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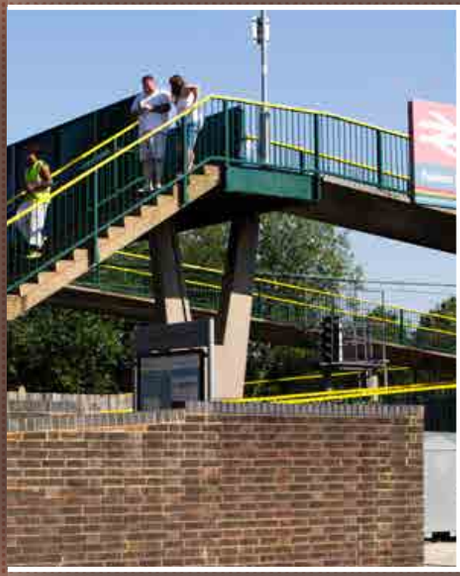


Property & Economic Review

6.1 Introduction

6.1.1 This chapter starts by reviewing some of the local economic factors which have major influence in Enfield, such as employment and labour markets, socio-economic and demographic factors, and the local housing market. Each of these has major effects on the local property market in North East Enfield.

6.1.2 This review of local economic factors is followed by a property market review where we examine the key use types; employment, residential and retail and leisure, in the local North East Enfield market context. The key economic factors shaping the property market in and around North East Enfield are examined in this chapter, followed by greater focus on the property market across the area.

6.2 Key Economic Factors: Enfield Overview

Economic Overview

6.2.1 Enfield holds a strategic position, sitting within the robust economy of London and the London-Stansted-Cambridge corridor into Hertfordshire and Essex that links Enfield with Stansted and Cambridge. The Upper Lee Valley which is a significant part of the Enfield Borough is also designated as an Opportunity Area (by the Greater London Authority) with the capacity to accommodate up to 15,000 new jobs and 900 new homes by 2016 (Skills and Employment Strategy, 2012).

6.2.2 Despite the opportunities that this strategic location presents and the position it holds within the London Stansted Cambridge Growth Corridor, the Borough of Enfield economy remains relatively weak. The sectoral weaknesses and the lack of presence in growth sectors such as high tech and knowledge intensive industries, and reliance on traditional (declining sectors) is clear, which make the Borough vulnerable in terms of the present volatile economic environment. It is also thought that development has been hindered by a number of local factors. These local factors include (as per the Skills and Employment Strategy, 2012); transport bottlenecks, blighted industrial estates, some neighbourhoods have poor quality urban fabric, degraded environment and perception of high crime rates.

6.2.3 The area is however undergoing a number of regeneration initiatives and projects which will assist its economic development; such as the Industrial Estates Strategy, Alma Road Regeneration and others. Also transport improvements are expected in the short and long term which will hopefully improve economic prosperity in North East Enfield. In the short term increased frequency of trains on the present rail line linking Ponders End to Hertford and London Liverpool Street are expected and in the long term Crossrail 2 would also provide vital new connectivity for Islington, Hackney, Tottenham and the Lee Valley in north-east London. The Crossrail 2 link is expected to assist in driving regeneration, similar to how the extension of the tube drove London's expansion and regeneration of the outer areas in the 1930's (Crossrail 2: Supporting London's Growth, 2013). Crossrail 2 is however not expected to be delivered until 2029/2030 at the earliest.

6.2.4 There are a number of economic factors that are shaping the prosperity of the area. The key economic factors discussed are in three themes:

- socio-economic profile and deprivation;
- housing and physical environment; and
- business formation, key sectors and labour market,

Socio-Economic Profile and Deprivation

6.2.5 Enfield has a high level of deprivation and inequality with some neighbourhoods in the East (which includes North East Enfield - NEE) and South classified as the most deprived in England. Enfield is ranked as the 64th most deprived local authority district in England (of 326) and this position is worsening (Enfield Council Deprivation Update, 2011). Within the Enfield Local Authority there are 21 wards, and 5 in the North East Enfield (NEE) Area. The NEE wards are: Ponders End (4/21), Southbury (10/21), Turkey Street (5/21), Enfield Lock (8/21) and Enfield Highway (7/21). The brackets represent the wards respective place on the IMD rankings within the whole of Enfield Borough, where 1 is the most deprived (Enfield Council Deprivation Update, 2011). NEE is thus relatively deprived compared to Enfield as a whole and Enfield itself is relatively deprived when compared to other London Boroughs.

6.2.6 Income deprivation is severe in Enfield, with 24% of residents being classed as Income Deprived (Enfield Council Deprivation Update, 2011). Child poverty is also worsening; the incidence of child poverty rests at 39.8% of the total population of under 16's (Enfield Council Deprivation Update, 2011). Income and child poverty is particularly severe in North East Enfield (NEEAP Interim Direction Document, 2012). This concentration of deprivation in NEE reflects the high concentration of low skills and worklessness in North East Enfield (NEEAP Interim Direction Document, 2012/NOMIS, 2013)

6.2.7 Enfield's overall population is growing (up 6.5% between 2001 and 2009) but this is relatively slower than 8% growth witnessed across London overall. More people left the Borough than in-migrated, and there is a significant population 'churn' equivalent to 7% of the population annually (Skills and Employment Strategy, 2012). This 'churn' is reinforced by the high level of private rented and social housing in the area, which results in a less locational tied population.

6.2.8 Part of this in-migration has been due to the relative affordability of the Borough's rental accommodation, particularly in the south and eastern (which includes NEE) side of the Borough where there is a concentration of social housing and rented accommodation. In migration has resulted in a socio-demographic change, with a higher number of residents from ethnic minorities, single parents and an increasing number of vulnerable groups (NEEAP Interim Direction Document, 2012)

6.2.9 The population is imbalanced with a high proportion of the elderly and young children, both of which affect the proportions of economically active workers which impacts the labour market (Skills and Employment Strategy, 2012).

Housing and Physical Environment

6.2.10 Enfield offers some of the cheapest rental accommodation in London. There is a concentration of social housing and cheap rental accommodation in North East Enfield (NEEAP Interim Direction Document, 2012). Again, however there are pockets of wealth and deprivation revealing the opportunities for improvement in the housing market.

6.2.11 Within Enfield the crime rates are low, however in Ponders End the crime rates are high – and criminal damage rates are high in Enfield Lock and Enfield/Highway. These factors will affect the demand for businesses considering locating in the area, as will the physical environment aspects and public realm which require investment.

Business Formation, Key Sectors and Labour Market

6.2.12 Employment in the area is predominantly low skills and low wage (NEEAP Baseline, 2007). North East Enfield has strengths in industrial and distribution sectors (B2-B8 use types), with Brimsdown a key industrial location within London. Similar to the UK the manufacturing sector is shrinking yet the wholesale and retail, urban logistics, hospitality and general business services sectors have witnessed some growth.

6.2.13 Enfield similar to other North London Boroughs has a higher proportion of workers employed in manufacturing, construction and distribution activities than London as a whole. Enfield has a high proportion of its employment in the 'health and education' sectors and conversely a very low percentage in the 'financial and insurance', 'information and communications' and 'professional, scientific and technical services sectors' (ELS, 2012). This sectoral skew thus shapes demand in the commercial property market. The reliance on public sector employment is also more notable in Enfield Borough than London as a whole (see table overleaf).

6.2.14 Enfield has a lower skills base than the wider London area with far fewer residents achieving NVQ1-NVQ4 and above qualifications, with far more residents achieving no or other qualifications. This low skills base is reflected in the high level of worklessness, whereas employers increasingly require higher level skills (NEEAP Interim Direction Document, 2012). This skills base has also resulted in employers in growing sectors noting the difficulty in attracting applicants for skilled jobs (NEEAP Interim Direction Document, 2012), there is thus a notable skills gap negatively affecting the levels of worklessness.

6.2.15 The number of working age benefit claimants went up by 3,470 (12%) in the two years to August 2010 to reach 33,320 – the 7th highest increase in London. The Job Seekers Allowance claimant count increase was the 7th highest in London over three years (Enfield Council Deprivation Update, 2011).

6.2.16 The Enfield Borough economy relies more heavily on small business than other Boroughs, characterised especially by microbusinesses (Skills and Employment Strategy, 2012). Small firms (0-10 employees) are a very important growth segment, and account for 87% of all firms in the Borough; however, they account for only 22% of jobs (Skills and Employment Strategy, 2012). The larger firms in Enfield (200+ employees) account for 16% of jobs in the Borough. Thus the middle size companies deliver the greatest number of jobs.

6.2.17 There are higher rates of business failure in Enfield than the wider London area, the stock is however increasing as deregistration rates are below the rate of registrations (NOMIS, 2013). The enterprise formation rate in Enfield is relatively low but comparable to other nearby Boroughs such as Waltham Forest and Redbridge (Skills and Employment Strategy, 2012).

6.2.18 Employment within the Borough is relatively self-contained, with over 50% of workers in low skilled jobs working within the Borough, whilst those in higher skilled jobs tend to out-commute (Skills and Employment Strategy, 2012). This has implications for local spend but also is revealing of

	Enfield (employee jobs)	Enfield (%)	London (%)	Great Britain (%)
Total employee jobs	92,500	-	-	-
Full-time	63,200	68.3	73.9	68.8
Part-time		31.7	26.1	31.2
Employee jobs by industry				
Manufacturing	29,300	5.8	4.3	10.3
Construction	5,400	6.0	2.9	4.8
Services	81,300	87.9	87.9	83.5
Distribution, hotels & restaurants	24,000	26.0	21.0	23.4
Transport & communications	6,300	6.9	7.4	5.8
Finance, IT, other business activities	17,700	19.1	34.7	22.0
Public admin, education & health	29,000	31.4	22.2	27.0
Other services	4,200	4.5	7.2	5.3
Tourism-related	6,300	6.8	8.3	8.2

Table 6.1: NOMIS: Employee Jobs (2008)

	Enfield (numbers)	Enfield (%)	London (%)	Great Britain (%)
NVQ4 and above	68,900	36.1	47.6	34.4
NVQ3 and above	97,700	51.1	63.2	55.1
NVQ2 and above	123,900	64.8	75.1	71.8
NVQ1 and above	148,800	77.9	83.6	84.0
Other qualifications	23,900	12.5	8.0	6.3
No qualifications	18,400	9.6	8.4	9.7

Table 6.2: NOMIS: Qualifications Jan 2012 - Dec 2012

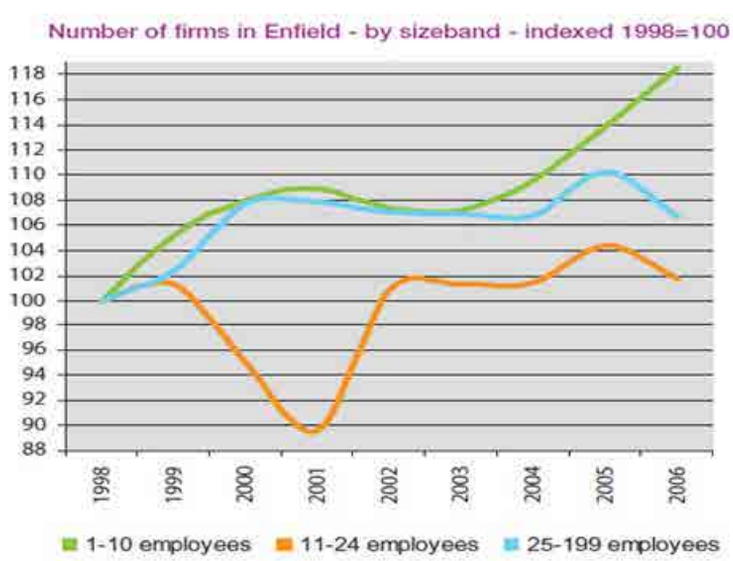


Figure 6.1: Number of firms in Enfield - by sizeband - indexed 1998=100

	Enfield (nos)	Enfield (%)	London (%)	Great Britain (%)
Registrations	995	12.7	12.8	10.2
Deregistrations	795	10.1	8.6	7.3
Stock (at end of year)	7,840	-	-	-

Table 6.3: NOMIS: VAT Registered Businesses

the importance of the industrial/traditional sectors for local employment.

Summary

6.2.19 There is a need to attract more people with higher skills levels into the area and attract more businesses offering higher paid jobs to address the deprivation issues (NEEAP Interim Direction Document, 2012). Increasing activity in the growth sectors and higher GVA industries will increase the competitiveness of the North East Enfield economy. The low GVA/industrial sectors are however of great importance to the local economy, and strategically within London. At present the growth sectors have limited presence.

6.2.20 There is a perpetuating cycle in place attracting lower skilled, lower income residents to the area due to the lower rents and values which makes it difficult to attract higher value jobs/occupiers into the area. In terms of the property offer, high value office developments are thus unlikely to be attractive to the local market and those looking to relocate traditional B1 uses. This does not however exclude possibilities for high value growth; however these are likely to be driven by current strengths that the area holds such as its strategic location, and industrial/employment land concentrations.

6.2.21 The industrial strength of the area offer opportunities for growth as do the high number of small businesses (unfortunately further information as to the types of companies forming is not available). Capitalising on these strengths will cater to both the local and wider London economies. The industrial reliance in the Borough, despite its strategic and local relevance does however impose limitations at present in terms of the generally lower income jobs it provides.

6.3 Property Market Review: North East Enfield

6.3.1 The property market review has been compiled using existing property market reports, policy information and evidence documents compiled by Enfield Borough Council. Aspinall Verdi have also undertaken primary research into the property market utilising data from Estates Gazette, Land Registry, Zoopla, and discussions with local property agents.

6.3.2 Estates Gazette Interactive (EGi) presents the most robust data on property transactions undertaken for commercial properties; however we must note that not all properties may be captured on this site.

6.3.3 The property market review is split into three sections:

- employment uses;
- retail and leisure; and
- residential.

Employment Use

Industrial (B2 – B8)

6.3.4 In 2010 Enfield Borough had over 500 hectares of employment land, the vast majority of which (485.4 ha at 2010) was utilised used for industrial uses (Employment Land Review, 2012 – see table 6.1). Many of the borough's strategic industrial locations lie in North East Enfield, at Brimsdown, Great Cambridge Road and Martinbridge Trading Estate. Along with these larger strategic estates there are a number of smaller estates such as the Meridian Business Park, and modern estates at Innova Park and Freezywater. There is thus a large breadth of accommodation available for various types of industrial occupants.

6.3.5 The larger industrial estates in North East Enfield are often subdivided into smaller estates; for example, the Brimsdown Estate is subdivided into seven smaller estates, as is Meridian Business Park which has four main sub-areas: Valleylink Estate, Navigation Park, Vantage and the former Aesica site.

6.3.6 Brimsdown in the Lee Valley is a key industrial site in North East Enfield (NEE) it has one of London's largest concentrations of commercial and industrial land in a contiguous area (NEEAP Baseline, 2007). It is noted as a strategically important area, and in the London Plan as a preferred industrial area (NEEAP Baseline, 2007).

6.3.7 NEE offers a range of industrial accommodation, appealing to a wide range of industrial occupiers. The industrial accommodation across NEE caters to both national and local demand with the larger estates/more prestigious estates attracting national and international occupiers, whereas the smaller or older estates traditionally cater for more localised demand.

6.3.8 Enfield's industrial estates are a critical asset. Enfield sits at the heart of a major growth corridor – the London Stansted Cambridge Corridor which is expected to positively impact demand. There are aspirations for linkages between the 2 areas (London-Cambridge) to be improved, and for NEE to advance its role as an internationally orientated business location (Enfield Core Strategy, 2010). The emerging Enfield Industrial Estates Strategy (2013, Peter Brett Associates) notes the objectives and strategic approach to be taken in respect to the industrial estates.

6.3.9 It is understood hat businesses/occupiers have concerns regarding the congestion within the industrial estates and the NEE area. There are proposals for a scheme to create a new link road between the Brimsdown area and the Upper Lea Valley to Junction 26 of the M25, the scheme is known as ENGAP; it is anticipated that this scheme would significantly improve transport links and potentially generate further economic investment within the Borough .

6.3.10 The employment accommodation in Enfield is dominated by industrial uses, with rising demand and falling vacancy noted across most industrial estates (AVL Consultation with Peter Brett Associates).

6.3.11 Employment land is in tight supply in London, forecast to be restrained further by the loss of employment land to residential uses in other Boroughs across the City. The displacement of firms from other Boroughs thus increases demand for employment use (ELS, 2012/AVL consultation). A noted growth sector is the services end of manufacturing; these occupiers choose Enfield because they need to efficiently access the London strategic road network, the national motorway network and also be close to their customer base (i.e. London residents).

6.3.12 Green industries (waste and recycling) already take up significant land in Enfield and there is growth forecast in the sector with further legislative changes increasing pressure to recycle. Operations are thought to be becoming more sophisticated and 'closed' and thus the property requirements can be similar to B2 general industrial space (ELS, 2012). The potential for the promotion and branding of the green industries may therefore be an element of the emerging Industrial Estates Strategy, although this will require further investigation.

	2001	2006	2010	2001-10
Industrial Uses				
Traditional Industrial Groups				
General industry	167.4	153.6	151.6	-15.8
Warehouses	135.8	152.8	164.0	28.2
Sub total Traditional Industrial Groups	**303.2**	**306.5**	**315.6**	**12.4**
Broader Industrial Groups				
Self storage	4.0	4.0	4.0	0.0
Waste management and recycling	30.8	30.8	37.4	6.6
Utilities	88.0	82.6	82.6	-5.4
Land for rail	4.8	4.8	4.8	0.0
Land for buses	2.0	2.0	2.0	0.0
Vacant Industrial Land	55.5	54.7	38.9	-16.6
TOTAL INDUSTRIAL	**488.4**	**485.5**	**485.4**	**-3.0**
Non Industrial Uses				
Office	0.0	4.8	4.8	4.8
Retail	0.0	11.1	11.1	11.1
Residential	0.0	3.0	4.2	4.2
Recreation and leisure	0.0	5.6	5.6	5.6
Community services	0.0	1.6	1.6	1.6
Other non-industrial	0.0	2.1	2.1	2.1
TOTAL NON-INDUSTRIAL	**0.0**	**28.3**	**29.4**	**29.4**
TOTAL	**488.4**	**513.8**	**514.8**	**26.4**

Figure 6.2: Enfield industrial land by land use (Employment Land Review 2012)

6.3.13 The findings of the Peter Brett Associates' emerging Industrial Estate Strategy suggests that subtle interventions should be undertake for each individual industrial estate, such as traffic enforcement, creating high quality environments, substantial security and crime reduction measures .

