DEVELOPING THE ECONOMY OF NORTH LONDON:

A NORTH LONDON ECONOMIC DEVELOPMENT IMPLEMENTATION PLAN

Introduction

The North London Strategic Alliance (NLSA) is being funded by the London Development Agency (LDA) to produce an Economic Development Implementation Plan for the North London sub-region (SREDIP). The Plan will identify additional or joint actions where cross-borough and partnership working is the most effective way to enable the successful development and growth of North London, promote regeneration and attract public and private sector investment. It will not duplicate work more appropriately addressed at the local borough or London regional level.

The benefit to North London partners will be a collaborative effort to sustaining North London as a significant economic sub-region of London, an attractive business location and an attractive place to work and to live. It will also help make sub-regional flagship development opportunities a reality.

The NLSA event held on 16th September 2005 launched the consultation process for North London partners. A timetable and agreed process has been implemented with a view to agreeing a final North London Economic Development Implementation Plan by April 2006.

The priorities identified in this document – the Upper Lee Valley, town centres, transport, and internal and external growth drivers – are drawn from existing North London strategies and consultation with stakeholders. These sub-regional priorities were discussed at the NLSA Strategy Group in July 2005, and partners were consulted on them at the 16th September event, which was attended by just under 100 representatives of the public, private and voluntary sectors from across North London.

A draft implementation plan was then developed for formal consultation with an 'experts group' and the voluntary and business sectors in November / December 2005. Further consultation took place in January / early February 2006 before a final draft is submitted to the Councils of the four North London boroughs for comments and approval in March / April 2006.

SUPPORTED BY LONDON DEVELOPMENT AGENCY
WORKING FOR THE MAYOR OF LONDON

NORTH LONDON STRATEGIC ALLIANCE

The North London SREDIP will need to be signed off by the LDA Board in consultation with the Mayor.

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Background

The North London SREDIP reflects the actions local partners consider to be of importance to North London. These are:

Upper Lee Valley

The **Upper Lee Valley (ULV)** is a six-mile corridor extending north from Lea Bridge Road in Waltham Forest, through **Tottenham Hale** in Haringey (designated as a separate Opportunity Area) to the M25 at the boundary of Enfield and Hertfordshire and east into Waltham Forest, focused around the Lee Valley Regional Park. It comprises one of the largest remaining concentrations of industrial land in London. In addition to Tottenham Hale, **Blackhorse Lane** and **Leyton Temple Mills** in Waltham Forest are seen as key development sites, along with **Innova Business Park** and **Central Leaside** in Enfield. Overall the ULV is the area most in need of transformation and with the greatest potential for development, intensification, and possibly change of use in some of the more marginal areas. It is defined not just by its old industrial past and demography (concentrations of deprivation, ethnic diversity), but also by its physical geography including the Lee navigation canal, the River Lea and reservoirs. It represents one of the largest areas of water within the London boundary, but much of this water is hidden from view behind industrial estates, enclosed within the boundaries of Thames Water land or lying unseen beyond under-used areas of the Lee Valley Regional Park.

The three local authorities and their private, public and voluntary sector partners are developing a new vision for the ULV for the next 30 years of ***Lee Valley: North London's Waterside*** which will put the **regional park** and the waterways at its heart to transform the area, using and adapting the new town concept to plan and realise a new future for the area. A future which will embrace a diversity of land uses in the corridor, reflecting the history and character of north London but also acknowledging the need for change and seeking to attain a sustainable mix of uses. a place where people will be able to find a place to live and move up the housing ladder without having to move out, where businesses will be able to do the same, and where local people will find job opportunities and climb 'skillls ladder' that will help them break the cycle of deprivation which has become a structural part of the local economy. This vision will create an exemplar of a sustainable community, making best use of the natural and human resources, well-connected to existing communities and a seamless extension and legacy of the Olympics-driven regeneration of the Lower Lea Valley

Town Centres

London's historical development is one which has been based on the development of a series of small towns and villages which to this day still have a strong resonance with the people who live there. The North London SREDIP recognises this and strongly supports the polycentric approach to using town centres as places for housing growth but also as places for local employment in retail, leisure and cultural activities and
office services to ensure that London maintains a diverse economy with a strong sub-regional focus.

Transport

Although some parts of North London are well-connected, further investment is needed in transport to ensure that:

- some of London's most deprived communities, particularly those bordering the **Lee Valley**, can access jobs in central and east London and north of the M25;
- North London's strong performance in logistics and distribution can perform even more strongly;
- North London's town centres can grow more strongly and accommodate greater housing growth, reinforcing them with a strong sense of place as local cultural and employment centres, thus strengthening the polycentric approach to London's development; and
- with better radial connections, ensure that North London's people can access jobs in the major **growth drivers** at Cricklewood / Brent Cross, Wembley and Heathrow to the west; Stratford City, the Olympics and Thames Gateway to the east; and Stansted and Luton airports to the north.

