.

The different approaches used clearly result in quite different estimates of future employment space requirements. To help judge the most realistic path among these different estimates, it is useful to consider other economic factors that could influence demand and supply of employment workspace in the years to 2021.

### **Other Factors**

Given the rather different pictures of future demand indicated by the employment-based estimates and past-take-up trends, a range of other indicators have also been reviewed to inform a judgement on where the best estimate of future needs should lie. Some of these factors pull in different directions and a balance has to be drawn between them.

Trends in the national economy will clearly be a significant factor affecting future demand for employment space. At this time, the UK is recovering from a major economic recession and financial credit shortage. Current forecasts predict recovery to be slow with growth rates over the next 10 years to be much lower than in the past. In particular, sectors reliant on Government spending are likely to see some reductions in employment as a result of future budget cuts. While this study estimates employment space requirements over an 11 year period, over which short term fluctuations should even out, past development rates in Merton do not necessarily reflect this degree of slowdown

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<sup>2</sup> Based on split of B and Non B class jobs in 2008 from Experian employment forecasts for Merton

<sup>3</sup> Assuming that household size of 2.35 and working-age population will be 70% of all residents (based on Census 2001 and ONS mid-year population estimates)

<sup>4</sup> Based on split of B and Non B class jobs in 2008 from Experian employment forecasts for Merton

and probably need to be adjusted to reflect a less benign economic outlook than in the past.

Levels of new business registrations provide an indication of the number of new firms starting-up or expanding in the Borough, and this will influence the amount and type of employment space required in future. Formation rates of new businesses in Merton have been higher than the London average. This would suggest that some continuing growth in demand for additional employment space as new firms start up, although the amount required from this source appears likely to be small in scale. The presence of many small, multiple occupancy developments and well occupied small business centres in the Borough suggest that there is good local demand which should adequately be provided for if Merton wants to achieve its economic potential.

The need to replace land or premises lost (or released) to other uses to maintain the level of the current stock of employment space has been considered. In the last few years, there have been high losses of employment space to other uses, mostly industrial space going to religious facilities, residential, health or education uses. It is not clear whether this is representative of longer term trends but it does indicate that some replacement of any space lost to other uses could be needed if the current level of stock is to be maintained and firms are not forced out by lack of suitable space.

Vacancy levels and floorspace availability provide another indicator of the balance between current supply and demand for employment space. A typical vacancy rate in a normal market would be around 8-10%, to allow for movement and expansion of firms, and a choice of locations. Vacancy rates for offices in Merton currently stand well above normal rates, but industrial vacancy is quite low. This indicator might suggest a need to over-provide industrial space in future to ensure a better functioning market although the continuing losses of industrial space weigh against doing this; the need may be for better quality space than more quantity.

Other factors which could moderate future levels of employment space needed include the growing trend to relocate certain business operations to lower-cost locations overseas, often referred to as "off-shoring". The industries with the highest propensity for this have typically included communications, banking and finance, and some business services, in which Merton has modest representation. While most impacts of this factor may already have occurred, they are still happening to some extent. At the same time, industrial firms are tending to move manufacturing operations to lower cost countries while maintaining UK distribution functions. Over time, these trends could reduce employment space needs in Merton although the likely scale is unclear.

The amount of additional employment space needed in the future could also be reduced by "smart or spaceless growth" - the ability to achieve economic growth without corresponding increases in demand for employment space or labour. This could reflect increased automation, labour productivity improvements, hot-desking, working from home, or more overtime working by current staff. Again, it is difficult to quantify the extent of this effect and recent

studies have not found major changes in overall job/space ratios so far, although space reductions of around 30% have been achieved in individual firms using such approaches. The other aspect of this would be to reduce employment land (but not space) requirements through more efficient use of existing sites, including denser office development. This appears particularly important in a Borough with limited development land. Such factors suggest a level of employment space somewhat less than the highest estimate of demand should be planned for.

It is also important to explore whether Merton's key sectors could grow to an extent that would lead to growth levels above past trends, or any other developments or major infrastructure proposals in the wider area could greatly stimulate growth in Merton. The Council's economic strategy identifies creative industries, environmental technologies and business & professional services sectors as its target growth sectors. Merton certainly has fairly high concentration in the creative sector already. Provision of suitable premises and active promotion of Merton as a focus of it within London could support growth although other London locations are also strong in this sector and will compete. In terms of green industries, there is also a reasonable base of existing uses in this sector, although other London areas are also targeting this sector and have more, suitable land available. Business services have shown recent growth and market views suggest Wimbledon has scope to attract more, provided suitable development sites can be identified. At the same time, it is not obvious that any infrastructure changes in London generally, such as Crossrail or the Olympics development, would particularly benefit Merton's economy. Overall, there appears scope for modest growth rather than any step change in employment levels as a result of such factors.

Competition to economic growth in Merton from other centres nearby could also constrain future demand and hence the scale of employment land provision needed. As noted earlier, most adjoining London Boroughs do not have large amounts of developable employment land and there are no major industrial developments planned there. There are some large office schemes, as well as much refurbished office space, planned in Croydon and Wandsworth, although it is not clear that these will compete directly with Merton, and perhaps serve a different market. They could, however, limit Wimbledon's prospects of attracting larger office occupiers and reduce the prospects of relocations from central London. This factor may, at best, moderate future office demand in Merton.

On balance, there are a number of factors which would support continuing demand for employment space in the Borough, particularly if the Wimbledon "brand" can be capitalised on to attract relocations from higher cost areas of London. However, the scale of future space needs is likely to be tempered by slow recovery from national economic recession, possible competition from office development in nearby areas and pressures for more intensive use of existing land and employment space over the longer term. Future development rates and employment space needs in the Borough therefore appear unlikely to be significantly higher than in the past.