6.3.14 The key drivers of growth in the industrial sectors are (ELS, 2012/AVL Consultation PBA):

- displacement – including the services end of manufacturing;
- internet delivery - e-retailing and distribution; and
- green industries – waste and recycling uses.

6.3.15 All industrial properties are thought to be in high demand, in particular for light industrial (B1 – c), services sectors seeking B1c/B2 space and warehousing/distribution units (B8). Companies however frequently utilise space that is not traditionally associated with their industry, for example industrial and shed units have been found to host a range of activities - film production, e-trading and catering (ELR, 2012). Provision of industrial/light industrial accommodation that is flexible between user groups doesn't therefore rule out the movement towards less traditional sectors or higher value sectors, and allows local need and demand to be satisfied.

6.3.16 In North East Enfield there are a lack of sites suited to meet the needs of either new large scale distribution users or large scale waste facilities (B8) due to the limited supply of land, neighbouring use restrictions and access limitations; therefore it is likely that existing premises in North East Enfield would need to be redeveloped to meet this demand.

6.3.17 An opportunity exists in the delivery of flexible space that may be used for light industrial B1(c)-B2 type users. This type of space has the capacity to accommodate service uses, and small scale green industries as well as many other user groups. Consultation with PBA has confirmed that smaller units of sub 5,000 sqft are in greatest demand, with greater competition (existing availability) in the larger size categories.

6.3.18 In terms of future demand it is not thought that the upgrading of the rail line or the Crossrail 2 project will have significant impact on industrial demand. The former as most estates are accessed by Road users, rather than rail – and the latter because of the time frame of the project (Enfield Industrial Strategy, 2013). The new Crossrail 2 line is not expected to open until 2029/30 at the earliest.

Industrial Demand

6.3.19 To gain better understanding of B2/B8 demand in North East Enfield, we analysed the take-up (demand) of industrial premises over the period between November 2007 – November 2013. During this period 2.7m sqft of industrial floorspace was transacted within the study area, over a total of 81 units; 57 of these transactions were for premises in the area of the Brimsdown Estate.

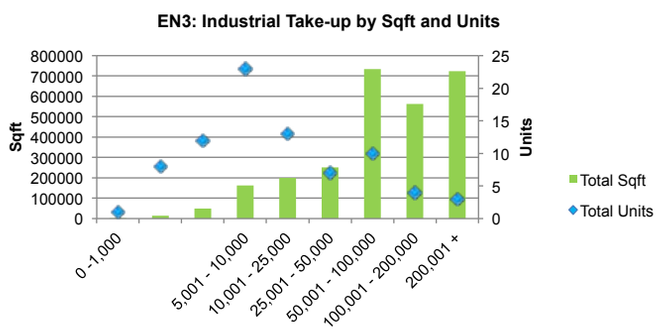


Figure 6.3: Industrial take up in EN3 (EGI 2013)

6.3.20 Figure 6.3 illustrated that the unit size in highest demand was in the 5,001 – 10,000 sqft category, with 23 transactions taking place for over the 6 year period. The unit size in lowest demand was the smallest category (under 1,000 sqft) as only one transaction occurred. The largest amount of floorspace (sqft) transacted was in the 50,001 - 100,000 sqft category, over a total of 10 transactions. We understand that 23 of the total transactions were for mixed industrial units (B1/B2/B8).

6.3.21 Due to the volume of take-up on the Brimsdown Estate, we also reviewed the demand for properties within this estate over the same period. As mentioned before, 57 transactions took place over this timescale, with a total of 1,551,179 sqft of floorspace transacted. These figures equate to 70% of the total units in EN3, though only 57% of the total floorspace.

6.3.22 The units in the 5,001 – 10,000 sqft category are in highest demand on the Brimsdown estate. As expected the number of units taken-up in the larger space category is relatively low; however these equate to a significant amount of floorspace of the total take-up at Brimsdown.

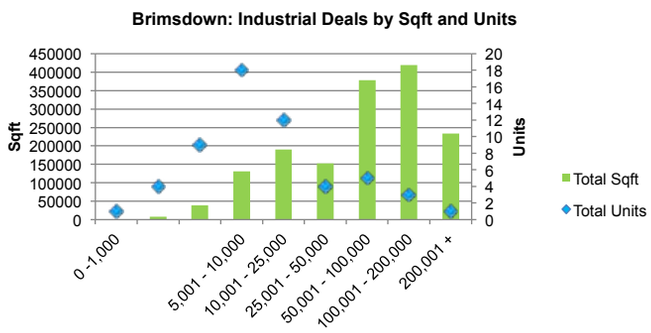


Figure 6.4: Industrial take up at Brimsdown Estate (EGI 2013)

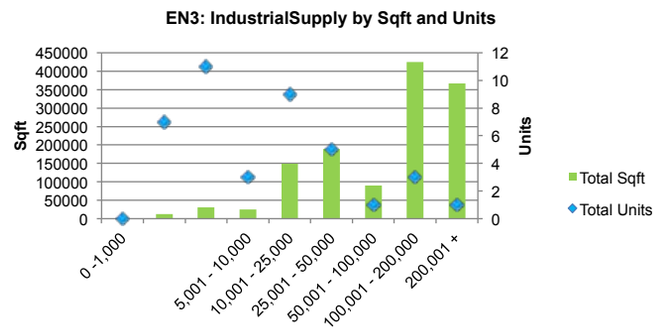


Figure 6.5: Industrial supply EN3 (EGI 2013)

Industrial Supply

6.3.23 Similarly, we reviewed the supply (availability) of industrial premises in North East Enfield so that we were able to understand the quantum of space available to occupiers. There is currently 1,290,223 sqft available over a total of 40 units. It must be noted that 39 of these properties are listed as mixed industrial (B1/B2/B8) units.

6.3.24 The greatest supply is within the 2,501 – 5,000 sqft category with 11 premises of this size on the market. In contrast to take-up, one of categories in the lowest supply is the 5,001 – 10,000, with only 3 available units; suggesting that this size of unit is in high demand in North East Enfield.

6.3.25 Due to a large quantum of available units (24) being located on the Brimsdown Estate, we also reviewed the supply at this specific site. There is currently 1,003,544 sqft available over 24 units on this industrial estate, which equates to 77% of the total floorspace available in North East Enfield, and 60% of the units available to occupiers.

6.3.26 The largest quantum of units available on the Brimsdown Estate are between 10,001 – 25,000 sqft, with 9 units available to occupiers. There are only two units available sized between 2,501 and 5,000 sqft on the Brimsdown Estate.

Industrial Values

6.3.27 It is suggested that rents for industrial units may have been increasing since the recession (ELS, 2012). Of the deals recorded the value range has been £4.50 - £14 psf, with an average achieved/registered average value of £8 psf. The CIL Viability Study (2013) utilises a rent of between £7-9 psf.

6.3.28 The average rents psf paid for industrial premises over the period between November 2007 – November 2013 were reviewed. The average rent paid throughout North East Enfield for industrial units was £7.64 over this timescale. However, we also reviewed rents paid in each size category to gain better understanding of the different rents paid for particular sizes. We tabulate our findings below.

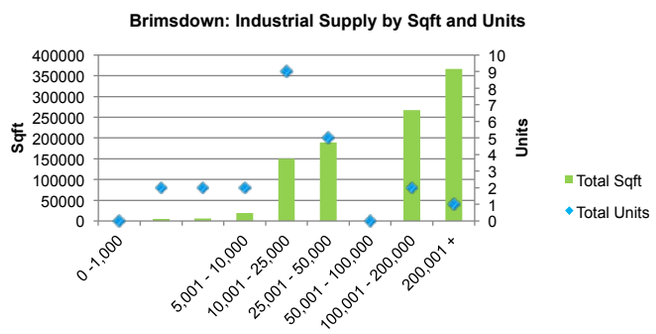


Figure 6.6: Industrial supply on Brinsdown Estate (EGI 2013)

Category	Rent PSF (£)
0 - 1,000	11.35
1,001 - 2,500	9.16
2,501 - 5,000	6.65
5,001 - 10,000	6.93
10,001 - 25,000	8.90
25,001 - 50,000	7.21
50,001 - 100,000	6.82
100,001 - 200,000	7.90
200,001 +	8.46

Table 6.5: Average rents (EGI, 2013)

6.3.29 The highest rents paid are for units sized below 1,000 sqft. The lowest rents paid are for the units sized between 2,501 – 5,000 sqft; this may due to the fact that these rents may be on an all-inclusive basis. The units sized above 200,000+ sqft are likely to have higher than average rents due to the high demand for warehousing and distribution premises in the area.

6.3.30 Yields for good secondary distribution are expected to be around 8.25% or 6.5% prime units (Knight Frank Secondary Commercial Yields Research, 2013/CBRE Prime Rents and Yields Monitor). Yields applied to all commercial property in the recent CIL viability study (2013) are 6 and 7%.

Work Hub / Start-Up Centre

6.3.31 Enfield's economy has a large number of small businesses, accounting for 87% of the total businesses registered, though only 22% of jobs (Skills and Employment Strategy, 2012). The birth of new business does exceed the deaths which means the overall small business stock has been increasing since 1998 (Skills and Employment Strategy, 2012). Enfield also has a high incidence of home working relative to the rest of London, and is forecast to grow (ELS, 2012). This has been noted, as has the potential for small businesses/home workers to seek space in 'work hubs' which offer the mid-ground between traditional space and homeworking.

6.3.32 The high rates of business formation and small companies, and the forecast growth in homeworking provide an opportunity for a work hub that can offer space for entrepreneurs, as recognised in the Employment Land Review (2012). A work hub that offers shared space for home workers on a flexible basis, as well as a mix of units/workspaces suitable for a range of businesses at an affordable level would be appropriate. These workspaces may range from 150 – 1,500 sqft and be suited to workshops and/or offices rather than purely office space.

6.3.33 At present managed workspace is available at the Wenta Business Park (formerly the Business Innovation Centre (BIC)) at Innova Park/Electric Avenue which offers office units from 110 – 1,200 sqft (equating to 75% of the provision) and a range of workshop spaces rom 110 – 627 sqft (equating to 25% of the provision). Consultation with the Wenta Business Centre has revealed that there is a total of 63 units with only 14 currently available (reflecting a 78% occupancy rate). The greatest demand at present is for smaller office units suited to 1-3 people, with demand mainly from local companies seeking flexible leases. There is no sectoral dominance, or particular industry that has been demanding space. The centre has only been run by Wenta for 6 months thus further qualitative information is not available.

Office (B1) Uses

6.3.34 The study area is not an established location for office (B1) based activities, and there are few established office locations within it. Innova Park at Enfield Lock is the key office location in NEE; however there has been limited interest for further office development at this site. Innova Park was developed as a campus/business park style scheme offering modern office accommodation. The development included a 2,800 sqm (30,000 sqft) office building plus a business innovation centre currently let as small business/workshop units. The aim of establishing a new office based innovation quarter at Innova Park has not been realised and land to the South has now been utilised for residential development. Furthermore Innova Park has been more popular for industry and warehousing than office (ELS, 2012).

6.3.35 As part of the Employment Land Study (2012) a property market consultation workshop was undertaken, the outcome of which confirmed that Enfield was unlikely to attract significant office interest/activity; this conclusion has been verified from our own consultations with property agents active in the local market. We understand that there is relatively little developer interest to build speculatively reflecting the modest rental levels that can be achieved compared with the more attractive returns to be secured from other employment uses such as light industrial/workshop and distribution space (NEEAP Baseline, 2007/ELS, 2012). Very little inward investment has been secured in this sector (NEEAP Baseline, 2007).

6.3.36 The majority of office accommodation is ancillary to industrial units (NEEAP Baseline, 2007) and there is no latent office demand for traditional office units (AVL Consultation, 2013). It is pertinent to note that the new permitted development rights (under the Coalition) allow change of use from B1 (office) to C3 (dwellings) without the need for planning permission. This could lead to further reduction in the office space available within the area. The loss of office floorspace is a potential concern as it reduces the office stock in the area and restricts the choice of space available for occupiers. With the trend for new start-up businesses increasing; demand for office space is likely to be predominately focused on the sub 5,000 sqft category and therefore sub-division of some of the larger vacant office buildings into smaller units should be encouraged in order to meet the type of demand for offices within this area.

Supply

6.3.37 Only 13 office units are presently advertised via Estates Gazette in North East Enfield. Six units are at Innova Park and three at Island Centre Way (see details on these schemes below). The other units are dispersed across the area. The office market is very limited, and it is unlikely that in the short-medium term that transport improvements in the area will have significant impact on improving the appeal of the area to occupiers.

6.3.38 Figure 6.7 illustrates that the largest supply of office units in North East Enfield are those sized between 2,501 sqft and 5,000 sqft, with five currently available; three of these units are clustered in close proximity to the M25. As mentioned above, the larger offices may have the potential to be subdivided into smaller offices or converted into managed workspaces, to supply smaller units thus helping to meet the needs of smaller SME occupiers. However, further investigation and analysis of these properties is required in order to ascertain their suitability and viability for sub-division.

6.3.39 Only two of the 13 offices in North East Enfield are located on the Brimsdown Estate. One is sized 1,399 sqft, and the other is a larger unit of 11,722 sqft, however thus is due to it being a mixed use unit (B1 and light industrial), according to information published on EGi. .

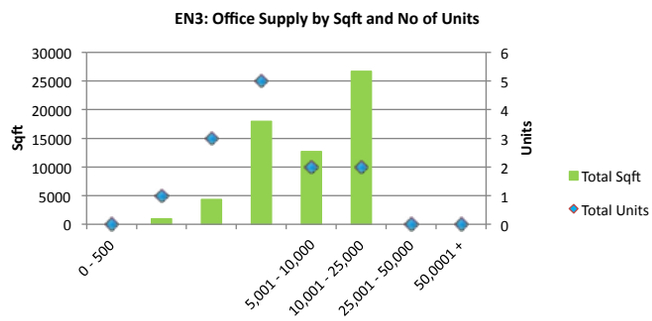


Figure 6.7: EN3 Office supply (ENI, 2013)

Demand

6.3.40 Over the November 2007 – November 2013 period, only 23 office deals have been registered on Estates Gazette in the EN3 Postcode. Clearly, this is a relatively limited number which demonstrates the low level of demand for office units in North East Enfield, particularly when considering the buoyancy of the London office market in other outer London Boroughs, particular in south and west of London.

Location	Size	Qupting Rent (£/psf)	Description	Agent
Innova Park/Electric Avenue Business Park	110 – 1,200 sqft	£7 - £15	This business centre provides office space and workshops for rent, virtual office and mailbox services and training and meeting room facilities. There is a variety of companies located at this centre. It offers a mix of both offices (between 110 and 1200 sq ft) and workshops (from 110 to 627 sq ft) to rent.	LSH
Innova Park/ Innova House	3,000 – 15,000 sqft	£17	Innova Park is part of a 100 acre mixed use site with a travel inn Hotel, 3 standalone office buildings and car parking and is located in North London in Enfield lock, which forms part of the Lee Valley area.	Page and Read
Island Centre Way	960 – 1,690 sqft	£15	Once home to the Royal Small Arms Factory, The RSA Island Centre at Enfield Island Village is built around a canal with a range of shops, and small businesses housed in the renovated Grade 2 Listed building.	Gilmartin Ley Limited

Table 6.6: Current office availability EN3 Enfield (Estates Gazette, 2013)

6.3.41 The highest take-up is for offices sized between 1,001 and 2,500 sqft, closely followed by 5,001 and 10,001 sqft. The sizes in lowest demand are those sized below 500 sqft and above 50,001 sqft.

6.3.42 The highest take-up is for offices between 1,001 and 2,500 sqft, closely followed by 5,001 and 10,001 sqft. The units in lowest demand are those sized below 500 sqft and above 50,001 sqft.

6.3.43 According to the recent Employment Land Study; the office market in Enfield has failed to develop to any significant extent and we do not envisage it being strong going forward (ELS, 2012; AVL Consultation). There may be some small local office demand within the local centres perhaps or potentially coming forward as part of wider mixed use developments. Rather than traditional offices some of the growth in business service sectors may instead be accommodated through homeworking, work hubs or similar types of new informal workspace (ELS – 2012). Crossrail 2 may also bring long term potential to the Borough as the network will make it closer to central London, and therefore the attractiveness of the local office market may improve.

6.3.44 In producing this updated, Aspinall Verdi consulted with commercial agents acting in the local market, they also confirmed that demand for offices in the North East Enfield area is limited; one agent thought most of the offices in the area were occupied, though was unsure there would be further demand unless it was from local Small and Medium Enterprises (SMEs).

6.3.45 The agents' view was that the demand for office space was mostly local, or for businesses who are unable to pay Central London/City rents – most existing B1 premises are of low grade with low rents which attracts start-up companies that are unable to afford the higher inner London /City Centre rents.

6.3.46 It was also noted that the office market is unlikely to grow in the area due to its close proximity to the City of London, and its strong industrial location. However, one agent thought that if low value accommodation was to be provided, and in a strategic location – i.e. near public transport and amenities – there may be demand from local SMEs. It was also noted that NEE, as an area of North London is under pressure from residential conversions/developments due to housing demand, particularly in underperforming employment areas. Their view was that NEE should aim to retain employment land and improve existing stock otherwise inward investment is likely to decline if this land be lost to residential development.