Growth Drivers

North London is at the heart of growth, being at the confluence of three of the Government's growth corridors – Thames Gateway and London-Stansted-Cambridge – and the emerging M1/A1 corridor, and in close proximity to the Central Activity Zone. With improved orbital **transport**, this presents an outstanding opportunity for the North London economy, and its development is also a regional necessity if the major projects in London and the South-East are to be sustained.

Actions arising from these priorities will be consistent with the policies of the London Plan and other Mayoral Strategies. In particular, the North London SREDIP will:

- reflect the priorities and objectives set out in the Mayor's Economic Development Strategy (EDS), a revised version of which was launched in January 2005. **Economic Development Strategy for London – 'Sustaining Success'** sets out priorities for the sustainable, equitable and healthy growth and development of London's economy to 2016.
- show a close fit to the Greater London Authority's Sub-Regional Development Framework (SRDF) for North London, which aims to provide guidance on implementing the London Plan at the sub-regional level. Consultation has taken place on the latest draft of the North London SRDF (July 2005), and the 16th September event "Planning for North London's Future" was part of that consultation process in North London. This document is consistent with the NLSA's formal response to the draft SRDF.

The activities identified for North London in the SREDIP will therefore be mapped in particular against the four major investment themes and related objectives set out in the Mayor's EDS. These are:

Investment in places and infrastructure - to accommodate growth and ensure sustainable communities and enterprises in London.

- Supporting the delivery of the London Plan, to promote sustainable growth and economic development.
- Delivering an improved and effective infrastructure to support London's future growth and development.
- Delivering healthy, sustainable, high quality communities and urban environments.

Investment in people – to improve economic inclusion and enable all Londoners to fulfil their potential.

- Tackling barriers to employment.

- Reducing disparities in labour market outcome between groups.
- Addressing the impacts of concentrations of disadvantage.

Investment in enterprise – to enable enterprise growth and competitiveness.

- Addressing barriers to enterprise start-up, growth and competitiveness.
- Maintaining London's position as a key enterprise and trading location.
- Improving the skills of the workforce.
- Maximising the productivity and innovation potential of London's enterprises.

Investment in marketing and promotion – to make sure that what London offers is understood, supported and valued.

- Ensuring a coherent approach to marketing and promoting London.
- Co-ordinating effective marketing and promotion activities.
- Maintaining and developing London as a top international destination and principal UK gateway for visitors, tourism and investment.

The North London SREDIP takes into account the information and issues raised in the North London SRDF to help identify where partnership and collaborative action at the sub-regional level can support the policies identified in it.

The North London Sub-Region

Introduction

The North London sub-region is defined as the four London boroughs of Barnet, Enfield, Haringey and Waltham Forest. With a population of just over 1 million (2001 Census), it is larger than Birmingham, and has an economy comparable in size to the cities of Manchester and Edinburgh.

Although it can therefore be seen as a major economy in its own right, it is first and foremost **an integral part of the London economy**. For a city the size of London to develop in a sustainable way, it must have a hierarchy of sub-regions and centres which are also thriving and providing not only jobs but also an environment and quality of life vital to attract and retain high skilled workers. The continued success of London depends not just on its world city centre but also on the success of North London and the other sub-regions.

Strategic Context

North London lies between three of the four growth areas identified in the Mayor's EDS plus Central London. External drivers for growth therefore include the Stansted Airport expansion and the growth of the London-Stansted-Cambridge-Peterborough corridor to the north, Stratford and the Thames Gateway development to the east, Central London to the south, and the smaller Wembley development and M1 / Luton corridor to the west. The sub-region also borders on, and a small part of Waltham Forest is actually in, the site of the 2012 Olympics. **North London is therefore strategically located for growth.**

But **North London's population growth and economic growth are not equal**. Currently North London has 14% of London's population but only 8% of London's jobs – although with over 300,000 jobs it is still a significant economy in its own right. Job densities are well below levels for London as a whole, with nearly twice the number of residents of working age as jobs and higher levels of out-commuting than any other sub-region**. And the gap is set to widen** with population growth projected to grow by 160,000 – equivalent to a city the size of Peterborough – by 2016 while jobs are predicted to grow by only 5% to 2016 – less than half the London average of 12%.

Character of the sub-region

What this shows about the character of the sub-region is that **North London is primarily a residential area**, with one-third being classic leafy or pleasant Victorian or Edwardian suburb. **But it is not a dormitory**.