## Planning Requirement for Employment Land

To identify the amount of employment space that should actually be allocated, it is normal to convert net floorspace requirements to an estimate of gross needs by adding an allowance for replacement of future losses of employment space to other uses. Without doing this, the stock of employment space would gradually be eroded. This approach is also advocated in the recent guidance on Employment & Economic Land Assessments in the South East.<sup>5</sup>

Recorded losses of employment space in Merton in recent years have been high, over 20,000 m<sup>2</sup> p. a., but available data covers a very short period and may not accurately reflect future trends. Much of these losses were of older industrial units but were some were part of redevelopment to provide modern employment premises. Some losses of obsolete space need to be accepted as part of the restructuring of a local economy and not all need to be replaced. The amount of losses could also be expected to reduce greatly over time in Merton as the supply of older premises reduces. At the same time, it would be desirable to replace some employment space to ensure that firms are not forced out of the area. On balance, it appears appropriate to allow for a fairly modest replacement allowance amounting to 500 m<sup>2</sup> p.a. for office space and perhaps 1,000 m<sup>2</sup> p.a. for industrial space over the next 11 years. This would equate to 16,500 m<sup>2</sup> in total over the period.

It has also been common to provide some additional safety margin on top of the initial estimate of needs. This can reflect the need to provide some choice of sites to developers, with an extra allowance to compensate for the uncertainties of the forecasting process, and to give some flexibility and decanting space while older premises are redeveloped and new premises are coming forward. Many studies in the past have added a margin of up to 50% of the initial estimate to allow for such factors.

However, recent guidance suggests that an appropriate margin for each use class should be based purely on how long it takes a site to move from being a commitment to completion, although it gives no guidance on what these timescales typically are or how the floorspace allowance to reflect this margin should be estimated.<sup>6</sup> Typically, however, an amount equivalent to 1-2 years of past completions rates has been used, depending on local market conditions. The need for this margin could be reduced if a rolling 5 year employment land supply was genuinely available.

A reasonable but not over-generous additional allowance should be made here to offer some flexibility but avoid over-provision of scarce land. Within the relatively strong demand and fast development context of London, one year's worth of past gross completions appears an appropriate amount in order to ensure that there is enough space available for expanding/relocating firms whilst new premises are constructed. This would equate to 12,500 m<sup>2</sup> in

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<sup>5</sup> The South East England Partnership guidance is unclear as to whether this allowance should be applied to job forecast based estimates but taking a cautious approach, this allowance has been added to all demand estimates in this study.

<sup>6</sup> Guidance on Employment & Economic Land Assessments, South East Partnership Board, March 2010

Merton, which would add around 30% to the Experian job based demand estimate, but much higher relative increases to the other estimates.<sup>7</sup>

Taking account of these additional allowances, the resulting gross employment space requirements over the next 11 years to 2021 including this safety margin are summarised in Table A6.6 below. The inclusion of the safety margin and allowance for replacement of losses raises the maximum employment space requirement to be planned for to almost 72,000 m<sup>2</sup>, with a minimum of -24,700 m<sup>2</sup>. The office space requirement shows a sizeable variation - 12,200 to 75,800 m<sup>2</sup>. The estimated range for industrial space is tighter, varying between a need for 3,900 m<sup>2</sup> less space and 36,900 m<sup>2</sup> less. These differences reflect the different methods and assumptions used, with the two job growth based estimates indicating the highest office space requirements, and highest B class space requirements overall.

Table A6.6 Gross Employment Space Requirements to 2021 (including safety margin & allowance for losses)

	Experian Baseline Job Estimate (m <sup>2</sup> )	GLA Job Forecasts (m <sup>2</sup> )	Past Completions Continue (m <sup>2</sup> )	Reduced Industrial Losses/Higher Offices (m <sup>2</sup> )
<b>Industrial space (B1c/B2/B8)</b>	<b>-3,900</b>	<b>-36,500</b>	<b>-36,900</b>	<b>- 15,200</b>
<b>Office space (B1a)</b>	<b>+75,800</b>	<b>+59,900</b>	<b>+12,200</b>	<b>+32,000</b>
Total B-class space	+71,900	+23,400	-24,700	+16,800

## Land Requirements

Table A6.7 below indicates the broad amounts of development land associated with these gross floorspace requirements. These land estimates assume that a high proportion of office space (80%) would be built in town centres at a fairly dense plot ratio of 2.0.<sup>8</sup> The remaining 20% is assumed to be developed on edge-of-centre, or other urban sites at medium densities with a plot ratio of 0.8.<sup>9</sup> These ratios have been applied to the office space requirements to estimate likely land needs.

For industrial developments, a typical 0.4 plot ratio has been assumed in line with current guidance. In the maximum case, based on Experian job forecasts, up to 2.2 ha of development land would be needed, and only for office development. However, under all other estimates, there would be a need for less land than now, the amount varying between 1.8 and 8.1 ha less. This assumes that some industrial land can be redeveloped for office uses, and if not, the overall land requirement would be higher.

<sup>7</sup> This comprises 6,000 m<sup>2</sup> for industrial space and 6,500 m<sup>2</sup> for offices

<sup>8</sup> i.e. 20,000 m<sup>2</sup> of development could be developed on a 1 ha (10,000 m<sup>2</sup>) site; the assumption of 80% of new office space being in town centres is an assumption based on PPS4 and current development patterns in Merton

<sup>9</sup> A 0.8 plot ratio for offices exceeds figures in ODPM Guidance but reflects some recent development in outer London.



Table A6.7 Employment Land Requirements 2010- 21

	Experian Baseline Job Estimate (m <sup>2</sup> )	GLA Job Forecasts (m <sup>2</sup> )	Past Completions Continue (m <sup>2</sup> )	Reduced Industrial Losses/Higher Offices (m <sup>2</sup> )
Industrial land (B1c/B2/B8)	- 2.5	-10.6	-9.2	- 3.8
Office land (B1a)	+4.6	+3.6	+1.1	+2.4
<b>Total B-class land</b>	<b>+2.1</b>	<b>- 7.0</b>	<b>- 8.1</b>	<b>-1.4</b>