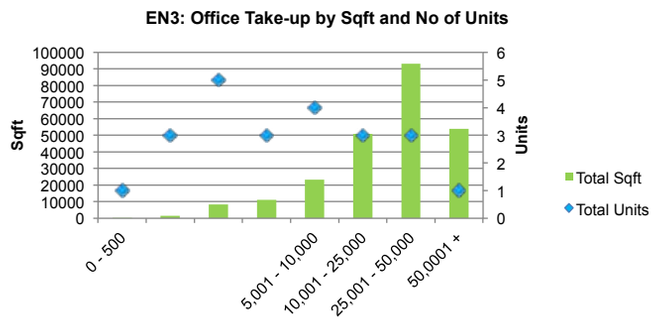


Figure 6.8: EN3 Office take-up (ENI, 2013)

Office Values

6.3.47 Rental values for offices are far below what can be achieved relative to other London Boroughs, the average rental value for offices is £13 psf (based on average rents achieved 2007 – 2013 (EGi database). The CIL viability study does not differentiate between values for B1-B8 uses revealing the low value nature of the office market. The lack of demand for office units thus implies that there is likely to a high level of incentives and rent free periods on offer in order to attract occupiers.

6.3.48 The average rents psf paid for B1 premises over the period between November 2007 – November 2013 were reviewed. The average rent paid throughout NEE for B1 office units was £10.98 over this timescale. However, we also reviewed rents paid in each size category to gain better understanding of the different rents paid for particular sizes. We tabulate our findings below.

6.3.49 The highest rents paid psf over this period was for units in the size categories 25,001 – 50,000 sqft, 501 – 1,000 sqft and 5,001 – 10,000 sqft. The lowest rent paid was at £3.00 psf for one unit sized between 10,001 and 25,000 sqft; this particular unit was described as a B1 garage/workshop and is of low grade, hence the low rent value.

Category	Rent PSF (£)
0 - 500	6.67
501 - 1,000	16.38
1,001 - 2,500	10.74
2,501 -5,000	10.24
5,001 - 10,000	14.33
10,001 - 25,000	3.00
25,001 - 50,000	15.49
50,001+	-

Table 6.7: B1 Average rents (EGI, 2013)

6.3.50 Good secondary office yields in central London were at 5.75% in June 2013 (Knight Frank – Prospects for Secondary Commercial Property) for secondary south east towns this yield was 11%. Yields applied to all commercial property in the recent CIL viability study (2013) are 6 and 7%. For new office/B1 type accommodation it would thus be reasonable to expect a 7% yield for well-located/designed accommodation.

Residential Market

Residential Property Market Enfield

6.3.51 Consultation with local agents has established that demand is high for all house types within the NEE area (Agents Consultation, AVL – 2013). This is in part due to the high levels of demand in London as a whole for residential units, and the noted lack of new developments in NEE other than at Enfield Lock (Consultation, AVL 2013; SHMA, 2010).

6.3.52 According to the SHMA (2010) there has been a reasonable constant supply of 2 bed dwellings being brought forward as part of new developments (NEEAP Interim Planning Doc, 2012/SHMA, 2010). However, the SHMA (2010) notes the need for larger dwellings, particularly 3 bed housing. The target mix of housing set out in the SHMA are: 1 and 2 bed flats (20%), 2 bed houses (15%), 3 bed houses (45%) and 4 bed + (20%). However, as mentioned above consultation with local agents has revealed that high demand is expected across all unit types/sizes (AVL, 2013).

6.3.53 The housing stock in Enfield is mixed and is mostly Edwardian, Victorian, 1930's semis, high rise blocks and modern apartment buildings. The quality of the stock is variable and in particular the social/affordable accommodation is in need of investment, with a notable under investment in housing in NEE, there are also housing pressures in terms of the number of non 'decent homes' in the area and issues of overcrowding in the Borough (NEEAP Baseline, 2007/SHMA, 2010).

6.3.54 The density of residential development proposals should balance the need to ensure the most efficient use of land whilst respecting the quality and character of existing neighbourhoods and accessibility to transport and other infrastructure (Core Strategy, 2011). There is also an emphasis on providing a mix if unit types, in particular family homes. Ponders End is considered suitable for residential development and is noted as the key area of housing supply along with the Upper Lee Valley (NEEAP Interim 2012/Core Strategy, 2011).

6.3.55 The Alma Estate (to the west of Ponders End Station) is presently undergoing regeneration, with a phased scheme for 800 new homes, 8,000 sqft of retail, a gym and a health centre being delivered by Countryside Properties. The new residential units are to be of mixed tenure, with 41% affordable and the rest available to the market. Of the affordable properties there is a mix of social rented and intermediate housing. The house types are mixed between; flats, maisonettes and mews. 400 homes are also due to be developed at the Middlesex University site also in Ponders End.

6.3.56 The development and redevelopment of homes at these sites, and the regeneration initiatives occurring within Ponders End and the wider Lee Valley corridor are likely to impact positively upon the desirability of the location, thus potentially resulting in increasing residential property values in the area. Consultation with Countryside Properties has confirmed that the regeneration efforts, including £1m investment into the Ponders End recreational area and other regeneration interventions such as housing and retail renewal, and the potential transport/rail improvements are perceived to be improving the prospects of the area, particularly in Ponders Ends/Southern Brimsdown which are at present subject to less positive perceptions.

Residential Values

6.3.57 Enfield has a lower value property market than other north London Boroughs; we have tabulated below a comparison of Enfield Borough with other north London Boroughs to illustrate the value differentials. The orange line represents Enfield whereas the green line represents the comparator location. As can be seen Enfield has lower than average values, presenting an opportunity for improvement.

6.3.58 Within Enfield Borough, NEE is relatively low value area. Within NEE, lower values are concentrated around Ponders End and Enfield Lock. NEE has some of the lowest value property market areas in Enfield as a whole, and is where social housing provision within Enfield Borough is concentrated. It also has a high level of private rented properties relative to the rest of the Borough. A comparison of values in NEE (EN3), to Enfield and the England and Wales averages are given in the table below.

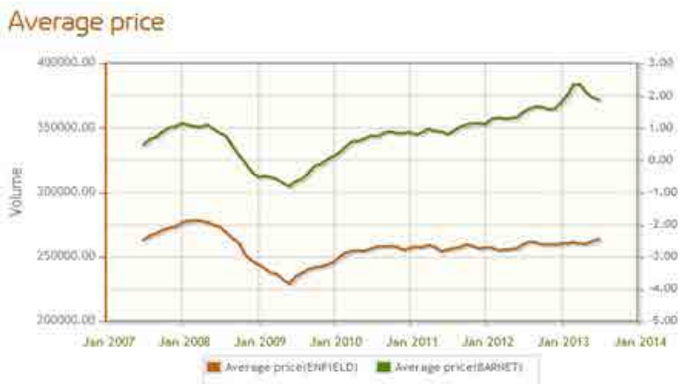
6.3.59 The values associated with new developments are however likely to be higher than the above values, as these include both newer and older properties. The CIL values below will reflect the average values that can be achieved for a residential units within this area. Value level 2 is applied to EN3 postcodes (NEE). The unit sizes applied are taken from the CIL (detailed below). As noted above, regeneration efforts and expected transport improvements (e.g. 4 tracking of the railway line) are likely to place upwards pressure on values.

Affordable Housing Requirements

6.3.60 There is high demand for social rented properties, especially family sized housing. There is a need for 2 bed dwellings, followed by 3 bed, then 1, then 4 or more (NEEAP Interim, 2012). The affordable housing target set out is 40% on sites of 10 or more dwellings, with 70% social rented/ affordable and 30% intermediate (Core Strategy, 2011). No transfer values were available.

Retailing/Leisure in North East Enfield

6.3.61 In the study area retailing is predominantly situated along the principal arterial routes, particularly the A1010, and is thus essentially linear in nature. NEE has three main local centres, Enfield Highway, Enfield Wash and Ponders End. The busy nature of the Hertford Road impacts upon the coherence of the centres, pedestrian movement is impeded and most of the local centres lack parking all of which affect accessibility and desirability. The centres in NEE share a number similarities in that they are within densely populated areas with limited quality 'retail household names'.



No of beds	EN3	EN	National
1 Bed	£119,213	£153,429	£131,082
2 Bed	£215,995	£291, 987	£150,961
3 Bed	£274,482	£394,423	£213,523
4 Bed	£328 ,568	£648,111	£384,936
5+ Bed	£387,657	£1,157,2013	£697,229

Table 6.8: Average Current Asking Value (Zoopla, 2013)

Type	Unit size (sq m)	
	Private (market)	Affordable
1 Bed Flat	50	50
2 Bed Flat	70	70
2 Bed House	83	83
3 Bed House	96	96
4 Bed House	125	110

Table 6.9: Enfield Residential Unit Sizes

Figure 6.9: Enfield Average Values Comparison (Land Registry, 2013)

	LB Enfield new build housing values assumptions - values range						
Value Level (VL)	1 Bed Flats	2 Bed Flats	2 Bed Houses	3 Bed Houses	4 Bed Houses	£/sqm guide	£/sqft guide
1	£120,000	£168,000	£199,200	£230,400	£300,000	£2,400	£223
2	£140,000	£196,000	£232,400	£268,800	£350,000	£2,800	£260
3	£160,000	£224,000	£265,600	£307,200	£400,000	£3,200	£297
4	£180,000	£252,000	£298,800	£345,600	£450,000	£3,600	£334
5	£200,000	£280,000	£332,000	£384,000	£500,000	£4,000	£372
6	£220,000	£308,000	£365,200	£422,400	£550,000	£4,400	£409
7	£240,000	£336,000	£398,400	£460,800	£600,000	£4,800	£446

Table 6.10: Enfield Property Values (CIL Viability Study, 2013)

6.3.62 Retailing in the NEE area is generally characterised by small unit shops serving local needs, occupied primarily by smaller independent businesses and some national multiples. The general retailing quality in the study area is poor. All three retailing centres within NEE are classified as Large Local Centres within the Core Strategy (2010). The Core Strategy (Core Policy 17) states that Enfield's Local Centres will continue to be supported in providing core local shopping facilities and services (such as convenience store, post office, pharmacy and newsagent) for their respective local communities; largely catering for a catchment area within walking distance.

6.3.63 Consultation with the Enfield Business and Retailers Association (EBRA) has confirmed that there may be potential for improving the local retail offer. The majority of provision is by small family operated retailers; however it is believed that some recognised brands and high quality stores may be desirable in the area as this would help improve the retail offer. The area with greatest potential for such improvements is at Ponders End, where the significant increases in population, redevelopment of the Alma Estate, proximity to schools, the college, and transport links create greatest footfall and demand for greater retail provision.

6.3.64 At present the local centres have a role in servicing the local population with convenience stores and small local services; comparison retail on the whole is concentrated in the higher order centres such as Enfield Town and Edmonton Green (following the town hierarchies).

6.3.65 Comparison retailing is expected to grow within Enfield Borough (Retail Study Update, 2009); however any expansion is likely to be concentrated in the dominant centres and at locations such as the Palace Xchange in Enfield Town centres or Edmonton Green both of which have an established retail offer or outside the borough in places such as Waltham Cross.

6.3.66 At Waltham Cross there are presently aspirations to redevelop the Northern part of the High Street, this redevelopment is likely to include a 3,500 sqm (38,000 sqft) Sainsbury's as well as an improved comparison shopping offer (Waltham Cross Draft Town Centre Strategy, 2013). Given the convenience offer that is proposed as part of this development there is likely to be some impact on the local centres; with potential trade diverted form Tesco at Ponders End and Coop at Freezywater to the new Sainsburys store.

6.3.67 BRA and Enfield Council have raised concerns that the development is likely to impact on retailing in NEE, in particular the convenience offer. The Waltham Cross development will offer larger format stores, household names, and comparison retailers which will attract residents of NEE.

6.3.68 Retailers are normally attracted to established shopping locations with good levels of expenditure. The potential to compete with the comparison retail offer at more established locations is thus unlikely unless a significant mass of units could be delivered to establish a retail destination, which is unlikely in the AAP area. Such an aspiration is however hindered by the levels of local spend, which in the short-medium terms is likely to be low relative to other more prosperous areas. As mentioned above retail provision that services local need is likely to be suited to the area, such as children's clothing provision, convenience and local services.

6.3.69 The spending power in NEE is low due to areas concentration of economic/ income deprivation which is weakening the sustainability of the local retail sector (NEEAP Interim Direction Document, 2012). There are higher level of households in the NEE area with total incomes of less than £5,000 per year than in the rest of the borough (Baseline Report, 2007). Between 16% and 17% of adults in employment in Enfield are paid less than £7.50 per hour (London's Poverty Profile, 2009). The current retail offer very much caters for the spending power and demographics of the area.

6.3.70 Convenience retail demand is forecast to be limited (Retail Study Update, 2009), however with further residential development the need for local convenience retailing may increase. However it is likely that only local convenience and local comparison retailing will be suited to the area, servicing the needs of the local population. Large scale/high value units are not likely to be suited to the area. This is mirrored in the leisure provision, which will be predominantly to service the local population.

6.3.71 We have undertaken an initial search of current requirements in Enfield. The table below details requirements found (Estates Gazette, 2013). It must be noted that it is not possible to search for NEE only, thus some of the below requirements may have limited interest; however we consider that these are the type of operators who may be interested in taking space within the local centres.

3.71 Should development come forward – such as developments at the Meridian Waterfront, or any other large scale development such as the Alma Estate scheme (residential or commercial) which improves the desirability and values in the site area, then the attractiveness of the area for retail occupiers may increase.

3.72 At present there is limited availability of retail/ leisure space, with only 4 units advertised in EN3. Deals for retail take-up are also very limited with only 24 transactions listed between September 2007 and September 2013, which demonstrates a small or a closed (in that many of the deals may have not have been reported, as a number of units are likely to be family run businesses which tend to exchange on an off market basis) retail market in NEE (EGi Database, 2013).

Operator Name	Activity	Min Sales (Sqft)	Mas Sales (Sqft)
99p Store	Department Store	465	929
Albermarle Bond	High Street Pawnbrokers	46	116
Aldi	Food	3,237	16,187
ASDA	Food	16,187	32,374
B&M Bargains	Department Store	929	2,787
Carphone Warehouse	Electrical Goods	139	N/A
Costa Coffee	Restaurants, Bars & Cafes	1,214	2,023
Cost Cutter	Food	93	325
The Gym	Services – Leisure	1,301	1,858
JD Wetherspoon	Restaurants, Bars & Cafes	4,181	N/A
Morrisons	Food	1,394	6,968
One Stop	CTN	186	279
Paddy Power Plc	Services – Retailing	70	186
Poundland	Department Store	465	929
Subway	Restaurants, Bars & Cafes	23	111
Timpson	Retailing	19	37
WHSmith	Books, Music & Video	111	232
Wine Rack	CTN	139	232

Table 6.10: Enfield Retail Requirements (EGI, 2013)

3.73 In terms of retail development coming forward within NEE, we understand that 8,000 sqft of retail accommodation is being provided by Countryside Properties in the Alma Estate regeneration scheme. However, the new retail provision at the Alma Estate will in fact be replacing the existing retail units which will be demolished as part of the scheme, and therefore the current tenants will have the right to take space in the new scheme if they wish to do so. Countryside properties has confirmed that retail offer will be predominantly focused on servicing local needs and that should the current tenants not renew their leases the units will be made available to the wider retail market. It is recognised that although retail improvement would be desirable, it is likely that this provision will have a local focus, providing for local needs (EBRA/Countryside Properties).

Retail/Leisure Values

6.3.72 The average psf value of the deals undertaken over the 2007 – 2013 period is £27; this is however skewed by 2 high value deals at £41.29 psf and £79.17 psf. The first relates to a 581 sqft retail unit on Hertford Rd (no 557) and the latter a restaurant unit at Enfield town station, Southbury Road for a 60 sqft unit. The small size of the latter is thus likely to account for the high value. On the whole units averaged £16 - £18 excluding anomalies. The retail and leisure units are likely to have similar values in this area.

6.3.73 Yields for good secondary high street retail are expected to be around 7.25%, whereas more average secondary units are expected to achieve in the region of 11% yields (Secondary Commercial Yields Knight Frank, 2013). Yields applied to all commercial property in the recent CIL viability study (2013) are 6 and 7%.

Retail Warehousing

6.3.74 In terms of retail warehousing there are two retail parks in the NEE area, Enfield Retail Park and De Mandeville Retail Park.

6.3.75 Enfield Retail Park provides 151,737 sqft of space with current tenants including; Pets at Home, Halfords, Sports Direct, Currys, Boots, Costa and Toys R Us, and Kiddicare. The scheme opened in 1994 and has recently been refurbished; this included new cladding, entrance features and improved signage.

6.3.76 At present there are 5 units available – two at approximately 15,000 sqft, one at 3,000 sqft and another two at approximately 1,200 sqft. The smaller units are pod style units that are likely to be taken up by A3 occupiers, for example, occupiers such as Costa Coffee who already occupy one of these smaller units on the park. Consultation with Cushman Wakefield has confirmed that all of these units are under offer. The consultation has also revealed that there is some demand from retail warehouse occupiers; predominantly in the 7,500 – 10,000 sqft categories; however land restrictions and the inability for the retail park to expand negate the potential to accommodate this demand.

6.3.77 The De Mandeville Retail Park on the Southerby Road opened in 1995 and was extended in 2011, providing a total of 70,245 sqft in 4 units, occupied by Argos, Harveys, Currys/Pc World and Oak Furniture Outlet.

6.3.78 From our own review of retailer requirements (EGi Database), we are aware that retailers such as Next, Sports Direct and B&M Bargains are looking for space in the borough and are the type of retailers who tend to consider retail warehouses/parks

6.4 Conclusions

6.4.1 In this section the findings from the analyses undertaken in the earlier sections are drawn together.

Office (B1)

6.4.2 The office market in NEE is small compared to nearby City Fringe locations. There are a limited number of large offices available, with the majority of units available being sub 25,000 sqft. Similarly, there is a distinct lack of offices below 1,000 sqft; most offices available are between 1,001 – 10,000 sqft. B1 units between 1,001 and 2,500 sqft were in highest demand over the period November 2007 – November 2013. The majority of stock is second-hand; and the level of new build stock is very limited. There is very limited demand for traditional office space within NEE.

6.4.3 **Opportunities:** Enfield has a high number of small businesses, and as identified in the Employment Land Review (2012) there may be scope for a micro-business hub to cater for this demand. At present the Wenta Business Centre is the only space offering incubation services and small serviced units. A micro-businesses hub/shared space and small offices/workshops between 150 and 1,500 sqft are most likely to be in demand within NEE.