It provides:

- jobs for half the resident workforce.
- homes and services for over 1 million people.
- an environment and quality of life which helps London attract and retain the high skilled workforce needed to maintain its competitive advantage in the global economy.

Housing growth

The Sustainable Communities Plan, which designated the four growth areas, projects substantial numbers of new homes within the North London growth corridor. Barnet, although not officially within the growth corridor, has been designated an Opportunity Borough in recognition of its potential to deliver substantial numbers of new homes.

The recent GLA Housing Capacity study increases the targets the Mayor has set for new homes in North London by 25%. North London would have to provide 12% of all new homes in London – a similar proportion to that for West London and higher than that for South London despite covering a smaller area.

Although policy and reality are two different things, housing growth will clearly take place in North London – and the challenge is to plan for that growth and make sure it benefits and addresses the needs of the sub-region, for example by:

- revitalising declining town centres – and improving poor quality public realm;
- unlocking development potential – and bringing investment to under-utilised sites;
- generating new jobs and spending power in the sub-region;
- enabling potential drivers of growth like Tottenham Hale and Cricklewood to gain critical mass and enhance the sub-region's position and contribution to London as a whole.

As North London does not have large areas of under-used brown-field land (like Thames Gateway) or the ability to expand onto green-field land (like Milton Keynes or Harlow), this gives the sub-region an opportunity to consider growth in an urban area – the kind of growth that is far more likely to be characteristic of development in the densely populated South East.

Delivering Sustainable Communities in North London

North London has much to celebrate and much to offer: attractive suburbs and town centres, a wealth of green space, a diverse and skilled population and a good strategic location. It will face many challenges and opportunities over the coming years. We hope that by working together as a group we can maximise the benefits to the sub-region and demonstrate the offer we can make to London and the South East – so that North London can:

- transforms its poorer areas, leaving the Upper Lee Valley as regenerated as the Lower Lea after 2012.
- renew its brownfield sites and town centres, with new city quarters at Brent Cross and Tottenham Hale, and vibrant town centres reflecting the strong cultures and communities of North London.
- ensure that all its diverse population has the skills and aspiration to access the employment opportunities both within and surrounding the sub-region.
- benefit from the opportunities offered by housing and economic growth – with up to 50,000 new homes and 30,000 new jobs projected over the next 10 years.

But to deliver this growth and build sustainable communities North London needs:

- a healthy local economy;
- good education and training provision;
- strong communities and social cohesion;
- a good transport infrastructure; and
- high quality environment, housing, and overall quality of life.

Vision

1/3 of the sub-region is Green Belt – we aim to protect it.
1/3 is attractive suburb – we aim to enhance it; and
1/3 is poorer quality urban area – we aim to improve it.

"Our aspiration is to ensure that North London is able to: take full advantage of its strategic location, deliver its full share of new homes and jobs, transform its poorer areas, enhance its environment and quality of life, and become – across all three-thirds of the sub-region – a thriving community of choice, contributing fully to the success of London."

This vision is underpinned by the four over-arching strategic priorities detailed above:

- Upper Lee Valley – a key Opportunity Area and part of the major regeneration area in North London.
- Town centres – as centres for employment, competitiveness, and vitality; places for higher density housing; and focal points for providing a "sense of place".
- Transport – accessibility, particularly orbital links, improved public transport within the ULV and to regeneration areas, and 'hub and spoke' at interchanges and town centres; plus tackling the underlying problems of road congestion and overcrowded public transport.
- Drivers of growth – ensuring residents gain as much as possible from the opportunities which will come from developments within and just outside the sub-region, for example the 2012 Olympics and the enlargement of Stansted Airport.