Note: Figures rounded to nearest 0.1 ha and column totals may not sum exactly



## Experian Employment Forecasts of B Class Sectors

Total Employment ('000s)	London Borough of Merton			
	2008	2010	2021	Change 2008-21
Agriculture, Forestry & Fishing	94	93	92	-2
Oil & Gas Extraction	9	11	7	-2
Other Mining	28	8	2	-26
Food, Drink & Tobacco	700	712	602	-98
Textiles & Clothing	225	289	460	235
Wood & Wood Products	67	51	22	-45
Paper, Printing & Publishing	1320	1247	790	-530
Fuel Refining	244	25	16	-228
Chemicals	487	450	341	-146
Rubber & Plastics	422	295	204	-218
Minerals	150	139	113	-37
Metals	840	714	380	-460
Machinery & Equipment	173	74	49	-124
Electrical & Optical Equipment	914	834	719	-195
Transport Equipment	109	111	68	-41
Other 'Other' Manufacturing	131	53	74	-57
Gas, Electricity & Water	17	5	3	-14
Construction	9409	9337	10245	836
Wholesaling	5321	5231	5560	239
Retailing	8426	8933	10355	1929
Hotels & Catering	3789	4021	4913	1124
Transport	3779	3911	4348	569
Communications	1079	1061	966	-113
Banking & Insurance	1830	1797	2070	240
Business Services	15004	14152	16195	1191
Other Financial & Business	3900	4238	5411	1511
Public Admin. & Defence	3009	2937	2752	-257
Education	5992	6435	6091	99
Health	6315	6912	7189	874
Other 'Other' Services	8274	6794	4273	-4,001
<b>Total</b>	<b>82,057</b>	<b>80,870</b>	<b>84,310</b>	<b>2,253</b>

Sub-totals of B class sectors	2008	2010	2021	2008-21
Manufacturing	9,809		8,217	-1,592
Distribution/storage	5,693		5,779	86
Office based activities	21,075		23,975	2,900

Note: Figures relate to total employment (Employees and self-employed) and are actual numbers of jobs rather than Full Time Equivalents

## Appendix 8      B and Non B Uses by Sector

Experian Sector	Uses	Office, Industrial or Non-B?	Considered in Report?
Agriculture, Forestry & Fishing	Agriculture, Forestry & Fishing	Non-B	No
Oil & Gas Extraction	Oil & Gas Extraction	Non-B	No
Other Mining	Iron, uranium, other metal ores	Non-B	No
Food, Drink & Tobacco	Food, Drink & Tobacco	Industrial	Yes
Textiles & Clothing	Luggage, footwear, clothes, other textiles	Industrial	Yes
Wood & Wood Products	Wood & Wood Products	Industrial	Yes
Paper, Printing & Publishing	Paper, Printing & Publishing	Industrial & Office	Yes
Fuel Refining	Fuel Refining	Industrial	Yes
Chemicals	Pharmaceuticals, pesticides, paint etc	Industrial	Yes
Rubber & Plastics	Rubber & Plastics	Industrial	Yes
Minerals	Glass, ceramics, stone, concrete	Industrial	Yes
Metals	Metals	Industrial	Yes
Machinery & Equipment	Machinery & Equipment	Industrial	Yes
Electrical & Optical Equipment	Electrical & Optical Equipment	Industrial	Yes
Transport Equipment	Transport Equipment	Industrial	Yes
Other Manufacturing	Furniture, Recycling	Industrial & Non-B	Yes
Gas, Electricity & Water	Power stations, network maintenance, reservoirs	Non-B	No
Construction	Construction of buildings	Industrial & Non-B	Yes
Wholesaling	Vehicle sales & maintenance, petrol filling stations, trade counters	Industrial & Non-B	Yes
Retailing	Shops and auxiliary functions	Non-B	Yes
Hotels & Catering	Hotels, restaurants, bars, nightclubs	Non-B	Yes
Transport	Cargo handling, taxis, bus & trains, haulage, travel agencies	Industrial & Non-B	Yes
Communications	Post, Couriers & Telecommunications	Office & Industrial	Yes
Banking & Insurance	Banks, Insurers and auxiliary functions	Office	Yes
Business Services	Legal, accounting, consultancy, advertising, industrial cleaning	Office	Yes
Other F&Bs	Real estate, hire of vehicles & machinery, research & development	Office	Yes
Public Admin. & Defence	Local & County Councils, Civil Service, Quangos, NGOs, military installations	Office & Non-B	Yes
Education	Schools, universities, nurseries, language schools	Non-B	Yes
Health	Hospitals, GPs surgeries, care homes, vets, dentists,	Non-B	Yes
Other Services	Cinemas, churches, refuse disposal, theme parks, sports facilities, libraries, museums, theatres	Non-B	Yes

## **Index 9 Current Provision of Non B Uses in Merton**



## Non B Uses in Merton

Category	Post Code	Name	Address
Leisure Centre	CR4 4HD	Canons Leisure Centre	Madeira Rd, Mitcham, Surrey CR4 4HD
Leisure Centre	SM4 5HE	Morden Park Pool	London Rd, Morden, Surrey
Leisure Centre	KT3 4PH	Goals Soccer Centre	Beverley Leisure Park, Beverley Way, New Malden, Surrey
Health Club	SW19 1AQ	Virgin Active Health Clubs	North Rd, Wimbledon, London,
Health Club	SW20 8DE	David Lloyd Leisure Ltd	Bushey Rd, Raynes Park, London,
Health Club	SW17 0BL	Christopher's Squash & Fitness Club Ltd	Wimbledon Stadium, Plough Lane, Wimbledon, London,
Health Club	SW19 5DX	Functional Intelligent Training	1 The Basement, High St Wimbledon, London,
Health Club	SW19 4TT	The King's Sports Club	Southside Common, London,
Health Club	SW19 1EW	Wimbledon Leisure Centre	Latimer Rd, London,
Health Club	SW19 1RY	YMCA	200, The Broadway, Wimbledon, London,
Health Club	SW19 4HD	Wimbledon Raquets & Fitness Club	Cranbrook Rd, Wimbledon, London,
Health Club	SW19 4JS	Esporta Health & Fitness (Wimbledon)	21-33, Worple Road,
Health Club	SW19 2RD	Virgin Active Club (Merton Abbey)	Abby Mills, Watermill Way, London-SW19 2RD
Health Club	SW19 1QB	Nuffield Health Fitness & Wellbeing (Wimbledon)	The Broadway, London-SW19 1QB
Health Club	SW20 8DN	Results Health and Fitness	Kingston Road, London
Health Club	SM4 6BF	The Hub at Tooting And Mitcham	Imperial Fields, Bishopsford Road, Morden
Health Club	CR4 2PE	Fitspace (Mitcham)	1-3, Upper Green East, Mitcham-
Health Club	SW19 5AE	All England Lawn Tennis and Croquet Club	Church Road,
Health Club	SW19 7HX	Wimbledon Park Athletics Track & Gym	Wimbledon Park, London-
Horse Riding	SW19 4SU	Ridgway Stables	Address: Ridgway Stables, 93 Ridgway, Wimbledon Village