6.4.4 Managed workspace providing smaller units that are suited to B1 (c) (sub 2,500 sqft) may also be suitable as part of mixed use developments as they are relative compatible with residential uses. It may also be appropriate to consider the potential sub-division of some of the exiting office stock that is currently on the market to meet the needs of SMEs in the borough.

Industrial/Distribution (B2/B8)

6.4.5 In terms of the B2/B8 market analysis, it is clear that the market for these uses is much greater than the office market, particularly in terms of warehousing and distribution given NEE's strategic location, thus meeting both local and strategic demand. The industrial estates tend to be popular, providing vital employment/industrial land to service the greater London area. However, we aware through consultations with local businesses that congestion is seen as a key issue that is starting to affect the attractiveness of the industrial estates to potential occupiers. The key conclusions are as follows:

- 70% of transactions that took place over the period November 2007 – November 2013 were for industrial property on the Brimsdown Estate. Most of the B2/B8 property in North East Enfield can be found on this estate.
- There is a significant supply of industrial space (1,290,223 over 40units) in the area.
- The industrial unit sizes in highest demand are between 2,501 and 10,000 sqft; 59% (48 units) of transactions were for units of this size.

- The unit sizes with the highest rents are those sized under 1,000 sqft. The lowest rents are for units sized between 2,501 and 5,000 sqft which could explain their popularity with occupiers.
- This area is likely to remain popular for industrial occupiers due to low rents; however as mentioned above we are aware that there are issues with congestion in the NEE area.

6.4.6 **Opportunities:** There is a high level of flexibility in terms of industrial accommodation, with many occupiers utilising industrial space for non-traditional uses. With this in mind, and the high levels of demand established for sub 5,000 sqft industrial units (from the services industries) such space is likely to be very appealing to the market (so long as it is reasonably priced (£8-9 psf approximately). There is also demand for larger distribution space; however, this will require the redevelopment of parts of the existing (older/obsolete) stock in order to meet these requirements.

6.4.7 North East Enfield is a healthy industrial area and should continue to be promoted for employment uses. There is opportunity for redevelopment when older buildings become obsolete; depending on the number of units/land available for redevelopment, B8 warehouse and/or B2 units can be brought for development.

Residential

6.4.8 At present the area is characterised by a low value property market with high levels of social housing and private rented properties relative to the wider Enfield Borough. A high level of demand for all house types and tenures has however been noted.

6.4.9 **Opportunities:** All housing unit types are likely to be in demand and improvements in the wider area and regeneration schemes/projects coming forward (e.g. Alma Estate and Ponders End Recreational Area) are likely to positively impact on desirability and thus values in the area. Improvements in transport links will encourage further interest in the area for commuters and purchasers. The West Anglia Mainline Enhancement Project will improve the attractiveness of NEE as a residential area by improving the frequency of trains into Central London. Recent research undertaken on the impact of the current Crossrail on residential property prices in Outer London are set to rise by approximately 33% by the end of 2018, should they be located within a Crossrail Station 'walkzone' (within a 15 minute walk to a Station) . It is estimated that for every 250m distance from the station entrance, there will be a decrease in prices or impact of 1.9% of the additional property value increase .

6.4.10 Although, some way in the future, Crossrail 2, will also help to improve connectivity with Central London and although we understand that there isn't a Crossrail station proposed for the NEE area, the improved connectivity in the wider area will help to increase the desirability of the area as an affordable residential location compared to more inner London boroughs.

Retail/Leisure

6.4.11 At present the retail/leisure offer is limited and concentrated along the A1010 in the Enfield Wash, Enfield Lock and Ponders End. The retail and leisure provision is primarily small scale in nature servicing local need.

6.4.12 **Opportunities:** Similar to the above opportunities in respect to residential, further regeneration in the area may result in greater demand from occupiers due to the increased spend capacity that new developments may bring. The capacity to attract greater spend for comparison and convenience retail is likely to be limited to the local area although specific sites opportunities may exist to attract wider interest from a slightly wider catchment area. In terms of retail warehousing there are known occupier requirements in the area, however the accommodation needs cannot be fulfilled.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7

Socio-Economic Review

7.1 Introduction

7.1.1 This review provides:

- An update on the socio-economic baseline of North East Enfield since the time of the Interim Direction Statement (August 2012); and
- A snapshot of possible future socio-economic profile of the area to inform the emerging North East Enfield Action Plan (NEEAP)

7.1.2 The socio-economic baseline has been updated using latest Borough level demographic and employment data. We have also drawn on qualitative evidence from the outcomes of interviews from those knowledgeable in the area in respect of the current provision of local community facilities such as child care, education and employment.

7.1.3 Finally, we summarise the issues and opportunities for the future that will provide an evidence base for the NEEAP.

7.2 Review and update of current situation

Enfield Borough Profile

7.2.1 According to the Greater London Authority (GLA) mid-2013 trend based population projections, Enfield's population was reported to be around 322,426 persons. This is an increase of 13% compared to 2003, which is in line with the rise in London's population during the period.

7.2.2 The wards in the North East Enfield Area (NEEA) comprising Enfield Lock, Enfield Highway, Ponders End, Southbury and Turkey Street, make up about 25% of the population of Enfield. According to the Census, NEEA had an estimated population of around 77,000 in 2011. This represents an increase of about 19% compared to 2001.

7.2.3 Enfield is ranked the 64th most deprived local authority district in England (out of 326)[7]. Within the Borough, NEEA has some of the most deprived areas, as shown in Figure 7.1 opposite. Much of NEEA ranks within top 20% of the most deprived areas.

7.2.4 Enfield has one of the smallest proportions of residents of working age in London. Figure 7.2 shows that Enfield about 64% of Enfield's residents of the usual working age (16-64), according to the latest GLA estimate, which is the fifth smallest in London at Borough level. The figure for NEEA is in line with the Borough percentage.

7.2.5 Enfield's employment rate of about 65% is below that of London as a whole (about 70%)[8].

7.2.6 NEE has a relatively younger population compared to the rest of the Borough and London has a whole. Over a quarter of NEAA's population are children aged 0-15. This is above the Borough average (22%) and the London average (20%). The proportion of residents above the age of 64 is only about 10% which is slightly below the Borough (12%) and London (11%) percentages.

7.2.7 Migrants continue to make up a large proportion (32%) of Enfield's population (Source: ONS, 2012). According to the latest estimates from the GLA, the Borough has the largest percentage of residents of Turkish origin (7.0%) in London. Within NEEA the largest proportion of ethnic groups include White British, White other, Black Caribbean and Black African.

7.2.8 The GLA population estimates also show that about 22% of Enfield's population are below working age (i.e. aged 0-15), which the fourth highest percentage in London. About 45% of children in the Borough do not consider English as their first language[9] which is above average for London, almost three times the national figure.

7.2.9 The occupation profile of the Borough is mainly of a mid to low level skills set. About 80% of Enfield's working age population are in the lowest three "approximate social grades."[10] This is above the London percentage (70%).

7.2.10 NEE has a relatively high proportion in the lowest social grade, of nearly 40%, almost twice the London average. Whereas about 12% of NEEA working age residents are in the highest approximate social grade[11]. This is less than half of the London average.

7.2.11 Enfield has a high percentage of public sector employment. About a quarter of the working population work in this sector[12] which is above the London average (19%). Average earnings[13] in the Borough rank one of the lowest in London with gross pay of around £29,600.

7.2.12 Unemployment in Enfield continues to be above the London average. According to the latest claimant count statistics[14] the unemployment rate was about 3.7% of the resident population in December 2013. This is above the London (3.0%) and National percentages (2.9%).

7 Index of Multiple Deprivation (IMD), Office for National Statistics (2014).

8 Source: Annual Population Survey.

9 Source: DfE, 2013.

10 The lowest approximate social grades are C1 (Supervisory, junior managerial, administrative), C2 (Skilled manual occupations), and DE (Semi-skilled, unskilled manual and unemployed.

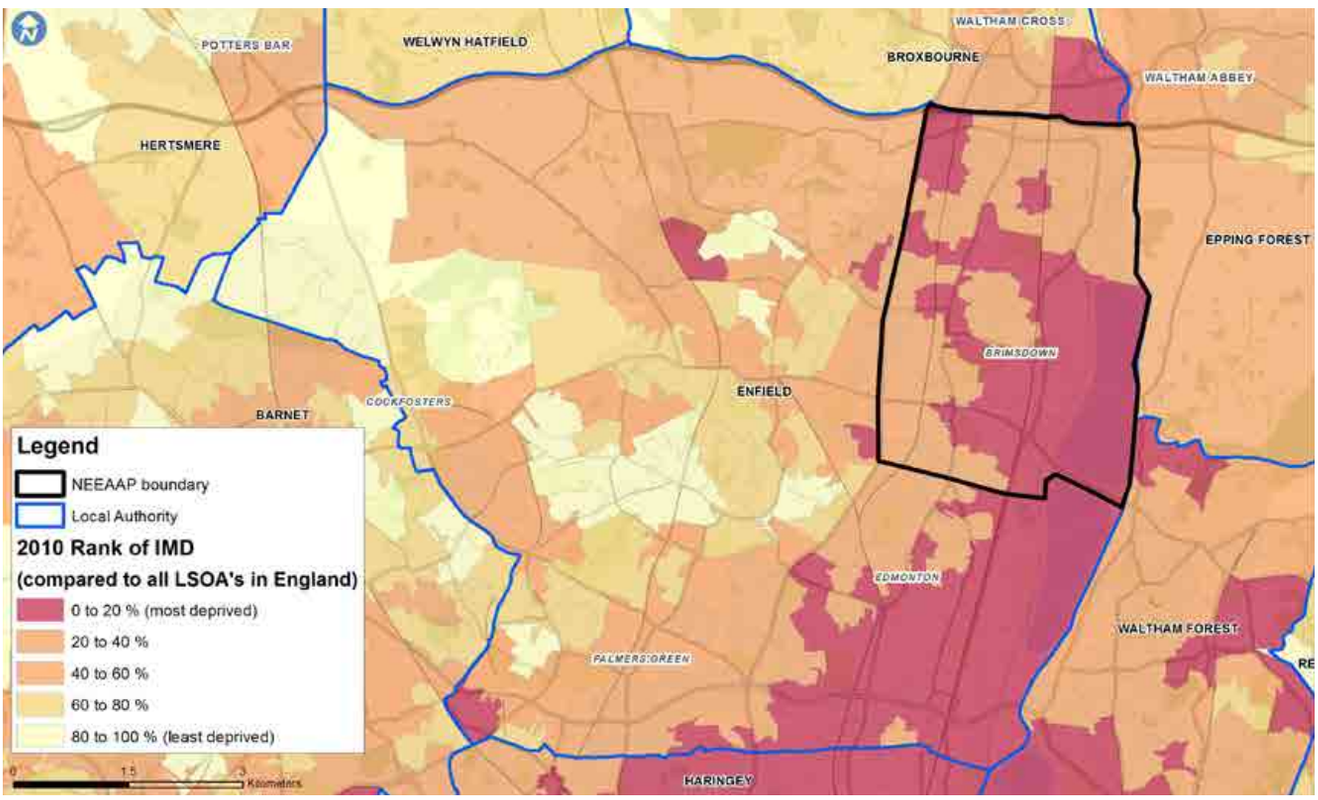
11 The highest approximate social grade is AB ((Higher and Intermediate managerial and professional occupations).

12 Source: Business Register and Employment Survey, ONS, 2013.

13 Source: Annual Survey of Hours and Earnings, ONS, 2013.

14 Source: Nomis, ONS, 2014.

FIGURE 7.1: INDEX OF DEPRIVATION, ENFIELD



NEEA Update

7.2.13 This part considers a number of relevant local issues in the NEEA and comprising existing and predicted future effects in NEEA in relation to:

- employment land;
- early years and childcare provision;
- primary and secondary education;
- college education; and
- NEE Employment and Skills Strategy

7.2.14 To assess these issues PBA completed an Employment Land Review (ELR); utilised our familiarisation of the NEEA; and relied on the findings of Enfield Council's Joint Strategic Needs Assessment (JSNA) and the outcomes of rolling interviews with those knowledge of the area with regards to the provision local facilities.

Employment Land

7.2.15 PBA has recently completed a review of Enfield's employment land and drafted an industrial estates strategy. The key findings from the review are summarised as follows:

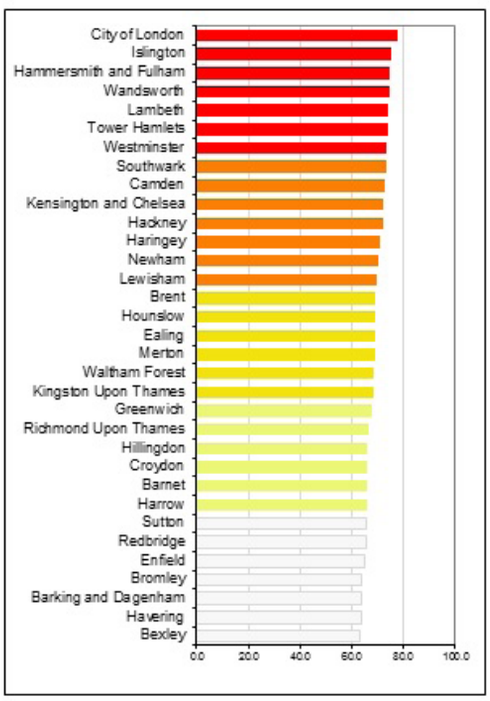
- The Core Strategy and Local Economic Assessment have both noted the critical role of the Borough's industrial estates in delivering prosperity for Enfield.
- The ELR published in 2012 concluded that Enfield was an industrial Borough by London standards, with industrial and warehousing employment accounting for around a fifth of all jobs in the Borough. It noted that within the industrial sector Enfield had already seen a shift from manufacturing to logistics type activity and that there was potential further growth to be had from attracting the green and carbon reduction sector as well as parts of the construction sector.
- Growth prospects are improving for the national economy with London in particularly remaining strong; and
- The implications are continued demand pressure for industrial stock in Enfield.

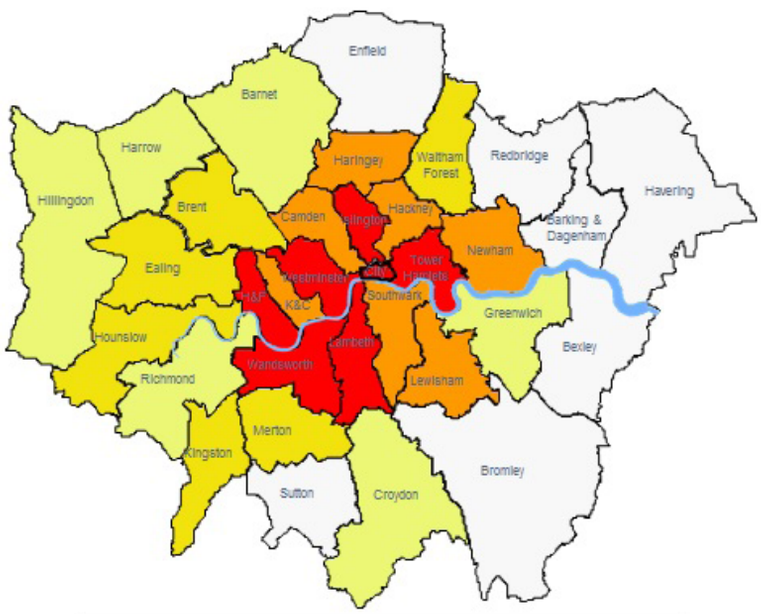
7.2.16 Of these nine sectors there are four which occupy predominantly industrial land which are:

- wholesale and logistics;
- manufacturing;
- construction; and
- green and carbon reduction sector.

7.2.17 The ELR then provided a view on each of the above sectors following the outcome of consultations with key stakeholders. For completeness this is provided again, in the paragraphs below:

FIGURE 7.2: PERCENTAGE OF RESIDENTS OF WORKING AGE (16-64) IN LONDON BY BOROUGH





Legend		Range		Occurrances
Quintile	Colour	Low	High	(equal count)
1		63.5	65.8	7
2		65.8	68.3	6
3		68.3	69.8	6
4		69.8	73.8	7
5		73.8	77.8	7

7.2.18 **Wholesale and Logistics.** Consultation responses to LB Enfield's ELR show a strong trend in logistics and warehousing occupiers citing location as a key factor in market demand for employment space, and in particular the ELR identified high occupier demand and very low vacancy rates for employment space. As an example, demand for warehouse sites along the A1055 corridor currently significantly outstrips supply. This is compounded by the fact that much of this demand is from national occupiers and flows from a strategic requirement for good access to the M25 and the Midlands as well as to Central London. The Upper Lee Valley (ULV) is one of only a few locations in London where these requirements can be met. In addition smaller employment locations continue to be lost in the Central London Boroughs, leading to an out-migration of these occupiers to outlying London areas such as the ULV. Further, agents report that there are a number of existing occupiers seeking premises or land for expansion within the limited level of stock in the area, putting additional pressure on demand.

7.2.19 In terms of supply there is currently a restricted supply of land for new warehousing in Enfield as well as, to a lesser extent, across the other Boroughs of the ULV. Up until now growth has been facilitated by a limited number of new development sites being brought forward (especially in the north of Enfield), but mostly through the recycling of land and premises from manufacturing.

7.2.20 Traditional logistics activity of supplying stores is increasingly supplemented by direct supplies to consumers. UK internet retail sales have increased at a rapid pace in recent years. The increase in e-retail is due to lower prices than those in stores and shoppers are able to search out bargains including second-hand goods. At the same time, the internet is becoming more complex and competitive, and retailers must adapt to this retailing climate. The growth of Marketplace websites is changing the dynamics of the market and further intensifying competition. While unfavourable economic conditions are forcing retailers to scale back on physical retail space, their online operations allow them to reach a much wider customer base.

7.2.21 There has also been recent growth in the 'Click & Collect' method of online shopping – whereby a customer orders and pays for the desired product online, and then collects it from the nearest large branch of the retailer. This approach is currently being rolled out by retailers including Tesco, Sainsbury's, Asda, Next, House of Fraser and John Lewis, amongst others.