A Profile of North London

- Population is projected to grow by 160,000 – equivalent to a city the size of Peterborough – by 2016. The London Plan predicts jobs will grow by only 5% to 2016 – less than half the London average of 12%. The draft SRDF refers to new interim projections which suggest that if current trends continue, net growth in the sub-region could be even lower – at 9,000 jobs – by 2016.
- Significant sub-regional variations in job growth, with Barnet looking at the 6th highest growth rate in London while jobs in Waltham Forest are projected to decline more sharply than anywhere else in London.
- 70% of the sub-region's workforce lives locally, but 46% of residents work outside the sub-region. North London has higher levels of commuting than any other sub-region.
- Nearly a third of residents are from minority ethnic backgrounds, with significant numbers of refugees and asylum seekers in Haringey and parts of Enfield and Waltham Forest.
- Educational achievement levels are slightly below the average for England and for London as a whole.
- 50% of working age residents are employed in professional and managerial occupations. Barnet and Haringey have greater proportions of working age residents qualified at NVQ Level 3 or higher than the London average, but Enfield and Waltham Forest levels lag significantly behind. The proportion of people who have low (below Level 2 or equivalent) or no qualifications has improved only slightly in recent years.
- The employment rate for non-white groups (56%) is significantly lower than that for the white population (72%). Black / Black British living in Barnet and Haringey experience the lowest employment rates in the sub-region. 12% of working age residents are not employed but want to work.
- North London also appears to have significant numbers of economic migrants from the new EU accession states providing a pool of cheap, qualified labour.
- Nearly a third of households contain people with a limiting long-term illness, health problems or a disability. Nearly one in five North London residents of working age is claiming job support, incapacity and/or disablement benefits.
- Almost 40,000 businesses – employing over 300,000 people – but unevenly spread throughout the sub-region. Jobs are concentrated in the Upper Lee Valley, Edgware corridor, and town centres with some spread throughout the area.
- Only Barnet exceeded the national and London-wide Gross Value Added (GVA) growth rate over the 10-year period 1991-2001, at 73.4% compared to 67.3% for Great Britain and 69.6% for London as a whole. Haringey slightly under-performed relative to the national trend having grown at 58.6% over the period, with Enfield and Waltham Forest significantly underperforming at 30.9% growth and only 3.9% growth respectively.
- Primarily a small business economy, with 89% of firms employing 10 or less people and more than the London average of micro-businesses (less than 5 employees). High birth rate for SMEs but also a high failure rate.
- Above London average employment in wholesale, retail, production industries, and the public sector. Below London average employment in finance, business services, R&D and knowledge-intensive industries (outside the public sector), and creative industries.

- Nearly 50,000 people are self-employed – 13% of total employment in the sub-region (similar rate to that for Greater London and Great Britain). Barnet has the greatest number (and rate) of self-employed, Waltham Forest the least.
- Overall the strength of the local economy is in its diversity. However, focus group feedback from businesses indicates North London is not regarded as having yet developed a reputation as a business destination within London.
- Joins several growth corridors and is therefore a "gateway" to the North, with good radial connections to Central London.
- Good connections to the strategic road network, to airports (Heathrow, Stansted, Luton) and to Central London, but problems of congested roads and overcrowded public transport, particularly in the Upper Lee Valley and to regeneration areas.
- Lowest transport investment of any London sub-region set against the need for better transport to enable the increasing population to access jobs both within and outside the sub-region.
- Disproportionately fewer Metropolitan and Major town centres than other London sub-region. Poorly served overall for leisure and cultural facilities.
- One-third of the sub-region is suburban, but with some areas needing investment and/or suffering from traffic congestion.
- Concentrations of poverty and poorer quality housing, particularly in the Upper Lee Valley and eastern Haringey, and to some extent the Edgware corridor and the southern part of Waltham Forest. However, small pockets of deprivation exist even in generally more affluent wards.
- Green space is a major asset, including the Lee Valley Regional Park, city parks and urban woodland. One-third of North London is green space.
- Contains many historic settlements and individual buildings of exceptional importance.