Category	Post Code	Name	Address
Horse Riding	SW19 5DX	Horse Riding in London at Wimbledon Village Stables	24A High Street,
Golf Club	SW19 4UW	Royal Wimbledon Golf Club	Camp Road, Wimbledon,
Golf Club	SW19 7HR	Wimbledon Park Golf Club	Home Park Road, Wimbledon
Golf Club	KT3 4PH	World Of Golf (New Malden)	Beverley Way, New Malden-
Golf Club	CR4 4HN	Mitcham Golf Club	Carshalton Road, Mitcham Junction, Mitcham-
Greyhound Stadium	SW17 0BL	Wimbledon Greyhound Stadium	Plough Lane, Wimbledon,
Cinema	SW19 1QB	Odeon Cinema	39, The Broadway, The Crescent, Wimbledon
Cinema		HMV Cinema	Wimbledon,
Nightclub	SW19 1SD	The Watershed	267 The Broadway, Wimbledon
Nightclub	SW19 1RH	Po Na Na Souk Bar	82 The Broadway, Wimbledon
Nightclub	SW19 1QG	Bar Sia	105 The Broadway, Wimbledon
Bowling Alley	SW20 8DE	David Lloyd Lanes	Bushey Rd, London
Theatre	SW19 2RD	Colour House Theatre	Merton Abbey Mills, Watermill Way, London,
Theatre	SW19 1QG	New Wimbledon Theatre	The Broadway, London,
Theatre	SW19 1SB	Polka Theatre for Children	240, The Broadway, Wimbledon, London,
Theatre	SW19 4TT	Collyer Hall Theatre	Southside Common, London,
Town Centre	SW19 7NH	Wimbledon	
Town Centre	SM4 5DA	Morden	
Town Centre	CR4 3NH	Mitcham	
Retail Park	SW19 3XD	Morden Road	2 Jubilee Way London
Retail Park	SW19 2PP	Colliers Wood - Prioity Retial Park	Priory Retail Park, 131 High Street Collier's Wood, Merton, London
Retail Park	SW19 2TY	Colliers Wood - Tandem centre	The Tandem Centre, Tandem Way, London
Retail Park	SW17 0BW	Plough Lane	Plough Lane London
Retail Park	SW20 0JQ	Raynes Park - Bushey Road	Bushey Road, London
Retail Park	KT3 4RP	Shannon Corner Retail Park	Burlington Rd, New Malden, Greater London
Local Centre	SW20 0LA	Raynes Park	



Category	Post Code	Name	Address
Urban Centre	SW19 2BN	Colliers Wood	
Local Centre	KT3 6NB	Motspur	
Local Centre	SW19 5AP	Wimbledon Village	
Local Centre	SW19 8AA	Arthur Road	
Local Centre	SW17 9LG	North Mitcham	
Local Centre	SW19 1DE	South Wimbledon	
Petrol Station	SW20 8LR	BP Express Shopping Ltd	314, Kingston Rd, London,
Petrol Station	SW19 2BN	Tesco Filling Station	164-168, High St, Colliers Wood, London,
Petrol Station	SW19 2QD	Total Convenience Stores	231, Western Rd, London,
Petrol Station	SW19 1DD	Sainsbury's Petrol Station	1, Merton High St, London,
Petrol Station	SW16 5JF	Total Convenience Stores	7, Rowan Rd, Streatham, London,
Petrol Station	SW20 8RE	Shell Pepys Corner	Worple Rd, London,
Hotel	SW19 4UE	Cannizaro House	West Side, London, SW19 4UE
Hotel	SW19 5BA	Rose and Crown	55, High St, Wimbledon, London, SW19 5BA
Hotel	SW19 2BH	Express By Holiday Inn	EXHI London-Wimbledon, 200, High Street Colliers Wood, London, SW19 2BH
Hotel	SW19 1SD	Antoinette Hotel Wimbledon	249-263, The Broadway, Wimbledon, London,
Hotel	SW20 9LS	Thalia Holiday Homes	150, Westway, Wimbledon, London,
Hotel	SW19 4HZ	Wimbledon Hotel	78, Worple Rd, London,
Hotel	SW19 2RF	Premier Inn London Wimbledon South	27, Chapter Way, London,
Hotel	SW19 3QW	The Goodenough Guest House	4, Goodenough Rd, Wimbledon, London,
Hotel	SW19 7AE	Worcester House Hotel	38, Alwyne Rd, Wimbledon, London,
Hotel	SM4 5PH	Travelodge Hotels Ltd	A24 Epsom Rd, Morden, Surrey SM4 5PH
Hotel	SW19 4JZ	Justin James Hotel	43, Worple Rd, Wimbledon, London,
Hotel	SW19 2RD	Premier Inn	Merton Abbey Mills, Watermill Way, Merantum Way, London
Hotel	SW19 1ED	The Phoenix Hotel	123-125, Merton Rd, London,