7.2.22 The growing number of high street clothing and footwear retailers, who have established an online presence, are likely to continue to benefit from broadening their offers to rival both the depth and breadth of those in store. There is evidence to suggest that the online clothing sector remains buoyant despite the economic downturn; online clothing sales grew 40.5 per cent in the year to December 2010, although this level of growth was not matched in 2011.

7.2.23 In January 2012 the Interactive Media in Retail Group (IMRG) revealed that customers in the UK spent £68bn online during 2011, increased from £59bn in 2010 – a 16 per cent increase. The IMRG forecasts that the online sector will grow by a further 13 per cent during 2012 to £77bn. IMRG estimate that in total internet sales account 17 per cent of the UK retail market. The increase in mobile and tablet-based online shopping is understood to be fuelling the current increases in online spending.

7.2.24 **Manufacturing.** Traditional manufacturing activity in London has been declining for many years. There are now very few primary production activities that take place in the capital. There is some legacy activity that remains for historic reasons but most has closed or relocated. What remains tends to be here for specific reasons. Either because its needs to be close to the market it serves or because it is high value low volume activity which relies on specialist labour market inputs. The fresh food manufacturing sector is an example of the former and is a sector that is well represented in Enfield. Given the population growth outlined above there is every reason to expect continued demand for such activity.

7.2.25 The sector will be a continued source of jobs for the Borough and the Enfield LEA notes that Southgate College and CHENEL deliver training for the food manufacturing sector. The Food and Drink sector generally attracts lower skilled workers. There will still be a requirement for those qualified to Level 2 and employers will need to train these staff up to comply with health and hygiene legislation. There may also be increased demand for technical (including lean manufacturing and process improvement), practical or job-specific skills, followed by ICT and management skills.

7.2.26 Other forms of manufacturing activity that thrive in London are those related to creative industries and bespoke high value activity such as fashion. But with the advance of new technologies such as additive manufacturing there is likely to be growth in bespoke consumer products that have the characteristics of such high end sectors and require locations close to their customer base in order to quickly supply bespoke individual products.

7.2.27 **Construction.** The construction industry has suffered more than most sectors as a result of the recession. But the sector is by nature pro-cyclical, and so we would anticipate it returning to normal levels in the long term. The GLA's medium term projections see growth in the construction sector, with output projected to grow by 1.5% in 2013, by 3.0% in 2014 and 3.3% in 2015. Employment over these three years is correspondingly projected to grow by 0.6%, 2.8% and 3.4%. In the longer term the GLA project construction employment to be broadly constant. The population and housing growth discussed above seem certain to sustain activity in the sector.

7.2.28 According to BRES data there were 4,800 employees in the construction sector in Enfield of which 1,800 were on sectors that might typically be expected to occupy employment land. It is also a sector that has a high level of self-employed that are not counted in these figures. The LEA notes that the largest businesses in the construction sector are based in Brimsdown and Innova Park.

7.2.29 There are changes to construction methods that are likely to give rise to an increased demand for industrial land from the construction industry sector. New approaches to construction aimed at reducing construction time and hence delivering efficiencies are being applied. The house building sector is seeing increasing application of flat sheet composite structures that are prepared off-site to replace traditional brick built buildings. This both provides opportunities in the manufacture of such pre-fabricated components, but perhaps more importantly for Enfield in the sub-assembly of such components off-site but close to market.

7.2.30 Further trends driving the market include sustainability with an impetus to recycle source materials and reducing carbon emissions which again impacts on the types of building materials used. As the components are large and heavy they incur quite high transportation costs which again adds weight to a location close to market.

7.2.31 Particular opportunities are seen in the retrofit sector which provides some link with the Green and carbon reduction sector discussed below. The pre-fabrication market is another area that is identified in the LEA as having growth potential.

7.2.32 The construction sector provides a particularly good range of job opportunities for local residents. Local colleges are geared up to provide the training with both CHENEL and Southgate College. There will still be demand for Level 2(+) qualified construction and building services workers. There is also increasing demand for Level 3 and 4 skills, particularly in Civil Engineering, as well as specialist training requirements for the installation and maintenance of renewable technologies. There is a need to keep up with changing construction techniques e.g. retrofitting room 'pods' that have been assembled offsite and new eco-construction methods and standards.

7.2.33 **Green & Carbon Reduction sector.** The Green Industries overlap to some extent with the sectors discussed above but will continue to drive demand in the Borough. Collectively they are vital to London and provide a strong rationale for protecting many employment sites. However in property terms many share similar characteristics to manufacturing or warehousing units. This is especially the case as the sector becomes increasingly high tech.

7.2.34 The London Waste EcoPark and Mega Materials Recycling Facility (MRF) in Edmonton are examples of major assets of this sector in the Upper Lee Valley. Renewable energy such as biomass and photovoltaic, and other growing low carbon sectors such as alternative fuels, energy management and low carbon vehicles are also important growth sectors, within the Upper Lee Valley in particular. Waste management, recycling and recovery; underpin the major contribution the sub-region makes to resource management at a London level.

7.2.35 A report by Innovas on the Low Carbon Environmental Goods and Services (LCEGS) sector noted a number of sub sectors where there are major opportunities within the London market place. These were identified as: Low carbon transport; Recovery and recycling; Renewable energies; Decentralised energy; Building technologies and Carbon finance.

7.2.36 Enfield is ranked 13th of all London Boroughs in terms of size of the LCEGS market with a 2009/10 market value of £435m. There were an estimated 3,500 workers employed in the sector in Enfield and a total of 190 companies operating in the sectors. In terms of the Environmental sub-sector Enfield was ranked 3rd in terms of Recovery and Recycling. In terms of the Renewable energy sub-sector it was ranked 5th for Wind.

7.2.37 LCEGS is a wide ranging sector, which cross cuts with other sectors. The more specialised Renewable Energy and Energy Efficiency jobs require Level 4 and 5 qualified specialists, particularly in STEM subjects. There is a need to train Construction and Building Services workers in spec ialist skills (Level 3) associated with the installation and maintenance of Renewable Technologies and the incorporation of Energy Efficiency devices and design into new buildings. The green and carbon reduction industry is a growth sector that will provide good employment opportunities and the Council and its partners has recently started work around the green cluster and specifically with accrediting insulation installers.

7.2.38 Enfield is best placed take up opportunities to drive growth in these sectors as it part of the London-Stansted-Cambridge-Corridor, a £161 billion, 296,000 firm economy built on the high-tech, clean, green, and knowledge economy. The corridor brings s together excellent connections to London, Cambridge and Europe, a variety of sites and premises, and a productive population with a diverse range of skills.

7.2.39 The Corridor has a rate of Gross Value Added per head (productivity) higher than the UK and South East average. It contributed about 12% of UK GVA[15] in 2011. With a range of high profile businesses already located in the region, the area is an attractive investment location. It is an area highly concentrated in skilled jobs as it home to around 21.8% of UK media professionals and 1.4 million people educated to degree level and above;

7.2.40 To this end, it crucial that Enfield's infrastructure improvements continue to result in greater connectivity to access the corridor (Core Policy 14) as it offers a fertile ground for labour market and business specialisation. Access to highly skilled jobs is key component of Enfield's Employment and Skills Strategy (see below) and better integration of Enfield's industrial sites with the corridor will increase the attractiveness of the area for inward investment.

15 Source: Enfield Essex Hertfordshire Border Liaison Group, 2013.

Child Poverty

7.2.41 In 2012 the proportion of Enfield's children living in poverty[16] was about 29%. Approximately 18,609 of Enfield's pupils qualify for pupil premium based on their level of deprivation, which is nearly 40% of the pupil population. This is well above the London average and is the 16th highest in London out of the 32 London Boroughs. About 27% of all primary school pupils in the Borough qualify for Free School Meals as do about 26% of secondary school pupils.

7.2.42 In general, child poverty is high in the East of the Borough. Child poverty in NEEA's wards is above the Borough average as summarised in the Table 7.1 below. Enfield Lock and Ponders End have the highest percentages of child poverty in the Borough.

NEEA Ward	Percentage of children in poverty
Enfield Highway	37%
Enfield Lock	41%
Ponders End	41%
Southbury	33%
Turkey Street	39%

Table 7.1: Child Poverty in NEEA by Ward (Source: End Poverty, 2013)

7.2.43 Enfield's Child and Poverty Strategy[17] makes it clear that the current position must be addressed. Enfield Council aims to reduce Child Poverty by 25% by 2020. The strategy sets out a need to:

- promote a shared understanding of characteristics of child and family poverty, its consequences;
- adopt an early intervention approach;
- conduct a detailed audit of current interventions and impact looking at gaps and overall effectiveness;
- ensure that there is a clear understanding across all stakeholders of the impact of current and future welfare changes on residents including part-time workers;
- identify those proposed additional interventions that will make the most difference looking at mechanisms, target groups (may be geographical), methodology for measuring impact and funding;
- align and build on existing initiatives wherever possible to focus the impact and avoid duplication;
- set up one or more pilots that, if successful can be used as a template across the borough; and
- allocate council and partner responsibilities (including financial and other resources) not forgetting that Enfield's families are the most important bastion against child poverty and its possible impact on child outcomes.

7.2.44 According to HM Revenue & Customs (HMRC), the majority of NEEA's children in families that are in receipt of Child Tax Credit (CTC) are from lone parent families as shown in Table 7.2 below.

NEEA Ward	No. of Children in families in receipt of CTC	
	Couples	Lone Parents
Enfield Highway	280	1,360
Enfield Lock	310	1,575
Ponders End	355	1,200
Southbury	215	1,030
Turkey Street	290	1,270

Table 7.2: Child Poverty by family type (Source: Child Tax Statistics, HMRC 2013)

7.2.45 The majority of families in receipt of CTC in NEEA have a child aged 0-4 as shown in Table 7.3 below. Enfield Council has adopted an "early intervention" approach in order to tackle the issue of child poverty and maximise the impact of efforts and resources. Part of this strategy is the provision of Early Years Foundation Stage (EYFS) explained in the following section.

NEEA Ward	Total number of children where the youngest child is aged:			
	0 - 4	5 - 10	11 - 15	16 - 19
Enfield Highway	1,025	650	250	80
Enfield Lock	1,270	660	260	90
Ponders End	1,105	545	250	90
Southbury	850	475	195	65
Turkey Street	985	570	250	90

Table 7.3: Age profile of children in families in receipt of CTC (Source: Child Tax Statistics, HMRC 2013)

Early Years Provision

7.2.46 Every 3 or 4 year old is entitled to 15 hours per week of free Early Years Foundation Stage (EYFS) provision from the beginning of the school term following their 3rd birthday until compulsory school age.

7.2.47 All early years providers, whether they are child-minders, schools, day nurseries, or preschools, have to meet EYFS requirements - meaning that all children should get the same experience, no matter what environment they are in.

16 Defined as the proportion of children living in families in the receipt of out of work benefits or in receipt of tax credits where their reported income is less than 60 per cent of median income (Source: End Poverty)..

17 The Drive Toward Prosperity – Enfield's Child and Family Poverty Strategy, 2012

7.2.48 Studies show that an effective EYFS provision is essential for reducing levels of child poverty. It has a positive impact on the child's development physically, cognitively and emotionally through a balance of child-initiated play, focused and structured learning prior to attending school

7.2.49 From September 2013 the Government expanded the scheme to offer EYFS places for some 2 year olds in the term following the second birthday. Enfield council provides EYFS places for 2 year olds from 20% of the disadvantaged families[18].

7.2.50 Enfield Council's JSNA noted that the Turkey Street ward had the fewest number of EYFS providers 15. The other words of NEEA have more providers in line with the Borough average of around 24.

7.2.51 Comparing the number of providers with the population of 0-5 year olds in each ward, the JSNA found huge disparity between Enfield's eastern wards and those in the west. A total of nine wards sit above Enfield's average of 58 children per provider, with four of these in the east of the borough.

7.2.52 The average number of children per provider in Enfield Lock, Enfield Highway, Turkey Street and Ponders End are all above the Borough average (58). Enfield Lock, in particular, reported a figure of 110 children per EYFS provider.

7.2.53 OFSTED's grading of the NEEA's provision of EYFS has highlighted room for improvement:

- About 56% of providers (i.e. 18 providers) were considered to be 'Good' or 'Outstanding.' This is below the Borough average of about 71%;
- About 41% of providers (i.e. 13 providers) received a 'Satisfactory/Requires improvement' grading. The majority of these are in the Enfield Lock and Ponders End wards; and
- 1 provider in the Turkey Street ward received an 'Inadequate' rating.

7.2.54 From 2014 Enfield Council are expanding EYFS provision to 40% of the most disadvantaged two-year-olds. For NEEA this will mean that some 2,700 two-year olds will be eligible for EYFS. Trajectory funding has been secured from Central Government in the near term. Based on evidence to date the key issues around the provision of EYFS are:

- The sufficiency of childcare for working parents and measuring the take-up of the scheme;
- Targeting the most vulnerable areas/wards in the Borough

18 Eligibility based on the parents of the two year old being either in receipt of Income Support; Income Based JSA; Employment Support Allowance; Assisted as an Asylum Seeker; Child Tax Credit only, had have an annual income of less than £16,190; or the guaranteed element of State Pension Credit.

Primary and Secondary Education

7.2.55 **Education:** The area is well served at secondary school level, and Enfield College is a major asset to the area. There is unlikely to be a need for additional secondary places before 2018 due to the recent increase in provision from academies in the area. At primary school level, recent increases in academy provision have ensured that the rising demand for places can be met until at least 2018. The projected school-age population statistics and provision of pupil places information are reviewed annually so that any changes can be addressed. If there is a significant school-age population increase during the lifetime of this AAP, the provision of extra capacity at education facilities may be required.

Name	Type
Oasis Academy Hadley (a)	Primary and Secondary
Oasis Academy Enfield (a)	Secondary School
Bishop Stopford's School	Secondary School
Lea Valley High School	Secondary School
Chesterfield School	Primary/Infant School
Brimsdown Primary School	Primary/Infant School
Alma Primary School	Primary/Infant School
Prince of Wales Primary School	Primary/Infant School
St James' C of E Primary School (v)	Primary/Infant School
Keys Meadow School	Primary/Infant School
St Matthew's C of E Primary School (v)	Primary/Infant School
St Mary's Roman Catholic Primary School (v)	Primary/Infant School
Freezywater St George's C of E Primary School (v)	Primary/Infant School
Eastfield Primary School	Primary/Infant School
Southbury Primary School	Primary/Infant School
Suffolks Primary School	Primary/Infant School
Honilands Primary School	Primary/Infant School
Carterhatch Infants & Junior School	Primary/Infant School
Enfield Heights (f)	Primary/Infant School
Aylands (s)	Primary/Infant School
Durants (s)	Primary/Infant School
Waverley (s)	Primary/Infant School
Russet Houses	Primary/Infant School

Table 7.4: NEEA Primary and Secondary Schools.
a – Academy; f – Free school; v- Voluntary aided;; s- Special school maintained by LB Enfield; All other schools listed are maintained by LB Enfield

7.2.57 **Providing for primary school expansion:** Current pupil number projections and capacity in schools indicate that extra primary provision is not required until at least 2018. The Council reviews this position on an annual basis and if the demand for primary places is projected to exceed available capacity in schools options to provide that capacity are investigated. The two main options for increasing capacity are the opening of academies or free schools, over which the Council has little control, or the expansion of existing Council funded schools. If the expansion of a Council school is required then the expansion plans are subject to consultation before final decisions are taken on delivery.

7.2.58 **Providing for secondary school expansion:** Current pupil number projections and capacity in schools indicate that no extra secondary provision is required until 2018. Whilst further places are forecast to be needed for 2018, this could be met by the ARK North Enfield Academy, depending on its final location. Current and future capacity and demand will continue to be reviewed on an annual basis and where necessary the provision of extra capacity will be investigated.

College Education and recreation

7.2.59 The College of Haringey, Enfield and North East London provides further and higher education based over two centres in Tottenham (Tottenham Centre) and North East Enfield (Enfield Centre). The College draws its students from across London, mainly from Haringey, Enfield, and Hackney.

7.2.60 The Enfield Centre is primarily targeted for students looking to pursue further (non-degree level) education, vocational courses, apprenticeships, and low level qualifications (adult literacy, English for Speakers of Other Languages etc, warehousing, logistics, public services). Unique to this part of London, the college boasts one of the largest state-of-the-art construction education centres and also offers railway engineering courses.

7.2.61 The college is a 10 minute walk from Southbury and Brimsdown train stations and also served very well by local buses.

7.2.62 The college provides a number of specialist courses and facilities to accommodate these. It is engaged in a number of partnerships with education providers and businesses including:

- Specialist accommodation for hairdressing and beauty (recently developing a £1m industry standard facility in partnership with a local business);
- Information Technology suites and mentoring facilities (3 state of the art wifi enables classrooms, primarily for ESOL and low level skills courses);
- A travel agency and related travel/tourism courses;
- Media facilities;
- Science laboratories (courses provided to BTEC/HND (National Level);
- A construction facility (dedicated classroom/workshop for apprenticeship courses)
- A sports centre and outdoor space with a playing field for football pitches (Football Academy in partnership with Boreham Wood FC) with and other sports;
- Drama students also have access to the prestigious Chicken Shed Theatre where they can learn in a professional theatre environment.
- Grade 1 Rail Track facilities (for rail engineering courses)
- The building of local schools such as ARK John Keats Academy in 2013 (in partnership with Enfield Council)

7.2.63 Other recent developments include:

- The opening of a new University and Technical College (UTC) in the Borough to help co-ordinate the Science and Technology provision;
- Upgrading of sport facilities such as the sports hall in the college;
- Continued partnership with the Football Academy and other sports to promote the take-up of sports and offer sports-related courses.
- Learning centre (upgrading in parallel with the 800 or so apprenticeships already provided)
- Free school provision – plans on admitting Reception and Year 1 Pupils. In 2014 it is to open to Year 7 students (as outlined above).

7.2.64 The key issues identified by the College are:

- The low take up of courses in warehousing and logistics of residents of Enfield. The College had a 96.6% success rate in finding students of these courses employment, but the main beneficiaries appear to be students from Tottenham.
- Working in collaboration and not in competition with private training providers so as to maintain a minimum standard for specialist courses offered in the borough..