Developing the Priorities for Sub-Regional Action –

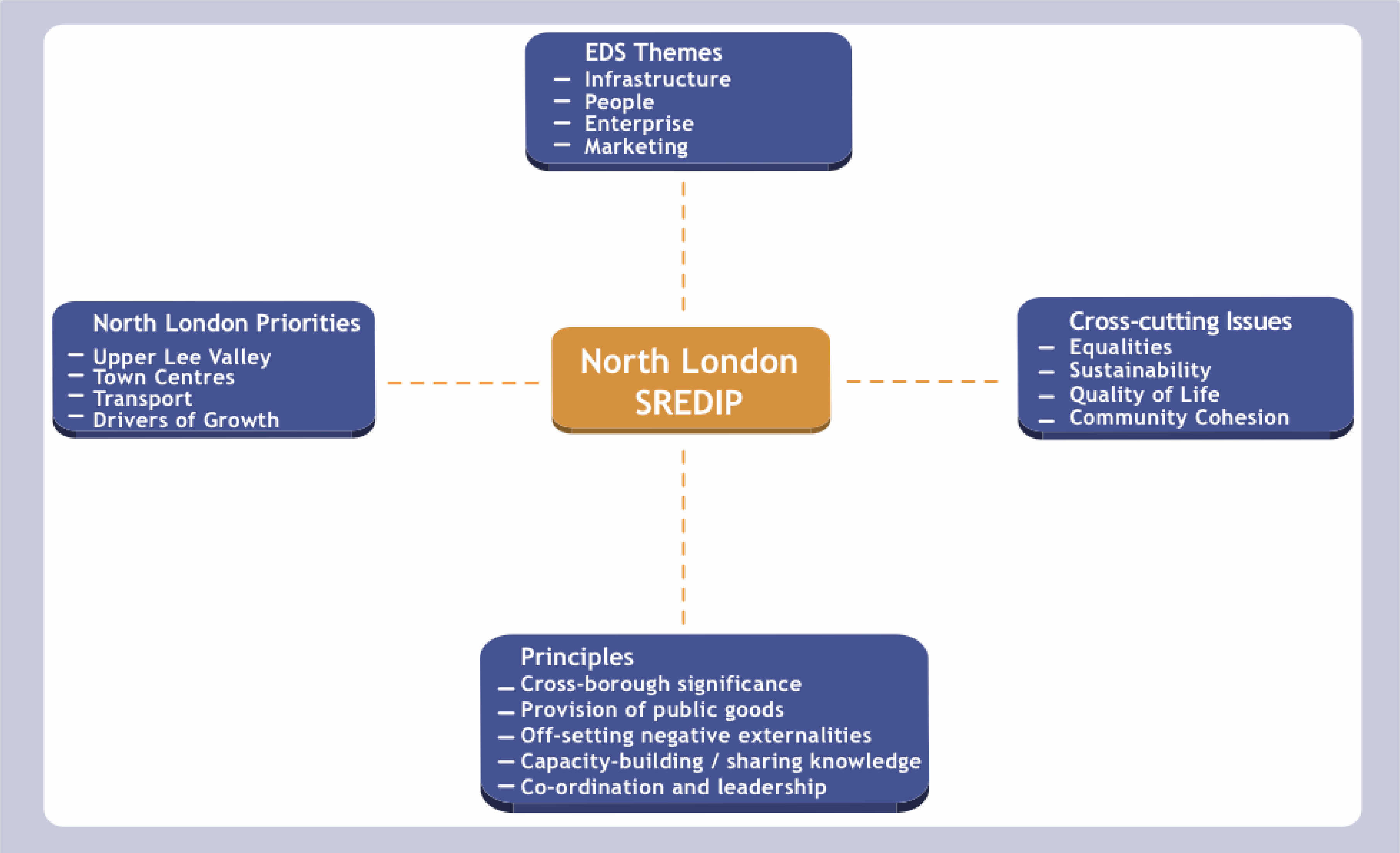
The North London SREDIP is not a 'plan of all plans', nor is it intended to deliver actions that are better served by existing local or sub-regional arrangements. Instead, the North London SREDIP identifies strategic themes that are important across the sub-region and which will benefit from cross-borough (although not necessarily all four boroughs) action. Therefore the actions which will be included in the final version of this implementation plan will need to be strategic in terms of their scale and extent, require the support of two or more partners and be consistent with principles for public sector investment set out in the Mayor's economic development strategy:

- Provision of 'public goods', ie. services that are required by the whole community;
- Resources required to offset negative externalities – for example increased traffic congestion resulting from major developments outside the sub-region.
- Provision of information – for example, to ensure that business can make optimal investment decisions and individuals can more effectively search for employment.
- Co-ordination – for example, to create networks, facilitate land assembly, and provide effective joint promotion and marketing.

The final implementation plan will also be consistent with the London Sustainable Development Commission in ensuring that economic development will not be to the detriment of the environment and or the communities within London. Where trade-offs have to be made, then these will be transparent and minimised. Actions within this plan will also be prioritised on the basis of their contribution to an improved quality of life for those living in the sub region.

Similarly, on equalities, the North London SREDIP seeks through the proposed actions to take positive steps to address institutional discrimination, ensure community cohesion and promote good race relations in accordance with the requirements placed on the public, private and voluntary sectors under the Disability Discrimination Act (1995), the Race Relations (Amendment) Act (2000) and European Employment Directives.

The EDS themes, sub regional priorities, principles and cross cutting themes are summarised in the following diagram:



Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.

NORTH LONDON CONTEXT

Opportunity Areas

The major Area for Regeneration in North London designated in the London Plan stretches along the Lee Valley. The London Plan identifies two Opportunity Areas along the Lee Valley – the Upper Lee Valley, which includes parts of Enfield, Haringey and Waltham Forest, and the Lower Lea Valley, which takes in part of Waltham Forest.