Category	Post Code	Name	Address
Hotel	SW19 7AE	Worcester House Hotel	38, Alwyne Rd, Wimbledon, London,
Hotel	SW19 7BA	Marple Cottage	113, Woodside, Wimbledon, London,
Garden centre	SM4 5JD	Morden Hall Garden Centre	21 Morden Hall Road, Morden
Garden centre	SM4 4SY	Lower Morden Garden Centre	Lower Morden Lane, Morden
Garden centre	SW20 0TW	The Garden Sage	48 Durham Road
Place of Worship	SM4 5PT	Ahmadiyya Muslim Association UK	181, London Rd, Morden, Surrey
Place of Worship	CR4 3DQ	All Nations Revival Church	49, Oakwood Avenue, Mitcham, Surrey
Place of Worship	SW19 1BU	All Saints C of E Church	All Saints Rd, South Wimbledon, London,
Place of Worship	CR4 1NJ	Ascension C of E Church	Sherwood Park Rd, Mitcham, Surrey
Place of Worship	SW19 1QJ	Bethel Baptist Church	129, The Broadway, London,
Place of Worship	SW20 8SA	Chirst Church Balham C of E Church	577, Kingston Rd, London,
Place of Worship	SW19 8AJ	Christ the King Catholic Church	9, Crescent Gardens, London,
Place of Worship	SW19 4LB	Christian Science Society	59, Worple Rd, London,
Place of Worship	SW20 8SA	Dundonald C of E Church	577 Kingston Road, London, SW20 8SA
Place of Worship	SW19 3QH	Dundonald Congregational Church	Fairlawn Rd, Wimbledon, London,
Place of Worship	CR4 4ND	Eagles Assembly	7, Bunting Close, Mitcham, Surrey
Place of Worship	SW19 4QL	Emmanuel Church	24, Ridgeway, London
Place of Worship	SM4 4RJ	Emmanuel Church (C of E)	Dudley Drive, Morden, Surrey
Place of Worship	CR4 2DG	Etherean Mission (UK)	58, Gorringe Park Avenue, Mitcham, Surrey
Place of Worship	CR4 3DE	Gloryland Pentecostal Ministries	84, Lewis Rd, Mitcham, Surrey
Place of Worship	CR4 2LF	Holy Ghost Deliverance Ministries	61, St. Marks Rd, Mitcham, Surrey
Place of Worship	SW19 8LA	Kingdom Hall of Jehovah's Witnesses	corner of, Haydons Rd, Plow Lane, London,
Place of Worship	SW20 9JZ	Martin Way Methodist Church	Buckleigh Avenue, Merton Park, London,

Category	Post Code	Name	Address
Place of Worship	CR4 2JD	Mitcham Baptist Church	London Rd, Mitcham, Surrey CR4 2JD
Place of Worship	CR4 4LB	Mitcham Methodist Church	Cricket Green, Mitcham, Surrey
Place of Worship	CR4 3BN	Mitcham Parish Church	The Parish Centre, Church Path, Mitcham, Surrey
Place of Worship	SM4 5BL	Morden Baptist Church	Crown Lane, Morden, Surrey
Place of Worship	SM4 4SP	Morden Park Baptist Church	Lower Morden Lane, Morden, Surrey
Place of Worship	KT3 6JR	New Malden Evangelical Free Church	27, Seaforth Avenue, New Malden, Surrey
Place of Worship	CR4 1LT	New Testament Assembly	South Lodge Avenue, Mitcham, Surrey
Place of Worship	SW17 9ER	Our Lady of the Assumption R.C. Church	282, Links Rd, Tooting, London,
Place of Worship	CR4 1NF	Pistis International Church	174, Sherwood Park Rd, Mitcham, Surrey
Place of Worship	CR4 1BN	Pollards Hill Baptist Church	Wide Way, Mitcham, Surrey
Place of Worship	SW19 4EL	Quakers Religious Society of Friends	40, Spencer Hill Rd, Wimbledon, London,
Place of Worship	SW19 8LR	Queen's Road Church	30, Queens Rd, Wimbledon, London,
Place of Worship	SW20 8QY	Raynes Park Methodist Church	195-205, Worpole Rd, London,
Place of Worship	SW19 8TB	Redeemed Christian Church of God	169-171, Haydons Rd, London,
Place of Worship	CR4 3LJ	Rhema Church Ministries	1st floor, 45, Crusoe Rd, Mitcham, Surrey
Place of Worship	SW19 4LU	Sacred Heart Church	Edge Hill, London,
Place of Worship	SW20 8DN	Shofar Christian Church Ltd	594, Kingston Rd, London,
Place of Worship	SW19 8PU	Shree Ghanapathy Temple	123-133, Effra Rd, Wimbledon, London,
Place of Worship	CR4 2DD	St. Barnabas Church	Gorringe Park Avenue, Mitcham, Surrey
Place of Worship	SW20 9DB	St. John Fisher Church	207, Cannon Hill Lane, London,
Place of Worship	SW19 2HS	St. Joseph	30, Park Rd, Colliers Wood, London,
Place of Worship	SW19 8BZ	St. Lukes Church	Ryfold Rd, Wimbledon Park
Place of Worship	SW19 7ND	St. Mark's Church	St. Marks Place, Wimbledon, London,

Category	Post Code	Name	Address
Place of Worship	CR4 2LF	St. Mark's Church	St. Marks Rd, Mitcham, Surrey
Place of Worship	SW19 7BP	St. Mary's Church	St. Mary's Rd, London,
Place of Worship	CR4 1LS	St. Michael's Catholic Church	9, Fern Avenue, Mitcham, Surrey
Place of Worship	SW20 9DG	St. Saviours C of E Church	Grand Drive, Wimbledon, London,
Place of Worship	SW19 1EP	St. Winifreds Catholic Church	2, Latimer Rd, London,
Place of Worship	SW19 3SH	St. Andrews Church	Herbert Road, Wimbledon
Place of Worship	SW16 5SY	Streatham Vale Baptist Church	Leonard Rd, London,
Place of Worship	SW19 5HJ	The Buddhapadip Temple	14, Calonne Rd, London,
Place of Worship	CR4 3AU	The Elim Pentcostal Church	Love Lane, Mitcham, Surrey
Place of Worship	SW19 8TB	The Redeemed Christian Church of God	Living Water Parish, 163-171, Haydons Rd, London,
Place of Worship	SW19 8LD	The United Apostolic Church	Kohat Rd, Wimbledon, London,
Place of Worship	CR4 1LT	The Way Christian Fellowship	Pollards Hill Community Centre, South Lodge Avenue, Mitcham
Place of Worship	SW19 4AA	Trinity United Reformed Church	Mansel Rd, Wimbledon, London,
Place of Worship	SW19 8DS	Wimbledon Mosque	264, Durnsford Rd, London,
Place of Worship	SW19 3TG	Wimbledon Spiritualist Church	134-136, Hartfield Rd, London
Place of Worship	SW19 4JZ	Worple Rd Church	37, Worple Rd, London,
Private Care Home	CR4 4AA	Cumberland Care Home	67, Whitford Gardens, Mitcham, Surrey
Private Care Home	CR4 4SJ	Fieldway Nursing and Residential Centre	40, Tramway Path, Mitcham, Surrey
Private Care Home	SW19 8LR	Queens Court Care Home	32/34 Queens Road, Wimbledon, London,
Private Care Home	SW19 5NJ	Heathland Court Care Centre	56, Parkside, London,
Private Care Home	SW19 8RY	Southpark Residential Home Ltd	193, South Park Rd, London,
Private Care Home	SW20 8TG	Rosemary Lodge Nursing Home	9, The Drive, London,
Private Care Home	SM4 5QT	Manor House Care Home	Manor House, London Rd, Morden, Surrey