Employment and Skills

7.2.65 As noted above, Enfield's employment rate of 65% is well below the London average. At the same time, the economic activity rate for the Borough is about 73% which is also below the London average of about 77%.

7.2.66 The Interim Direction Statement (August 2012) noted that a key factor affecting the employability of residents in the borough is their low level of skills relative to those in advertised vacancies with only 1 in 12 jobs advertised by Job Centre Plus (JCP) requiring low or no skills.

7.2.67 Access to occupations requiring a relatively high skill set is impeded by a number of factors. One of these-the low skills profile of residents- is particularly apparent in NEEA, where about 44% of usual residents aged 16 or above hold only "Level 1" or "no qualifications"[19]. This is above the Borough average of about 36% and well above the London percentage of 28%[20]. Other issues such as a lack of employability/soft skills, language barriers, and psychological/mind-set factors have meant that a number of residents are excluded such opportunities.

7.2.68 Employment by broad industry sector for NEEA, Enfield and London is shown in the Figure 7.3 opposite. NEEA has a higher proportion of employees working in relatively mid to low value jobs in wholesale and retail trades and human health and social work activities compared to the rest of the Borough and London as a whole.

7.2.69 In contrast, high value employment sectors such as professional, scientific and technical activities only employ less than 5% of NEEA's workforce which is significantly lower than the rest of the borough and London average of about 11%.

7.2.70 In 2013, the average resident in Enfield earned £559 a week[21], before any deductions. This figure compares unfavourably with the London average, which, during the same period, was close to sixty pounds higher at £613.

7.2.71 Enfield has a relatively large number of claimants. About 15.5% of the working age population (31,770) claimed out of work benefits[22]. This is higher than the London (12.9%) and national figures (13.9%)

7.2.72 The top 10 occupations sought by Enfield's JSA claimants[23] (all ages) are summarised in Table 7.5 opposite. Claimants have expressed an interest in low level occupations in sales, administration, retail and elementary service occupations.

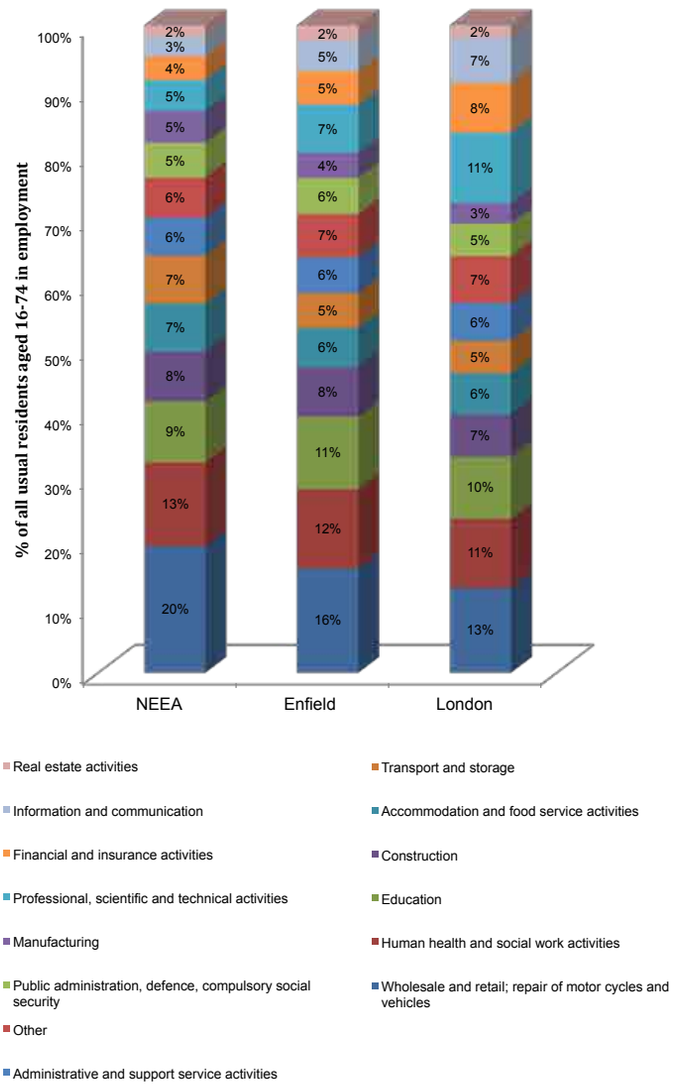


Figure 7.3: Employment by Sector in NEEA, 2012 (Source: BRES, 2012)

19 Source: Experian, 2013.

20 Source: Experian, 2012.

21 Source: ASHE, 2013.

22 Source: Job Centre Plus, Dec 2013.

23 It is important to note that many employers particularly SMEs are less likely to use JCP as an agency for recruitment. As a result, the figures of occupations sought and vacancies in Tables 1.5 and 1.6 are indicative, and may not be a wholly accurate reflection.

Occupation	No. of job seekers
Sales Assistants And Retail Cashiers	310
Administrative Occupations: General	70
Elementary Goods Storage Occupations	60
Elementary Personal Services Occupations	60
Customer Service Occupations	50
Elementary Cleaning Occupations	50
Transport Drivers And Operatives	50
Construction Trades	25
Childcare And Related Personal Services	25
Elementary Construction Occupations	25

Table 7.5: Occupations sought in Enfield by Sector (Source: JCP, September 2013)

7.2.73 In contrast, Enfield's employers are seeking to fill vacancies in mid-level sectors such as business services and construction. Employment agencies are reporting a large number of vacancies transport, logistics sales, and social services sectors. . The top 10 vacancies by sector are summarised in Table 7.6 below.

Employer/Sector	No. of vacancies
Truck Driving	201
General/Other: Sales/Business Development	200
Field Sales	159
Wholesale/Reselling Sales	114
General/Other: Logistics/Transportation	68
General/Other: Construction/Skilled Trades	52
Social Service	46
General/Other: Marketing/Product	40
Franchise - Business Ownership	40
General/Other: Medical/Health	38

Table 7.6: Vacancies in Enfield by Sector (Source: JCP, September 2013)

7.2.74 Difficulties in attracting local applicants to fill these vacancies have led to a reliance on workers from outside of Enfield. A recent employment survey by Enfield Council found that about 59% about employees were recruited from the borough and about 41% from neighbouring boroughs (such as Barnet and Haringey) and eastern England (Broxbourne). Warehousing, logistics, transport and adult health are the sectors that have reported a growing difficulty in attracting local workers.

7.2.75 Other issues such as access to transport around shift patterns of these vacancies have been identified as potential barriers to access. This has been seen as a particularly important factor influencing claimants with families; the high levels of female unemployment in the borough; and the connectivity of Enfield to highly skilled jobs in Stansted and Cambridge.

7.2.76 To help coordinate a response to these issues of barriers to access and low take up, Enfield council has:

- engaged in a partnership agreement with JCP;
- consulted the Chamber of Commerce;
- set up sector forums for Adult Education, Retail and Logistics sectors; and
- supported local residents that reaching the end of the Government's two year work programme in their attempts get back to work.

7.2.77 There are also a number of initiatives that support small businesses and residents interested in started a business in the Borough. Enterprise Enfield is an independent, BIS approved, Enterprise Agency dedicated to helping people start, establish and succeed in business.

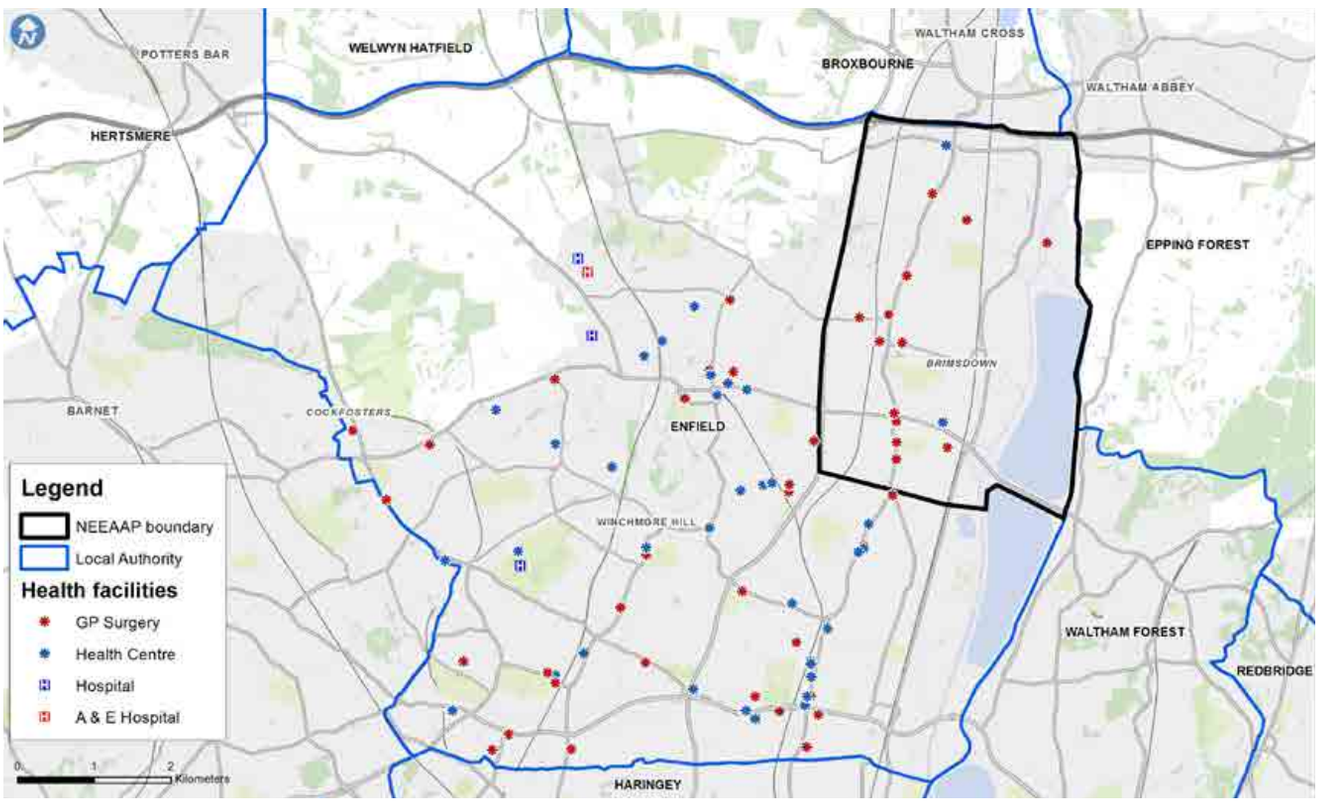
7.2.78 Services include expert advice, guidance and training, as well as managed workspace. Many of these are free or heavily subsidised by Government and European contracts. Business services provided include:

- expert business advice for Start-ups and Existing Businesses;
- q programme of Business Seminars;
- RSA Trust Inspiring Women Programme - 6 month bespoke programme;
- Enfield Rises and Achieves Programme - supporting Enfield residents into self-employment;
- specialist help to raise finance;
- Green Light North London - expert help for businesses to save costs and reduce environmental impact;
- an Annual Business Awards Competition;
- support for securing low cost premises;
- access to networking groups;
- an Enterprise Club;
- regular creative markets; and
- presentation suite hire

7.2.79 Enfield Council is currently drafting an Employment and Skills Strategy. The four strategic objectives for 2014-16 are:

- helping people to access and sustain employment;
- increasing people's skills and qualifications to access and progress work;
- helping businesses to recruit excluded people; and
- increasing inward investment to the Borough through growth and increasing jobs.

FIGURE 7.4: GP SURGERIES, HEALTH CENTRES AND HOSPITALS IN ENFIELD



Name	Type
Care Home Meds	Chemist/Pharmacy
Elgon (Enfield) Ltd	Chemist/Pharmacy
Hyperchem Ltd T/a Ronchetti	Chemist/Pharmacy
Lloyds Pharmacy	Chemist/Pharmacy
The Co-operative Pharmacy	Chemist/Pharmacy
Sainsbury's Pharmacy	Chemist/Pharmacy
The Co-operative Pharmacy	Chemist/Pharmacy
The Co-operative Pharmacy	Chemist/Pharmacy
Ronchetti Pharmacy	Chemist/Pharmacy
Lloyds Pharmacy	Chemist/Pharmacy
Mk Shah Pharmacy	Chemist/Pharmacy
Tesco in-store Pharmacy	Chemist/Pharmacy
Chow Mrs J	Dentist
Bullsmoor Dental Practice	Dentist
Ponders End Dentistry	Dentist
Integrated Dental Services	Dentist
Enfield Dental Practice	Dentist
Carterhouse Dental Lab	Dentist
Bush Hill Park Medical Practice - Branch Surgery	Doctor/GP
Carterhatch Lane Surgery	Doctor/GP
Dean House	Doctor/GP
Eagle House Surgery	Doctor/GP
Freezywater Primary Care Centre	Doctor/GP
Green Street Surgery	Doctor/GP
Brick Lane Surgery	Doctor/GP
Riley House Surgery	Doctor/GP
DMC Enfield Lock	Doctor/GP
Enfield Island Surgery	Doctor/GP
Curzon Avenue Surgery	Doctor/GP
Lincoln Road N	Doctor/GP
Moorfield Road Health Centre	Doctor/GP
East Enfield Practice	Doctor/GP
Lincoln Road Medical Practice	Doctor/GP

Table 7.7: Healthcare Services in NEEA (Source: Experian, 2013)

Health facilities

7.2.80 There are number of Healthcare facilities serving the NEEA. These are listed in Table 7.7 opposite:

7.2.81 The GP Centres, Health Centres and Hospitals serving the Borough are illustrated in Figure 7.4 opposite. Within NEEA, health care facilities are spread largely along the A1010. A number of these are within good accessibility to the proposed Alma Estate[24] regeneration scheme in Ponders End., which will include a new GP practice and gym facilities.

7.2.82 In 2014, health facilities are also to be provided at the new Ordnance Rd Joint Service Centre, a multi-purpose building at the site of the former Ordnance Road Library. The facilities provided at the centre will include a library, doctors' and dentists' surgeries and a community hall.

7.2.83 The National GP Profiles produced by Public Health Observatories[25] reported a high level of patient satisfaction in Enfield, with an average of 76% of patients recommending their practice. NEEA is slightly below the Borough average with an overall satisfaction of 73%.

7.2.84 Within the NEEA, the facilities at Riley House (55%) and DMC Enfield Lock (57%) scored the lowest in terms of satisfaction. A key concern for these practices was the ability to see a GP within the same or next day. An average of 38% of patients of these facilities was able to see their GP within this timeframe, which is below the Borough average of about 50%.

7.2.85 The British Medical Association standard for the number of GP's required is 1 per 1800 people. The existing number of GP's in Enfield broadly meets the current NHS standard.

7.2.86 However, taking account of the Borough's growth agenda, the projected increase in population will result in a need for approximately an additional 25 GP's, nurses and other primary care staff within the Infrastructure Delivery Plan (IDP) period (ref: Infrastructure Delivery Plan Review 2013 – consultation draft).

7.2.87 The regeneration of Ponders End will help meet these requirements through the delivery of a new neighbourhood health centre and a modern GP practice as part of a proposed community hub in Ponders End High Street.

24 The new regenerated Alma Estate in Ponders End will provide between 720 - 800 new homes, with improved green space, improved and secure play areas and more energy efficient homes.

25 Public Health Observatories (PHOs) produce information, data and intelligence on people's health and health care for practitioners, commissioners, policy makers and the wider community.

Housing

7.2.88 Enfield continues to be one the most affordable Boroughs in London for housing. The ONS reported that Enfield's affordability ratio (i.e. the ratio of median house price to median earnings) of 8.38 as the 11th most affordable London Borough. The median price of property in NEEA is £225,000 which is well below the figure for the Borough of around £350,000 (source: Homes.co.uk, October 2013)

7.2.89 Rental accommodation is also relatively affordable in the Borough. About a fifth of accommodation is rented from the Local Authority or a Housing Association, while the same proportion is rented from private landlords[26]. The median rent in NEEA is about £1,100 pcm which is well below that of London as whole (£2,680 pcm).

7.2.90 The majority of council owned properties lie in the East of the Borough. Within NEEA, the Southbury ward has the most properties (1,020 to 1,250 units) while Turkey Street, Enfield Highway and Ponders End also have high levels of council housing (ranging from 790 – 1,020 units each). Enfield lock in contrast has a significantly lower number of council houses (330-560 units).

7.2.91 In 2011/12, the average weekly rent for a property in the private sector was two to three times (depending on the property size) of that seen in Local Authority and Housing Association properties. (Source: Enfield's Tenancy Strategy 2013-18). Further there has been an increase in the number of households claiming housing benefit (up 44% in the last 6 years). This has led to increase in demand for social and rented homes in Enfield. This has contributed to an increase in inequality between the more affluent West of the Borough and the Eastern wards.

7.2.92 Enfield's Tenancy Strategy 2013-2018 outlined a severe shortage of Council and housing association homes for letting in Enfield. Over the past five years 900 homes became available for letting each year to applicants on Enfield's Housing Register. Homes with three or more bedrooms are in very short supply.

7.2.93 Enfield's Letting Forecast for the next two years has identified that there will be a reduction in the number of vacant council and housing association homes available for letting. There will be 743 lettings in 2012/13 and 732 homes for letting in 2013/14.

7.2.94 As part of Core Policy 2 Enfield Council:

- will make provision to exceed the housing target of 3,950 new homes as set out in the London Plan for the period 2007/8 to 2016/17, annualised as 395 dwellings per year; and
- for the fifteen year period from 2010/11 to 2024/25 will plan for the provision of approximately 11,000 new homes.

26 Source: Annual Population Survey, 2012.

Mortality and long-term illness

7.2.95 The JSNA notes that there is some variation in mortality rates in Enfield's wards. Overall Enfield ranks at 14th of the London Borough's across all age groups based on the standardised mortality ratio (SMR)[27]. The national SMR is expressed as 100. Within NEEA, Enfield lock (137.2), Ponders End (114.15) have higher SMRs than the national rate i.e. there is excess mortality.