The **Upper Lee Valley (ULV)** is a six-mile corridor extending north from Lea Bridge Road in Waltham Forest through **Tottenham Hale** in Haringey (designated as a separate Opportunity Area) to the M25 at the boundary of Enfield and Hertfordshire, focused around the Lee Valley Regional Park. It comprises one of the largest remaining concentrations of industrial land in London. In addition to Tottenham Hale, **Blackhorse Lane** and **Leyton Temple Mills** in Waltham Forest are seen as key development sites, along with **Innova Business Park** and **Central Leaside** in Enfield.

- *Tottenham Hale:* Well-established for manufacturing, and regarded as the key flagship area offering the biggest opportunity for a step change in the role of the area. It has good public transport accessibility, with mainline rail services to Central London, Stansted Airport and the ULV. However, the local road network (Tottenham Hale gyratory) needs to be reorganised to make more efficient use of land. Haringey Council is producing Supplementary Planning Guidance (SPG) for Tottenham Hale which in is expected to be transferred in due course to an Area Action Plan (AAP) under the emerging Local Development Framework (LDF).

- *Innova Park:* A revised masterplan has recently been approved which includes mixed use development incorporating sites allocated for B1c/B2 use, a new City Academy and residential development. Innova Park is adjacent to both the West Anglia railway line and the M25 motorway – but needs improved access to both.

- *Central Leaside:* Comprises a mixture of brownfield opportunity sites, older industrial estates which are being rejuventated and new industrial accommodation. The area straddles the A406 North Circular Road. While road connections are good, it requires better access by public transport. Central Leaside will be the subject of an AAP which is expected to be adopted by June 2008.

- *Blackhorse Lane:* The main concentration of employment land on the east side of the Lee Valley, opposite Tottenham Hale. Improvements are proposed for parts of the area in industrial / business uses and redevelopment of rundown / vacant parts for business or housing uses, together with access and environmental enhancements. The regeneration relationship to Tottenham Hale and Walthamstow Town Centre is being examined. Waltham Forest is aiming to produce an AAP for Blackhorse Lane for adoption by the summer of 2009.

- *Leyton Temple Mills:* located on the fringes of Stratford and the Thames Gateway, and at the top end of the proposed 2012 Olympic site. It is part of the London-Stansted-Cambridge Corridor and a designated Area for Regeneration in the London Plan. Waltham Forest's Unitary Development Plan (UDP) seeks the re-opening of the nearby Lea Bridge railway station with a service on the Lee Valley line between Enfield and Stratford.

Overall the ULV is the area most in need of transformation and with the greatest potential for development, intensification, and possibly change of use in some of the more marginal areas. It is defined not just by its old industrial past and demography (concentrations of deprivation, ethnic diversity), but also by its physical geography including the Lee navigation canal, the River Lea and reservoirs. It represents one of the largest areas of water within the London boundary, but much of this water is hidden from view behind industrial estates, enclosed within the boundaries of Thames Water land or lying unseen beyond under-used areas of the Lee Valley Regional Park.

The ULV needs a new vision for its future which repositions the ULV from being a public sector problem to a private sector opportunity. There is an emerging partnership of the three ULV boroughs with other key stakeholders such as the Lee Valley Regional Park Authority, North London Ltd. (NLL), the North London Learning and Skills Council (LSC), JobCentre Plus, the GLA and LDA to create and implement a new vision and strategy for the area.

At the same time, the GLA is taking forward development of an Opportunity Area Planning Framework (OAPF) for the ULV in conjunction with LBs Enfield, Haringey, Waltham Forest and the NLSA to be ready by summer 2007. This process will need to add value to the Local Development Documents which the boroughs will be producing under their emerging LDFs.
As noted in the draft SRDF, the Lee Valley has an identified flood risk, and a strategic assessment of this risk needs to be undertaken, linked to the Lower Lee Valley and including the Lee Valley to the north of London in accordance with the ODPM's emerging Planning Policy Statement (PPS) 25. This should feed into the development of the OAPF.

Cricklewood / Brent Cross in Barnet is the third Opportunity Area for North London. It is described in more detail in the section on 'Town Centres' below.

Strategic Employment Locations (SELs)

The London Plan identifies two types of SELs – Industrial Business Parks for businesses requiring a high quality environment, and Preferred Industrial Locations for businesses with less demanding requirements. It designates three locations within North London as Industrial Business Parks: part of the Great Cambridge Road in Enfield, and Tottenham Hale and Wood Green in Haringey.

As well as being part of the ULV Opportunity Area, Central Leaside and Blackhorse Lane are also two of the proposed Preferred Industrial Locations cited in the London Plan as the prime locations for industrial activity and particularly logistics in the sub-region. The others are **Brimsdown** and **Freezywater** in Enfield and **Lea Bridge Gateway** in Waltham Forest (see map).