Category	Post Code	Name	Address
Private Care Home	SM4 4JN	Kelstone Court	153, Camborne Rd, Morden, Surrey
Private Care Home	SW19 4QF	Acer Healthcare	31, Homefield Rd, London,
Private Care Home	SW20 8AN	St. Teresa's	12, Lansdowne Rd, Wimbledon, London,
Private Care Home	SW19 3TJ	Care Management Group Ltd	The Pointe, 89, Hartfield Rd, London,
Private Care Home	CR4 4AB	Care UK	Cumberland, 67, Whitford Gardens, Mitcham, Surrey
Private Care Home	CR4 4EH	Barons Lodge Psychiatric Nursing Home	24, Baron Grove, Mitcham, Surrey
Private Care Home	SW20 8AG	Wimbledon Beaumont Care Home	35 Arterberry Road, Wimbledon, London,
Private Care Home	CR4 1BP	Rosedale Rest Home	1, Wide Way, Mitcham, Surrey
Private Care Home	SW20 9EG	The Elms Rest Home	142, Elm Walk, London,
Private Care Home	SW19 8JQ	Haydon Park Lodge	7-9, Haydon Park Rd, London,
Private Care Home	CR4 4BF	Greenfield Care Homes Ltd	385-387, London Rd, Mitcham, Surrey
Private Care Home	SW20 9BA	Central & Cecil Housing Trust	Link House, 15, Blenheim Rd, Raynes Park, London,
Private Care Home	SW19 2HJ	Woodlands House Residential Home	Woodlands House, 118, Cavendish Rd, London,
Private Care Home	SW19 5DG	Lancaster Lodge	3, Lancaster Gardens, Wimbledon Village, London
Private Care Home	SW16 4HN	Eltandia Hall Care Centre	Middle Way, Norbury, London,
Private Care Home	SW19 5DE	Lee House	2, Lancaster Avenue, London,
Private Care Home	SW19 1SX	The Abbeyfield-Peabody South London Society	Pelham House, 32, Pelham Rd, London,
Private Care Home	SW19 8AA	Arthur House Residential Care Homes for the Elderly	110, Arthur Rd, Wimbledon Park, London,
Private Care Home	SW19 4LD	St. Pancras & Humanist Housing Association	Erica House, Worple Rd, London,
Private Care Home	SW19 1DB	Centrust Care Homes	6c-6d, North Rd, London,
Private Care Home	SM4 4BZ	Abbey House	455 Hill Cross Avenue, Morden, Surrey,
Private Care Home	SW19 4QT	Alexander House	12 Clifton Road, Wimbledon, London,

Category	Post Code	Name	Address
Private Care Home	SW19 8AA	Arthur House	110 Arthur Road, Wimbledon, London,
Private Care Home	CR4 2HT	Beecholme House	2-4 Beecholme Avenue, Mitcham, Surrey,
Private Care Home	SW20 0UE	Carter House	1&2 Franham Gardens, West Barnes Lane, London,
Private Care Home	SM4 4EL	Cherry Tree House	119 Monkleigh Road, Morden, Surrey,
Private Care Home	SW19 4EL	Kew House	58 Spencer Hill Road, Wimbledon, London,
Private Care Home	SW19 5DE	Lee House	2 Lancaster Avenue, Wimbledon, London,
Private Care Home	SW20 9BA	Link House	15 Blenheim Road, Raynes Park, London,
Private Care Home	SW19 1SX	Pelham House	32-34 Pelham Road, Wimbledon, London
Private Care Home	SM3 9JL	Sutton Court Care Centre	486-488 Sutton Common Road, Sutton, Surrey,
Library	SW19 2HR	Donald Hope Library	Cavendish House, High St, Colliers Wood, London,
Library	CR4 1LT	Pollards Hill Library	South Lodge Avenue, Mitcham, Surrey
Library	SM4 5DX	Morden Library	Merton Civic Centre, London Rd, Morden, Surrey
Library	CR4 2YR	Mitcham Library	157, London Rd, Mitcham, Surrey
Library	KT3 6JJ	West Barnes Library	Station Rd, New Malden, Surrey
Library	SW20 8BA	Raynes Park Library	Approach Rd, Raynes Park, London,



**Appendix 10**

**Potential Employment Sites**



## Assessment of Potential Employment Sites

This Appendix provides an assessment of a number of sites to determine their suitability for office development, or other employment uses.

### Allocated Undeveloped Sites

The potential for office development on 16 sites, which are all located within defined town centre boundaries, is summarised below.

**Station Precinct, Wimbledon town centre (1WTC):** This 3.75 ha site adjoining Wimbledon railway station comprises undeveloped land in various ownerships. Its main advantages for office development would be proximity to rail and other town centre services and would be among the most attractive locations in the Borough to office occupiers. It could potentially yield a very significant quantum of space (in excess of 50,000 m<sup>2</sup>) if the site was fully developed for offices.<sup>10</sup> However, there are significant constraints to delivery including the difficulty and cost of building over an operating railway station, as well as the need to relocate the existing rail depot adjacent to the station. This is therefore a longer term opportunity that is understood to be unlikely to fully come forward within the plan period. It is also allocated for other town centre uses. No office contribution is therefore likely from this site before 2021.

**Land Adjoining Wimbledon Theatre (3WTC/P4)** is a 0.2 ha surface car park on The Broadway in Wimbledon town centre. It lies within an established office area, with good access to public transport and town centre services, and is likely to be attractive to occupiers. Redevelopment could be partly constrained by the need to replace the public car parking, and proximity to the listed theatre building. However, assuming that 4 storeys of offices above ground level parking could be constructed on 80% of the site, it could yield in the region of 6,000 m<sup>2</sup> of new space subject to design constraints, although not all of this would necessarily be office space.