7.2.96 Cancer is the most reported cause of preventable death in Enfield and nationally. Within NEEA, Enfield Lock, Ponders End and Turkey Street have SMRs for all cancers (excluding melanoma skin cancer) above the borough average of 91 (Source: HSCIC, 2012) but below the London average. For Breast Cancer in particular the age standardised death rate in the Borough of 28% exceeds the London and national percentage (28%). the HSCIC reported that early diagnosis of Breast Cancer is improving in the Borough (ranked 11th in London).

7.2.97 In terms of long-term illness, the JSNA identified diabetes, in particular as a significant risk in the Borough given the make up the population. The greatest risk tends to be for Enfield's Bangladeshi and Black Caribbean residents (up to three times higher than other ethnic groups), linked to their high rates of obesity.

7.2.98 Diabetes affects an about 19,000 residents, with an estimated 4,000 yet to be diagnosed. The National Institute for Health and Care Excellence (NICE) recommends encouraging people to eat healthier. The National Diabetes Audit, encourages shared care and increased monitoring amongst those groups that are under high risk. To this end, Enfield has set up a Diabetes Support Group (a branch of Diabetes UK). It recommends:

- increasing the number of practices in Enfield participating in the National Diabetes Audit; and
- increased monitoring of prevalence of Diabetes.

7.2.99 Given the linkage between diabetes with obesity, tackling the latter at an early age is also a key priority. The JSNA noted childhood obesity as an area of concern in the borough, with a significant number of children and young people overweight (13.6% of pupils) compared to the London (11.2%) and national average (9.6%) in 2011. Obesity rates for the Enfield's Reception pupils are highest in the east of the Borough.

7.2.100 Within NEE, Enfield Lock has one of the highest rates of obesity of about 16.4% Reception pupils. By School Year 6, the wards of Ponders End, Enfield Highway and Enfield Lock have obesity rates approaching 30%.

7.2.101 Tackling obesity requires long-term action. In 2009 Enfield Council, in conjunction with NHS North Central London, and Healthy Enfield, produced its first 'Healthy Weight Strategy for Children and Young People' in response to the growing threat of obesity. This set out a strategy and aspirations for the next ten years, which aims to halt the trend of increasing obesity rates, maintain current levels until 2015; and reversing the trend by 2021.

7.2.102 Areas within the strategy are categorised as follows:

- Promoting healthy lifestyles –the continuation of the Change4Lfe healthy eating programme for 1-4 year olds in children centres; a commitment to increasing the number of children with access to free school meals in primary, secondary and special schools; offering young people and adults courses on healthy lifestyles in colleges and higher education; and greater use of websites and community venues to promote healthy eating and physical activities
- Creating healthy environments – greater consideration of the proximity of fast food establishments to schools; and influencing businesses to adopt healthier cooking processes at takeaways.
- Establishing a care pathway to meet different levels of need – the need for support services such as HELP (Healthy Eating Lifestyle Programme), private enterprises and schools, health professionals, the wider workforce and community leaders to forge strong links to monitor and address weight issues.
- Making effective use of data – to raise awareness of childhood obesity for instance via this feeding back results on obesity to some parents, providing information about how they can support their family to make changes; and explore options to make better use of junior grade health professionals to free up time for school nurses to delivery weight management related support and advice services to parents.

Special needs and social inclusion

7.2.103 The number of adults aged 18-64 with learning disabilities in Enfield is projected to advance from about 4,850 in 2012 to 5,400 by 2020 (Source: Projecting Adult Needs and Service Info). This includes people with severe or moderate learning disabilities; challenging behaviour; autistic spectrum disorders; and Down's syndrome.

7.2.104 The population aged 18-64 with physical disabilities is also expected to increase during this period from 14,442 to 16,418. Those with a serious physical disability are set to rise from 4,069 in 2012 to 4,713 in 2020.

27 SMR is measured by the actual deaths in a given population divided by the number of expected deaths once the local population structure and size have been factored.

7.2.105 An estimated 32,263 adults aged 18-64 in Enfield are living with a common mental disorder (CMD)[28]. Factoring population growth projects, this is projected to rise by an additional by an additional 3,500 people by 2020.

7.2.106 It is therefore increasingly important accommodate people with special needs. One way is through GP offering annual health checks, particularly for those with learning disabilities. In 2011/12 Enfield offered an annual health check to around 61% of adults aged 40-64 with a learning disability. This is above the London average of around 50% and is the 14th highest of the London boroughs.

7.2.107 The provision of settled accommodation, tailored to those with special needs is also important. Enfield council has identified the current provision of accommodation as adequate to serve the needs of the borough. The JSNA shows that about 79% of adults with learning disabilities were recorded as living in settled accommodation in 2012/13. This is the 2nd highest rate in London. The number of residential and nursing facilities is also predicted to remain relatively stable with no additional capacity expected to be required for the next 5 years.

7.2.108 NEE's wards, in generally have the lowest proportions of adults with special needs, with an adequate provision of modern, self-contained accommodation and care facilities, based on the current provision.

7.2.109 In order to continue to support Enfield's adults with special needs, the Council has identified a requirement for:

- additional space to run Carers Satellite Support Services;
- café space to be run as an employment and experience opportunity for young people with LD in transition to adult services;
- decent adult changing facilities for adults with disabilities; and
- nursing home capacity

7.2.110 In addition, Enfield Council has identified gaps in knowledge and quality in the current provision for adults with learning disabilities. Some accommodation facilities are provided by non-Local Authority commissioned. There is limited knowledge on their capacity requirements.

7.2.111 Quality concerns have also arisen over the current residential care home provision for those with leaning facilities. The majority of care homes have achieved a 2 star CQC[29] rating, eight have a 3 star rating, and eight services have a one star rating.

28 Mental orders that cause marked emotional distress and interfere with daily functions but do not usually affect insight or cognition.

29 The Care Quality Commission (CQC) is a non-departmental public body established in 2009 to regulate and inspect health and social care services in England.

Elderly people and social care

7.2.112 About 10% of all households in Enfield are occupied by a person aged 65 or over. This is the 14th highest percentage across London boroughs and in line with the London average, and the Enfield has the fifth largest in terms of the number of households (12,108).

7.2.113 Long-term illnesses contribute the complex needs of the Borough's elderly. Arthritis is the most commonly reported daily condition, affecting 18,000 of the Borough's older population. Projecting Older People's Population Information System (POPPI) predicts that a population of about 21,210 with at least one limiting long-term illness by 2020. This is a rise of about 15%, which is in line with the increase in London.

7.2.114 The JSNA reports that 5,357 people received one or more community care service from Enfield council in 2012. The majority of these (66%) were of White British and White Irish ethnic group. Only 8% were of Black African or Caribbean origin. Enfield scored 18.6 out of 25 in the quality of social care (Source: NASCIS, 2012), which is the 8th highest across London boroughs.

7.2.115 An increasing number of Enfield's elderly population is receiving self-directed support. NASCIS reported that about 80% received self-directed support in 2012/13 compared to about 61% in the previous a year. This is the 7th highest percentage within London Boroughs. Direct payment was the most popular mechanism of support, accounting for about 25% of the Borough's elderly and carers above the London rate of about 19%.

7.2.116 The NASCIS's Adult Social Care Survey reported high levels of satisfaction of the quality of care in the Borough. About 65% of respondents were said to be extremely satisfied with the level of care. Carers were also largely satisfied with the Borough. The results of a Carer's survey showed that the Enfield scored the 5th highest in London.

7.2.117 Enfield Council are identifying ways to expand choices for elder people, particularly improving accessibility for those with disabilities. According to the GLA estimates the total disabled population at mid-2013 in the borough amounts to 49,960 people, which is about 16% of the population. Additional capacity for residential care is not anticipated for the next five years. In terms of letting sheltered accommodation the council has found it increasingly difficult to rent bed-sets. There is a greater preference for one or two bedroom accommodation which offers greater flexibility

7.2.118 NEE's wards are generally well served by sheltered accommodation supply. Turkey Street has been identified as an area where the provision of sheltered accommodation could expand.

Local Centres

7.2.119 The Core Strategy states that Enfield will see a growth of a minimum of 6,000 jobs during the Core Strategy period up to 2026. It is anticipated that 4,000 of these jobs will be in the Upper Lee Valley and 2,000 will be provided in other town centres and the Regeneration Priority Areas. These numbers are considered to be the minimum level of anticipated growth in the Borough.

7.2.120 Ponders End, NEEA's largest local centre is at the forefront of the regeneration of the area. Enfield Council is working with local residents, businesses and other stakeholders to identify improvements to the area with the aim to deliver up 1,000 new homes in the short to medium term. The existing SIL's with Innova Park being expanded.

7.2.121 The focus areas are:

- Ponders End Central (former Middlesex University site and around);
- Ponders End South Street Campus (proposed Academy site on South Street and around);
- Ponders End Waterfront (Columbia Wharf in the Lee Valley and around)

7.2.122 8.3.116 The Ponders End Central Planning Brief was approved by the LDF Cabinet sub-committee in February 2011.This set out key priorities for the area as part of detailed planning and development framework as well as identifying a cluster of sites in the southeast of the area.

7.2.123 Progress to date has included:

- Ponders End Park – with improved access and lighting; dedicated gym and tennis facilities; a refurbished bandstand and more open space;
- The opening of JOBSnet office in South Street
- Oasis Hadley Academy (opened in Jan 2013); and
- South Street improvements (upgrade to Ponders End Square, a new piazza and improved public/cycle access between Scotland Green and Ponders End Station)

Community facilities

7.2.124 Enfield Council has a 14 community halls, offering a range of services and facilities. These are situated alongside various housing estates across the borough. 10 of these halls are managed by Enfield Homes[30] and the Federation of Enfield Community Associations (FECA)[31].

7.2.125 Following conditions surveys undertaken by Enfield Homes in 2009, a programme of refurbishments were completed over a 3 year period. Improvements included Disability and Discrimination Act 1995 (DDA) compliance works, electrical upgrades and a range of other internal and external repairs.

7.2.126 NEEA comprises of a diverse population, in terms of age and ethnicity compared to the rest of the Borough. There a number of community facilities provided across the borough as shown in Figure 7.5 opposite. NEE is currently served by St George's Parish hall; five additional community centres/halls; three youth clubs; one sports club; and two leisure centres. This is in addition to sports hall facilities, football academy and playing fields provided the schools and college (as described above).

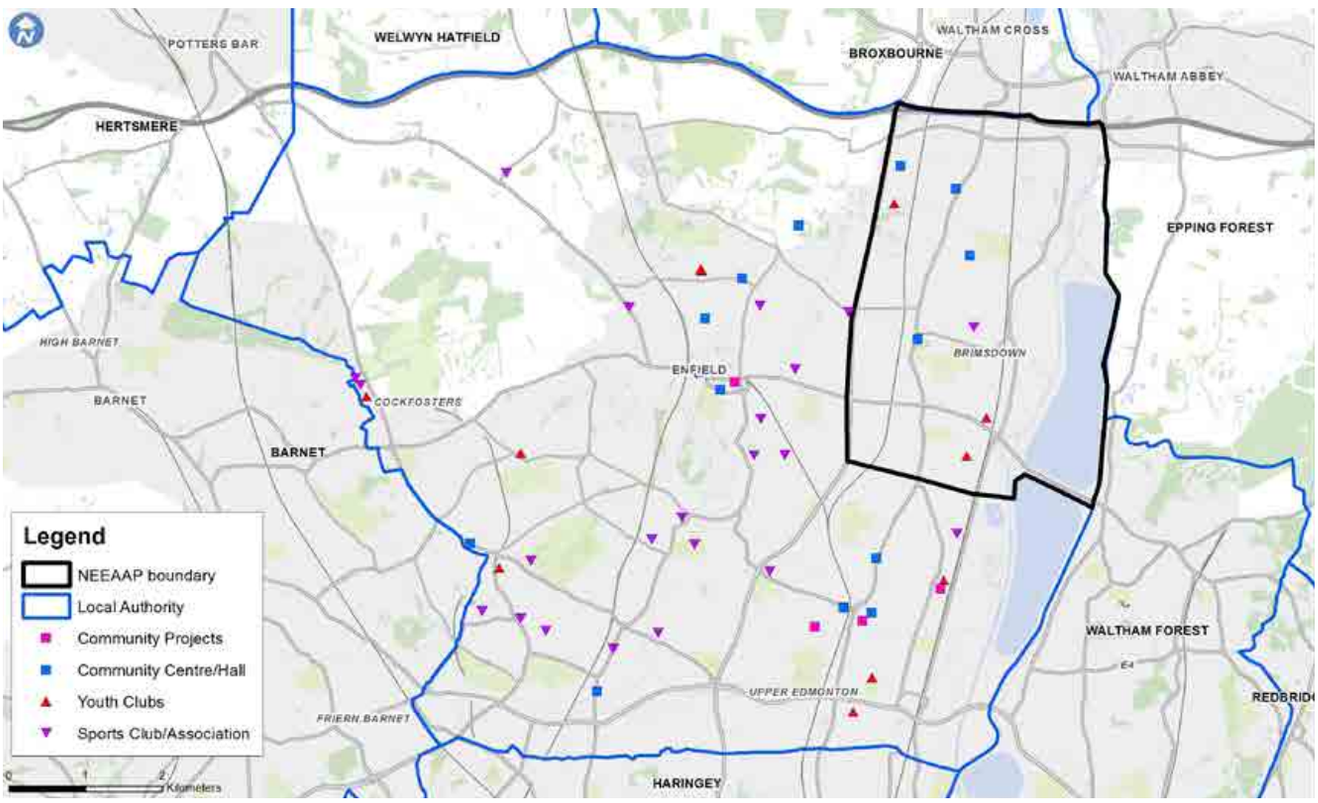
Name	Ward	Facilities
Welcome Point Community Centre	Ponders End	Capacity for 175 people; 2 additional rooms; kitchen/snack bar area; disabled facilities; on site car park.
Kettering	Enfield Lock	Capacity for 120 people; large stage; kitchen facilities; parking; disabled facilities; children's play area
St Hellier	Enfield Highway	Capacity for 100 people; Additional meeting room for up to 20 people; kitchen; disabled facilities; limited parking spaces
Ayley Croft Community Hall	Southbury	Capacity for 120 people; small stage area; parking; disabled facilities
Kempe Road Community Hall	Turkey Street	Capacity for 120 people; parquet dance floor; kitchen facilities; car parking; disabled access

Table 7.8: Community hall facilities in NEE (Source: Enfield Council)

30 The Council's arm's length management organisation.

31 FECA is made up of representatives from Enfield tenants' and residents' associations and plays an important role in monitoring housing services for Enfield residents.. Bookings are managed by Halls4all, a part of FECA.

FIGURE 7.5: COMMUNITY FACILITIES IN ENFIELD



Source: PBA, 2013

Name	Ward	Facilities
Ponders End Youth Centre	Ponders End	Youth organisation. Various activities; programmes and services available (ports, cooking, dance, music, trampolining)
The Scout Association	Turkey Street	Youth organisation
The Enfield Sea Cadet Corps	Ponders End	Youth organisation
Brimsdown Sports & Social Club	Enfield Highway	Sports ground leased to Enfield Football Club.
Southbury Leisure Centre	Southbury	Café; crèche; gym; swimming pool; indoor sports courts; meeting room; health suite; group exercise studio
Albany Leisure Centre	Enfield Highway	Café; car park; group exercise studio; gym; heath suite; swimming pool; learning pool

Table 7.9: Youth organisations and sports facilities i NEE (Source: Enfield Council)

7.2.127 NEEA's Bangladeshi community, one of the fast growing in the borough, is currently served by the Bangladesh Welfare Association of Enfield (EBWA), whose community centre is located on the High Street. The EBWA, are involved in a number of community projects, aimed at relieving economic deprivation and social isolation of the Bangladeshi community. They also offer services such as community hall hire (of up to 50 seats)..

7.2.128 The Ponders End Framework for Change programme (2009) identified a lack of space that could be used by community groups. In response Enfield Council explored opportunities to provide community spaces through the refurbishment of existing buildings (for instance, the Ponders End Youth Centre); the flexible use of existing school and college facilities; and the provision of new buildings (e.g. Oasis Hadley Academy).

7.2.129 The Infrastructure Delivery Plan Review (2013) noted that further research is required to ascertain the level of usage, capacity and demand for meeting halls. Evidence of FECA suggests that the community halls that they manage are well used, with higher usage levels at halls that have been recently refurbished. Evidence from the council's school letting service also indicated that schools' premises are regularly used usage can vary considerably from school to school and from day to day.

7.2.130 The increase in population will lead to an increase in levels of demand for community hall/meeting spaces. While, it is difficult to predict future requirements for community facilities an indication of this can be determined with reference to external benchmarks. The Sports Facility Calculator (SFC)[32] is a tool commonly used to help identify new and future demand for facilities that is created by a given population.

7.2.131 Applying GLA mid-year population estimates to the SFC, the results indicates that the current provision of swimming pools and sports hall facilities, and are adequate for the population.

7.2.132 Based on GLA projections, the population on NEEA is to advance by about 12% by 2023, the SFC forecasts a demand for additional swimming pool and a community hall.

7.2.133 A survey was conducted by Community First, in spring 2013, with the main purpose being to refine community plans in each of the five wards in North East Enfield and South East Enfield for the programmes running from April 2011 – March 2015[33]. For NEEA included Enfield Lock, Enfield Highway and Ponders End.

7.2.134 Overall the survey showed mixed levels of satisfaction of across the key themes of safety; children, young people and adults; shops; places to relax; schools; and whether respondents are happy to live in the area. The results showed a general consensus (65% of respondents) deeming existing facilities as reasonably clean, tidy and well-kept. Respondents within NEEA highlighted a need to better maintain the quality of the Kempe Road Community Hall with new tables and chairs.

7.2.135 There were differences in opinion with regards the more subjective issues in the survey. Respondents from Ponders End expressed relatively higher levels of disagreement (39%) as to the statement that the ward is a "good place to meet, relax and enjoy life", compared to average for the other wards (33%).

7.2.136 The survey as a whole also showed a divided opinion as to whether the area is "interesting for adults and young people." Respondents from NEEA suggested that more community activities, making better use of existing facilities, are required, to cater for the diverse population. Fitness classes and sports activities aimed at particular groups (women only, young adults, and children) were listed as potential solutions. A need for local enforcement groups, for instance, a residents' association was also highlighted, in order to improve safety in the area.