- *Freezywater:* The former ESAB site (8.3 hectares, 20.5 acres), located adjacent to the M25 motorway, will be redeveloped to provide industrial units. Has entrances onto both Mollison Avenue and Hertford Road. Waltham Cross station is approximately half a mile to the north.
- *Brimsdown:* One of the largest industrial estates in London (after Park Royal), it has an opportunity site comprising some 9 acres in Jeffreys Road. Currently contains over 250 businesses employing over 3,000 people. The site has been assembled by the LDA with the aim of promoting a range of industrial units.

- *Lea Bridge Gateway:* Along with Blackhorse Road, it comprises up to 12 ha. Of land with good access via the new Leyton Relief Road to the M11 link road. Sites are available for new industrial units including development of a green industries cluster.

The GLA draft Supplementary Planning Guidance (SPG) on Industrial and Warehousing Land (Sept. 2003) suggests that about 100 ha. Of industrial land could be released for other uses, eg. housing. All four North London boroughs have provisionally been placed in the intermediate 'limited' release category. The NLSA, however, does not accept the 100 ha. 'benchmark' as being justified by the local employment situation and opportunity potential, particularly as most would come from the ULV, a major regeneration area. Among the key findings of the North London Employment Land Study (final draft – March 2006), commissioned by the LDA and NLSA, are that:

- significant economic restructuring in the industrial / warehousing sectors appears to have already taken place in the period 2001-2005, which reduces the potential land release in the period 2005-2016 to around 50 ha.
- the majority of land suitable for potential release is located in Barnet and Haringey.

The Mayor's waste alteration to the London Plan (October 2005) indicates a need for 31.4 ha. Of land for waste management facilities in North London, to be found mainly from its industrial land stock; much of that would be in the Lea Valley.

Town Centres

Town centres play a critical role as a focal point for community identity and for providing a range of community facilities in North London.

North London has only one of London's Metropolitan centres – Wood Green (Haringey), and three Major town centres – Edgware (Barnet), Enfield Town (Enfield), and Walthamstow Town Centre (Waltham Forest). It also has 28 District centres (London Plan typology), some of which are thriving, with a range of leisure and cultural provision and strong evening economies. Others need regeneration. In many cases improved transport accessibility (local and across the sub-region), increased local employment, a mix of uses and provision of a range of facilities including leisure and cultural activities are critical to their future development and prosperity.

Brent Cross had, in 2001, the fourth largest comparison goods retail expenditure in London outside the West End. Crickelwood / Brent Cross is planned to become a fully-fledged town centre and would, if development proposals are implemented in line with strategic policy, become the sixth largest retail centre in London in terms of turnover. Cricklewood is currently designated as a District centre but may already be operating as a Major centre.

Wood Green has seen strong improvement in its retail position over the last 10 years but now faces potential threat from new developments in Cricklewood and Enfield, where Enfield Town and Edmonton Green are undergoing significant redevelopment (with a further phase planned for Enfield Town. To address this Haringey Council is developing a Town Centre strategy which will become linked to new Supplementary Planning Guidance (SPG) for the area by December 2006. Significant redevelopment is also taking place at Walthamstow Town Centre.

Areas for Intensification

In addition, the District centre of Colindale in Barnet has been designated as an Area for Intensification, along with Mill Hill East (Barnet) and Haringey Heartlands, situated adjacent to Wood Green.

- *Colindale*: This area offers the capacity to provide a significant number of additional homes and jobs including leisure and other tourism-related uses (given nearby Hendon RAF Museum) through regeneration of the Grahame Park estate, the availability of land for development at the former RAF East Camp and other adjoining sites, plus other emerging areas for redevelopment such as the Colindale Hospital site.
- *Mill Hill East*:: Opportunities for redevelopment around Mill Hill East underground station, principally at the MOD Inglis Barracks, Mill Hill gas works, and council depot sites – mainly to provide new, high density housing and a mix of uses to provide local employment and services.
- *Haringey Heartlands / Wood Green*: Haringey Council's recently produced development framework for Haringey Heartlands sets out a comprehensive approach to delivering new jobs and homes on the "eastern utilities lands" between the railway and Wood Green town centre, along with improvements to open space, roads, transport, health, leisure and educational facilities. The "western utilities lands" north of Hornsey High have already been developed for new housing and community facilities, and a new park to run alongside the New River is planned.

Population growth and increasing consumer expenditure are generating a need for new retail space. The draft SRDF indicates a need for 100,000 – 160,000 sq.m. of new comparison goods floorspace (in addition to that agreed at Brent Cross). Exploring the capacity within the sub-region's town centres to accommodate growth, checking and co-ordinating the pipeline and assessing future provision is largely a matter for the boroughs, but the NLSA would be happy to contribute to and support a co-ordinated approach to this across the sub-region to secure an outcome which would best achieve sustainability and regeneration objectives.