**Highlands House (4WTC)** is an existing seven storey office building on The Broadway in Wimbledon town centre. As with other sites nearby, this is an attractive location for office occupiers due to its access to a wide range of services and transport, and the current vacancy in the building is probably due to the quality and age of the premises rather than its location. However, the site is fully developed for offices above ground floor retail at a high density, and it is therefore difficult to envisage any net increase in office space if the site were redeveloped. Although some mixed-use schemes delivered in Wimbledon town centre in recent years are understood to have delivered a gain in office space, the UDP's identification of this site for retail and retail uses as well as

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<sup>10</sup> Based on a typical office plot ratio of at least 2.0 in a town centre location

offices, could potentially result in a significant decrease in office space if redevelopment occurred and no height increase was possible.

**196-200 and 220-224 The Broadway** (5WTC) comprise an existing town centre office building (which contains a language school) and the Wimbledon YMCA. As with the other sites in this area, this is a good, town centre office location with high levels of market attractiveness although at least 10 minutes walk from Wimbledon rail station and South Wimbledon underground station. The site has extant planning permission for an additional floor, change of use of two floors from D1 to B1 offices and a six storey extension. The most easterly part of the site is currently undeveloped. However, all this permitted space has already been included in the pipeline supply and the prospects of any further uplift in the quantity of office stock by 2021 above that already permitted appear low.

**St George Road Community Centre** (6WTC) is a small (0.09 ha) site also lies in Wimbledon town centre and occupied by a low density community centre. If redeveloped for office uses, this would be an attractive site for occupiers due to its proximity to town centre services and transport and its location within an established office area. The site has two public sector ownerships and it is likely that any redevelopment scheme would need to provide replacement premises for the community centre. In addition, the site is identified in the UDP for community and/or D2 leisure uses. However, the site would be suitable for a high-density office scheme and, assuming a five-storey building, could accommodate up to 3,500 m<sup>2</sup> of new office space if the community centre were relocated and subject to any design constraints.

**Land to the Rear of Morden Underground Station** (IMO) is a 2.16 ha town centre site which includes the tube station, offices above it, a retail parade and a multi-storey car park. The location has excellent public transport access, and a reasonable range of services in the town centre, but both are more limited than Wimbledon. This helps makes Morden a less attractive location for office occupiers, although there is still some demand from local firms. The site would be constrained by the difficulties and costs of building over rail lines, the need to replace the multi-storey car park, and the viability of redeveloping an occupied retail parade and office buildings. Furthermore, although the site could potentially accommodate a very large quantity of office space, there is quite limited market demand for offices in this area at present and the site is identified for a variety of other uses including retail. As a result, there may only be a small increase in office floorspace might be delivered as part of any redevelopment proposal. In any case, this is likely to be a longer term development that may not be delivered within the plan period.

**East of Holborn Way, Mitcham Town Centre** (IMI) comprises a number of separate small parcels of land totalling some 0.38 ha, some used for parking. Although public transport and local facilities are reasonable, the lack of an underground tube station and any established office market here make the location less attractive for office occupiers and developers unless market perceptions change significantly within the plan period. The need to replace

existing surface car parking, the fragmented nature of the site and the fact that it is identified in the UDP for residential, retail and leisure uses as well as B1 mean that the office space yield from this site is likely to be low and uncertain.

**St Mark's Road/Majestic Way, Mitcham Town Centre (2MI)** is a 0.4 ha town centre site currently occupied by a relatively modern multi-storey car park for Morrison's supermarket. The site is identified in the UDP for a variety of retail, leisure, business uses and parking. However, given the presence of the existing car park, which would probably need to be replaced as part of any redevelopment, and the fact that the site is owned by a retailer, significant office development coming forward on this site by 2021 appears unlikely.

**South of Majestic Way, Mitcham (3MI)** is a 0.41 ha site currently occupied by two storey, town centre retail units and associated car parking. It is allocated for A1, A3 and parking uses. As with the previous site, the existing modern retail buildings limit redevelopment opportunities unless further space can be developed above current premises. This would be possible but development costs for this type of scheme, lack of an office allocation and absence of significant market demand for offices here make it less likely that this site will deliver office floorspace within the plan period unless part of a larger mixed use or regeneration scheme for the centre.

Land at the **East Side of London Road between Armfield Crescent and Locks Lane, Mitcham (7MI)** is a 0.15 ha town centre site currently used as a surface public car park. Although the parking provision may need to be replaced, there appear few other constraints to redevelopment of this single owner site. However, the lack of an existing office market in the local area, the absence of an underground station and the site being identified for residential development in the UDP make it unlikely that any office space will come forward on this site.

**Junction of Western Rd / Love Lane, Mitcham (9MI)** is a 0.15 ha site currently occupied by a car repair workshop and taxi company. Redevelopment of the site for light industrial uses could slightly increase the floorspace on the site and would improve the quality of the premises, which are dated. However, the small size of this site, the lack of local market demand for offices here and the site's identification for either retail or B1 uses in the UDP mean that the delivery of significant office space on the site is unlikely.

**Adjacent to Gas Works, Western Road, Mitcham (10MI)** is a 0.1 ha site in Mitcham town centre currently occupied by a roofing supplier. The site is fully developed and identified in the UDP for either A1 or B1 use. It would not appear a particularly attractive location for office occupiers due to Mitcham's lack of an underground station, no established local office market and the relatively low-skilled workforce in the local area. The delivery of significant office space on this site within the plan period is therefore unlikely.

**Merantum Way, Colliers Wood Town Centre (2CW)** is a vacant 1.01 ha site identified in the UDP for open space with some housing. It is a backland site which adjoins residential tightly on one side and industrial on the other. Notwithstanding its allocation and the site's good road access and town centre

location, close to the underground station and bus interchange in Colliers Wood, adjoining uses do not make this a particularly attractive location for office uses. The very limited market demand for offices in this area would also make any new office development unlikely unless market perceptions can be changed over the plan period.

**2-34 Christchurch Road, Colliers Wood (3CW)** is a 0.12 ha site comprising the Colliers Wood underground station and a mostly single-storey retail parade. The site has excellent public transport accessibility, reasonable access to town centre services, and could accommodate significantly more floorspace through intensification. However, the difficulty of redeveloping existing buildings, including the underground station, which appear fit for purpose, the site's identification in the UDP for retail, community and transport interchange use, and its location within flood zone 3b are significant constraints. Furthermore, the relatively low demand and developer interest for office development in this location means that the site is unlikely to yield much office space within the plan period.