32 The SFC has been created by Sport England to help local planning authorities quantify how much additional demand for the key community sports facilities (swimming pools, sports halls and artificial grass pitches), is generated by populations of new growth, development and regeneration areas. The SFC was first developed to help estimate the facility needs of the new communities in the Eastern Quarry Development, Dartford, and the Milton Keynes future growth areas. It has been used to help local authorities in infrastructure planning, s.106 and Supplementary Planning Documents.

33 The survey was part of "Big Society agenda seeks to involve more people in improving the quality of life in neighbourhoods and shaping their future."

Retail

7.2.137 Low spending power in the NEEA (described above) continues to limit the sustainability of the retail sector in the area particularly in the wards that have relatively high levels of economic deprivation. Efforts to raise the skills profile of existing residents; attracting investment from businesses; and encouraging a highly skilled population to move into the area are seen as important to raise average incomes and demand for higher quality retail offering.

7.2.138 The JSNA notes that crime continues to be problem in the borough, particularly lined with child poverty in the deprived wards in the east. In terms of offenders, those aged 10-19 account for the largest proportion of suspects in crimes reported in Enfield (21%), followed by those aged 20-24 (17%). The most deprived neighbourhood classification areas tend to have reported rates of crime of 1.6-2.5 times higher than the least deprived neighbourhood classification areas (based on crime data triangulated with ACORN classification data).

7.2.139 Therefore, to ensure a sustainable retail offering, it is also important to address the level of crime in the Borough, though partnership working and specialist services, particularly the Borough's children.

Transport

7.2.140 Enfield's transport strategy aims to:

- create a transport network that is accessible and safe for all;
- encourage the use of sustainable modes of transport to reduce congestion and parking stress, and responding to the local causes and impacts of climate change;
- improve poor bus links between strategic growth areas and town centres;
- provide good quality orbital public transport links to improve access to jobs and services, and better access to public transport in the east of Enfield;
- smooth traffic flows and providing good access to the strategic road network while protecting the amenity of residential neighbourhoods;
- improve the street scene and access to green and open areas;
- support proposed improvements to the West Anglia Mainline in the Lee Valley; and
- enhance the environment and improving links to the Upper Lee Valley to support growth.

7.2.141 Within NEE, the Council are engaged in the following major schemes, subject to funding approval from Transport for London (TfL):

- Ponders End – improved access to Southbury Station, public realm and operational improvement to South Street and the A1010 Hertford Road; and
- Hertford Road, EN3 – Improving access, streetscape and movement along the A1010 Hertford Road.

7.2.142 Private vehicle ownership in Enfield is relatively high compared to other London Borough's. According to the census 2011, about 32% of Enfield's households have no access to a car or a van. This below the average for average for London Boroughs of about 41%.

7.2.143 NEE in particular has the highest percentage of households with no access to vehicles. Over half of households in the Ponders End Ward have no access to a car or van. The proportion for the rest of NEE is closer to the London average.

7.2.144 Bus transport continues to be crucial to the Enfield, particularly as it is the main method of travel for the Borough's low income households. NEE is served by a number of bus routes of varying frequency and duration. Latest statistics from TfL on quality of service reveal that:

- passengers of high frequency services such as the 121, 279 and 349 buses have experienced similar average waiting times compared to the same period a quarter ago (of about 6 minutes);
- infrequent services such as the 317 and 327 also remained consistent during this period; and
- night buses such as the N279, reported a slight reduction in service with about 90% of buses reported to be on time compared to about 93% a year earlier.

7.2.145 Improving access and connectivity via walking and cycle routes are also important elements of the Borough's Transport Strategy. About 50% of journey to work were by walking, cycling or public transport in 2008. The borough is targeting this percentage to increase 60% by 2026.

7.2.146 The NEE Interim Direction Statement noted that poor connectivity across the eastern railway corridor and Brimsdown area discouraged walking and cycling in the area. This has resulted in the frequent use motor vehicles for relatively short journeys. Opportunities to manage traffic in the area as well as improve the retail and local centre offering therefore rest on improvements to pedestrian access and cycling.

7.3 NEE's Infrastructure requirements

GLA Projections

7.3.1 The GLA's latest (2013) projections[34] for the Borough suggest that, between 2013 and 2023:

- Enfield's population is to grow by 12% to about 332,000. The population growth is to be driven by increases in those usual working age (16-64) and those aged 65+. The population of children (aged 0-15) is expected to advance by 10% in this period.
- The number of households is also set to advance by 17% to around 145,900. The average household size is set to decline from about 2.57 to 2.47 people per dwelling.

7.3.2 In terms of population and household growth Enfield ranks as one of the highest London Boroughs. The average population and household growth rate for outer London is forecast to be around 11%, while for London as a whole the figure is about 10%.

7.3.3 Enfield's neighbouring boroughs of Barnet (13%), Waltham Forest (10%) and Haringey (10%) are also forecast to grow significantly from 2013 to 2023 in terms of population and households. The region is set to experience significant growth and therefore the development of NEEA presents an opportunity to generate sustainable development by improving links with local communities, and accessibility in the area and London as a whole. This will enable the borough to tap into a larger supply of labour and help attract inwards investment from businesses.

NEEA's future infrastructure requirements

7.3.4 This qualitative and quantitative update on the socio-economic profile of the area has identified the following areas to inform the AAP:

- Support for Enfield's industrial sites – NEE's industrial hub and locational advantages (London-Stansted-Cambridge corridor) make it a key driver of growth in area. Fostering the development of growth sectors (Wholesale and Logistics, Manufacturing, Construction, Green & Carbon Reduction sector) will attract inwards investment and offer sustainable employment opportunities. Initiatives such as establishing sector forums for particular industries will help enable this and links well with plans for the employment and skills strategy.
- The provision of affordable housing key to the continued regeneration of the area. NEEA's wards are relatively deprived compared to rest of the borough. With continued pressure on the provision of council housing, and relatively low level of income of residents, it is important that developments such as Ponders End address the housing shortfall with the lowest income groups and improve safety and the urban feel of the area, so attract a diverse population to move into the area.
- A continuation of Early Years funding to address the needs of working parents and enable people back to work, and improve the skills of the future workforce. The success of the Early Years scheme relies on certainty around long-term Government funding and careful planning by the council on the location of services (e.g. near places of work in the Borough) and accessibility. This will provide crucial underpinning for the Borough's Education and Employment and Skills Strategy in enabling the borough's children to have the necessary environment that fosters their development from an early age; ensuring that they are well equipped as they enter further years of school education; and have continually progressed with desired skill-sets to succeed in employment.
- An Education Strategy that unlocks demand for the borough's existing facilities, capitalising on its key strengths and unique offerings. Facilities such as the state-of-art construction and engineering facilities at the College are largely undersubscribed and taken up by students from outside of the borough. Encouraging take up by residents gives them opportunity to upgrade their skills and meet the demands of the borough's growing sectors of employment with a rich supply of multi-skilled labour, and increase the average income in the borough.
- A joined-up approach to health and wellbeing, with buy in from the community, the council, health professionals, local businesses and voluntary organisations. This is to ensure that there is a targeted and coordinated response to the key health concerns affecting residents such as child poverty, obesity, diabetes and long-term illnesses; and continued promotion of healthier lifestyles that make greater use of the borough's open space and leisure facilities.
- Further research in evaluating usage of the Borough's existing community and sports facilities in order to respond appropriately to the changing needs of residents. The population is expected to grow significantly and it is crucial to that social infrastructure responds to the demographic changes proactively. Part of this will be met by encouraging flexible use of extensive school, college and community halls and open space; and better coordination with the wealth of community groups and organisations in the borough.
- Continued partnerships and collaboration between the Council, local centres, community and businesses with regards the Borough's education, skills and employment strategy. A number of community initiatives and services are in place to raise the skills profile and employability of residents as well as increasing the urban feel of the area.

34 GLA 2013 round mid-year projections, central scenario, December 2013.

- A transport strategy designed to improve the safety, accessibility and connectivity for NEEAs businesses and residents. Key components of this include:
  - continued improvements to public transport, pedestrian and cycle access are seen to be crucial to unlock benefits arising from NEEA's local centres and retail offering and make the area a more attractive place to live and do business;
  - increased accessibility for NEEA residents to local employment areas and industrial estates, enabling the Borough's growing employers to attract a greater proportion of applicants locally; and
  - improving the commute options to ease congestion along the A1010 Hertford Road corridor seen as crucial for connectivity for NEEA's businesses and their customers; and residents' access to social infrastructure and community facilities.



Appendices

8.1 Evidence Base: Document List

Document	Lead Author
Planning Policy	
The Enfield Plan Core Strategy 2010 - 2025	LBE
LDF Nov 2010 Proposals Map	LBE
Proposed Submission DMD March 2013	LBE
Proposed Submission DMD Proposals Map March 2013	LBE
Proposed Submission DMD Final Policies Map Booklet	LBE
NEEAAP: Baseline Report 2007 / SA Scoping	LBE
NEEAAP: Issues and Options 2008 / SA	LBE
NEEAAP: Interim AAP 2012 / Consultation Responses	LBE
NEEAAP: SA Scoping Report	LBE
Enfield's Local Plan Monitoring Report 2011	LBE
Statement of Community Involvement 2006	LBE
Housing	
Affordable Housing Viability Study 2009 [Final Version]	Adams Integra
Affordable Housing Viability Study 2009 [Final Version]	
[Appendices]	Adams Integra
Enfield Housing Trajectory Justification Report [2009]	LBE
Enfield Strategic Housing Market Assessment [2010]	ECOTEC
The London Strategic Housing Land Availability Assessment	
and Housing Capacity Study 2009	GLA
The London Strategic Housing Land Availability Assessment	
and Housing Capacity Study 2009-Appendix One	GLA
Estates Renewal Strategy– Selection Methodology/Approach (December 2013 Cabinet) Ongoing To Follow	LBE
Garage Strategy 2013 (December 2013) Ongoing To Follow	LBE

Document	Lead Author
Ordnance Road development: Kettering Hall and former Ordnance public house site	LBE
Academy Street Application	LBE
LBE Application – Former Middlesex University Site and Ponders End High Street	LBE
Specialist Needs Housing Baseline Information	LBE
Retail / Town Centres	
Enfield – A Study of Town Centres [2007]	Nathaniel Lichfield & Partners
Enfield Retail Study Update [2009]	Nathaniel Lichfield & Partners
Town Centres Uses and Boundaries Review (2013)	LBE
Enfield Retail Study (Procuring Consultants) Proposed 1st Draft by February 2014	TBC
Draft Town Centres SPG January 2013	GLA
London Assembly Response – GLA Draft Town Centres Strategy	LA
LBE Response to Draft Town Centres SPG January 2013	LBE
Consumer Expenditure and Comparison Goods Floorspace Need in London Pre-Publication Report August 2013	Experian
Employment / skills	
Enfield Employment Study [2006]	Halcrow
Enfield Employment Land Update [2009]	Halcrow
Enfield Skills and Employment Strategy	LBE
Employment Land Review, April 2012	Roger Tym & Partners
Industrial Estates Strategy (ongoing) Final Report 2013	PBA
Enfield Employment and Skills Strategy 2013 - 2016 (Ongoing Final Draft December 2013)	LBE

Document	Lead Author
Transport	
Core Strategy Transport Assessment/Appendices [2009]	JMP
A1010 Study	Halcrow
A1010 Corridor Study	GVA
Upper Lee Valley Transport Study	JMP
Rail Options Study	Halcrow
Freight by Water Feasibility Study	LBE
Enfield Cycle Action Plan 2013	SKM Colin Buchanan
Cycle Routes in Enfield – Oct 13	LBE
LB Haringey Cycle Map	
Enfield Greenways Plan – Proposed Routes 2011	LBE
Green Infrastructure and Open Environments: The All London Green Grid SPD March 2012	GLA
NGAP Inspectors Report 2002 Inquiry	ODPM
NGAP Modeling 2013 - Consultant Brief	LBE/TFL
NGAP Member Briefing Note 2012	LBE
Epping Forest – NGAP Officer report	EFDC
Broxbourne – NGAP Officer report	BBC
Ponders End High Street TFL Project – Consultant Brief (On-going procurement)	LBE/TFL
Ponders End High Street TFL Project – Winning Submission - Parsons Brinckerhoff	PB
Ponders End High Street TFL Project – Initial Sketch – Issues and Opportunities	PB
Ponders End High Street TFL Project – Ideas Sketch	PB
Ponders End High Street TFL Project – Problems, Opportunities and Issues	LBE
Future Crossing Points Engineering Study (To Follow)	
NGAP – Background Documents (To Follow)	

Document	Lead Author
Cycle Routes In Enfield September 2013	LBE
Strategic Map Car Clubs	LBE
Enfield Mini Holland Bid Document, July 2013	LBE
NGAR Background Documents/ Inquiry	LBE
Brimsdown Riverside Walk Plan	LBE
Flood risk	
Enfield Strategic Flood Risk Assessment Level 1 [2008]	LBE
High level Sequential Test [2009]	LBE
Surface Water Management Plan (2012)	Drain London/ GLA
SFRA Level 2	LBE
HRA / Ecology	
Habitats Regulation Assessment [2009]	LBE
Review of Enfield's Sites of Importance for Nature	
Conservation Citations (2013)	LBE
Appropriate Assessment Screening May 2013	LBE
Enfield Biodiversity Action Plan	LBE
Sustainability / Energy	
Enfield Renewable Energy and Low Carbon Study [2010]	AECOM
Lee Valley Heat Network Feasibility Study	LBE
Prefeasibility Study of the Viability of a Decentralised Energy	
Network in the context of the Upper Lee Valley (2011)	Parsons Brinckerhoff
Enfield 2020 Sustainability Action Plan	LBE
Enfield Air Quality Action Plan	LBE

Document	Lead Author
Conservation / Heritage / Character	
Conservation Area Management Proposals [2007]	The Paul Drury Partnership
Conservation Area Management Proposals [2008]	The Paul Drury Partnership
Updated Conservation Area Appraisals (ongoing December 2013) Draft Ponders End Flour Mills, Enfield Lock, Turkey Street CA Appraisal Received	The Paul Drury Partnership
Enfield Heritage Study [2008]	The Paul Drury Partnership
Enfield Characterisation Study [Feb 2011]	Urban Practitioners
Enfield Urban Design Agenda	LBE
Areas of Archaeological Importance Review (2013)	LBE
Area of Special Character Boundary Review (2013)	LBE
Report on Location of Tall Buildings and Important Local Views	
in Enfield (2013)	LBE
Open space	
Open Space Study	Atkins
Lee Valley Regional Park Framework	Lee Valley Regional Park
Authority	
Metropolitan Open Land and Green Chain Associated Open	
Space Review (2013)	LBE
Open Space Policies Map Paper (2013)	LBE
Green Belt Review (2013)	LBE
Enfield Parks and Open Spaces Strategy 2010-2020	LBE
Leisure Projects in the NEEAAP – Briefing Note	LBE
Albany Park Masterplan Documents	LBE

Document	Lead Author
Infrastructure	
Infrastructure Delivery Plan April 2013	LBE
Joint Strategic Needs Assessment (ongoing – October 2013)	LBE
Ponders End - Mapping of Community Facilities – 2011	LBE
Other	
Viability for CIL and Development Management Document,	
April 2013	Dickinson Serle
Economic Strategy 2011	LBE
Enfield's Local Plan Monitoring Report 2011	LBE
Enfield Food Strategy and Action Plan	LBE
Education – Cabinet Report 051212 – Primary Expansion Programme	LBE
Education – Cabinet Report 190613 – School Expansion Programme Phase 2 2013/14-20117/18	LBE
Education – Cabinet Report 200612 – Strategy for the Provision of Primary Pupil Places	LBE
Education – NEEAAP Briefing Note – School Expansion Programme	LBE
NEEAAP – List of Schools	LBE
NEEAAP – Schools Location Plan	LBE
Education - Cap 1 Review	LBE
Education – Expansion of Childcare Provision Within Children's Centres	LBE
Enfield Children and Young People's Plan 2011-2015	LBE
The Foundation Years – Preventing Poor Children Becoming Poor Adults - 2010	HM Gov
Early Interventions – The Next Steps 2011	HM Gov
Early Intervention – Smart Investment/Massive Savings	HM Gov
Early Education and Childcare 2013	HM Gov
Enfield Play Strategy and Action Plan	LBE

Document	Lead Author
Pre School Provision – Ward Analysis	LBE
Childcare Sufficiency Data (6 Files)	LBE
NEEAAP – Pre School Briefing Paper	LBE
Enfield's Sport, Physical Activity and Physical Education Strategy 2009-2014	LBE
Enfield Safer and Stronger Communities board Partnership Plan – 2012-13	LBE
Ponders End / Alma Estate	
Ponders End: A Framework for Change Aug 2009	LBE / Enfield Strategic Partnership
Ponders End Central Area SPD May 2011	LBE
Ponders End – A Framework for Growth 2009	Studio Egret West
Ponders End Planning Briefs – Feasibility Report	AZ Urban Studio Limited
Alma Masterplan - Submission - Preferred Developer Viability Report To Follow	
Ponders End Water Front Plan – Future Interventions	LBE
Ponders End Water Front Plan – Plan of Land Ownerships	LBE
Heron Hall Pre-application Masterplan – Former Middlesex University Site, Ponders End	HH
Land Title Heron Hall – Former Middlesex University Site, Ponders End, October 2013	HH/Land Registry
OLF 2 North East Enfield Bid Document	LBE
Ponders End Waterfront – ALGG Proposal	LBE

Document	Lead Author
Consultations - Adjoining Authority / GLA/CLG - LBE Response	
Broxbourne Council Waltham Cross Town Center Strategy /LBE response 2012	
Epping Forest Local Plan Issues and Options /LBE response 2012	
Lee Valley Regional Park Authority Park Framework/ LBE response 2012	
Crossrail 2 Strategic Options/LBE response 2013	
GLA Town Centres SPD/LBE response 2013	
Property Matters	
HRA Sites Plan	LBE
LBE Property Disposals Sites	LBE
Glyn Road Car Park Proposals	LBE
Private Industrial Sites Availability	LBE
NEEAAP – LBE Property – Briefing Note	LBE

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