**182-192 Colliers Wood (5CW)** is a 0.18 ha site currently containing public housing and a car park opposite the tube station. This gives the site good public transport accessibility and reasonable access to town centre services. There is realistically very little land that could be redeveloped unless the housing were removed, which would be difficult in policy terms. Furthermore, the site is identified in the UDP for environmental improvements, pedestrian access into Wandle Park and junction/public transport improvements. These factors, along with low demand, poor perceptions of Colliers Wood as an office location, and its location within flood zone 3b make it unlikely that any office space will be developed on this site within the plan period.

**Thames Water Site, Byegrove Road (7CW)** is a site currently used as a water pumping station within a residential area in the north of Colliers Wood town centre. Any office development here would also have to be acceptable in policy terms, which gives preference to town centre locations for such development; however, this site does lie within the defined Colliers Wood town centre. The site has good access to public transport and other services, although it would have a relatively low profile for employment use as it lies away from major thoroughfares. It also lies within flood zone 3b. The availability of the site for development is not clear and there is relatively low office demand in this area. The site is identified for residential use in the UDP and so would have impacts on housing supply if developed for offices. Overall, there may be some limited potential for small-scale office units on the site as part of a mixed use scheme but the overall amount is likely to be low and the development timescale uncertain.

#### **Sites from Merton Business Premises Study**

Of the 26 sites identified as offering development opportunities ("opportunity sites") by the Merton Business Premises Study, only eight were indicated as

having potential to provide office-type premises that could accommodate business service or creative industries uses.<sup>11</sup> Many of these are industrial sites already assessed as part of the review of existing sites in Section 5 of the study but are reconsidered here as potential office locations.

**Bushey Road Industrial Area (E14)** is a 3.7 ha existing industrial area (already assessed in Section 5) in an out-of-centre location but with some potential for intensification due to much of the site being covered by surface car parking (1.3 ha). There is already an office building on the most westerly plot, with other uses including self-storage and retail warehousing. The site's prominent location adjacent to a junction on the A3 dual-carriageway means that it could potentially accommodate a high-profile office development, although the lack of a train/tube station and services close to the site would limit its market attractiveness. These factors and low demand here may explain why the existing site has not previously been developed and there is also significant vacancy in the existing office building. Furthermore, office development in this out-of-centre location would face policy constraints. Whilst the site could physically accommodate a significant amount of office space, the prospects of this occurring within the next 11 years are therefore low.

**Burlington Road Industrial Area (E11/E12)** is a large, out-of-centre industrial area covering several sites on either side of the A3. It also contains a school and some retail uses and is fragmented by roads and such non-industrial uses, with various land ownerships. There is potential for intensification on one plot close to the junction of Cavendish Road/Burlington Road, which is currently occupied by a derelict office/light industrial building. This is a less prominent site than E15, although it still has excellent road access as it is near to the A3 junction. However, as with the previous site, its relatively poor public transport provision, lack of services nearby, industrial character and out-of-centre location are likely to result in low demand and policy hurdles to any sizeable office development. The site also lies within zone 2. As a result, there are low prospects of significant office space coming forward on it during the plan period.

**Kingston Road / Wilton Crescent (N1):** this 0.07 ha) site lying between Wilton Crescent, Henfield Road and Kingston Road is occupied by an office/workshop unit in good condition. It is located in an out-of-centre, attractive residential location, adjoined by dwellings and some distance from underground or railway stations and local services but only 300 metres from the nearest tram stop. This very small site could potentially be used by creative industries, although it is unlikely that there is sufficient demand to justify the redevelopment of the site for office uses and residential amenity concerns may prevent a significant increase in floorspace during the plan period.

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<sup>11</sup> The types of use considered were environmental technologies, cultural and creative industries, advanced manufacturing, business services, retail, leisure & tourism and health, welfare & education. Of these, only cultural/creative and business services would be expected to occupy office space

The **Mitcham Gas Holder Site** currently has planning permission for a mixed-use scheme including 1,840 m<sup>2</sup> of B1 floorspace, whilst part of the **Windmill Trading Estate** also has extant permission for a mixed-use scheme including a 2,932 m<sup>2</sup> business centre. Both of these have already been included in the pipeline supply figures and are not considered further here to avoid double counting.

**Durnsford Road** (E5A/B) is a large industrial area covering around 21 ha in total. From the site inspection, it was not clear which parts of the estate the Business Premises study was referring to as having potential for business services, although there are several parts of the estate which have potential for intensification and redevelopment due to their existing low density and poor quality of buildings. Plots which face directly onto Durnsford Road are likely to be the most attractive for office developers/occupiers due to their higher profile and some existing plots in this location are already occupied by office buildings (e.g. around the junction with Weir Road). However, the area's has a predominantly industrial character and low attractiveness for offices due to this, amenity/environmental considerations and only moderate access to public transport and services. This is reflected in high vacancy levels in the existing buildings around this area. Overall, any significant office space gain here appears unlikely within the plan period.

**Rainbow Industrial Estate** (E16) is a well enclosed industrial area (2.5 ha) surrounded by railway lines and accessed through a narrow road under a railway bridge. Although adjoining the town centre, the site's separation from other uses make it a good quality site for its current industrial uses, but the predominantly industrial environment is likely to deter piecemeal office development. However, a comprehensive redevelopment of the site could potentially deliver a high density, urban office campus, which could be attractive to the market as a result of close proximity to Raynes Park railway station and reasonable access to the A3. However, a large speculative development of this sort in an untried office location with railway surroundings may not be viable in current market conditions. It is understood this site could become available for redevelopment in the next five years.<sup>12</sup> If it did, this site would have physical capacity to provide 15,000 - 20,000 m<sup>2</sup> of office space,<sup>13</sup> perhaps with some other town centre uses other than retail, although there are likely to be pressures for uses such as waste management and achieving that amount of offices is therefore unlikely within the plan period.

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<sup>12</sup> Land Availability Study for South London Waste Plan, King Sturge, June 2010.

<sup>13</sup> assuming a plot ratio of 0.6 to 0.8 for an urban business park