But while the scope for retail development is important, other town centre functions also warrant full prominence. Allied to housing intensification at centres and the consequent further development of services will be a significant increase in employment which is likely to modify the GLA Economics interim projections substantially. Indeed, the draft SRDF itself notes that generally an increase in resident population of 1,000 will on average have the potential to give rise to a further 230 jobs in the locality.

With respect to development of the town centre network, the focus at the strategic sub-regional level – in addition to Brent Cross – needs to be on two major sites to maximise regeneration benefits:
Wood Green as the Metropolitan centre – where, as noted above – in conjunction with Haringey Heartlands considerable capacity exists for a diversity of development, as demonstrated by the LDA / GOL Town Centre Enhancement (TEN) Study.
Walthamstow, which should receive regeneration priority to develop specialist retail functions alongside growth in leisure, cultural / creative and niche business service sectors.
These centres, together with Enfield Town, occupy key locations within the London-Stansted-Cambridge growth area.

North London already has a significant number of car-based out-of-centre retail parks, and the draft SRDF therefore recommends that growth be focused on areas with good public transport accessibility, particularly town centres. The long-term objective is to make these out-of-centre retail parks evolve into more sustainable forms of land use. This will require closer working between the boroughs and the GLA family to develop shared strategies.

The NLSA recognises the need for sub-regional working to plan for the future of the sub-region's town centres and is at the start of a process of developing a North London Town Centre Group which will bring together the boroughs to discuss issues of shared interest including developing a sub-regional approach to office development.

Offices

The Cricklewood / Brent Cross Opportunity Area remains the location for major office growth within North London over the long term. But if active support policies and implementation mechanisms are put in place, office (business services) growth, as part of mixed-use developments, is also seen as realisable at Wood Green, Enfield and Tottenham Hale (the latter in urban business park format and with the Olympics legacy in mind). Such growth would be oriented to sub-regional and local scale services and to stimulate SME office businesses, particularly in the ULV area. It could also be encouraged at a smaller scale as part of residential intensification schemes at key district centres such as Edmonton and North Finchley.

Housing

The London Plan 'minimum target' for North London is 2,980 additional homes a year, but this is proposed to increase to 3,750 homes p.a. from 2007 (draft Alteration to the London Plan). Barnet would have the major increase in annual target (more than double) while Waltham Forest would have a small increase, and Enfield and Haringey would have reduced targets.

The Roger Tym Study of the London part of the London-Stansted-Cambridge-Peterborough Growth Area (2004) concluded that excluding Barnet the main sources of housing will be the development / intensification of many small sites, as few large "strategic" sites exist. It suggested that to achieve an accelerated housing output would require a partnership culture between developers and the public sector, a more pro-active approach to mixed-use development, and more resources for transport, affordable housing and community activities. Haringey Heartlands, Tottenham Hale, and Walthamstow Town Centre are seen as especially important opportunities for housing and mixed uses. Blackhorse Lane, Leyton and Lea Bridge Station are also regarded as sites for further housing development.

However, planning and housing policy will not necessarily determine who will actually live in these new homes. Investment buyers and large-scale purchase by social landlords are just two examples of how the profile of the people living in an area can be changed on a significant scale with a consequent impact on demand for local services and on the local economy.

Community facilities

Additional community facilities will be needed in North London to support the growth in population allied to the increase in housing. The SRDF considers that the biggest infrastructure challenge in North London, apart from finding sufficient sites for housing, is identifying land for schools, waste and open space. NLSA will be working with partners to produce a North London Development and Investment Framework which will provide a detailed analysis of the infrastructure and investment needed to underpin development in the sub-region.

Schools

The sub-region has about 180,000 pupils at 448 schools. The numbers of children aged 5-10 is expected to increase by 17% between 2001 and 2021 – an extra 13,500 pupils (675 pupils per year) – with particularly high growth in Haringey (34%) and lower growth in Enfield (8%). The number of children aged 11-15 is expected to increase by 16% over the 20-year period – an extra 10,000 pupils (500 per year) – with Haringey having a rather higher increase (21%) than elsewhere. Given the significant increase expected in the 0-17 population, more secondary schools will be needed, especially after 2011, and a substantial number of new primary schools. There is also a projected demand over the period up to 2012 for 5,000 extra places in Further Education and other training facilities for 16- to 19-year-olds – 2,000 places short of the currently projected new places becoming available. Pressures on land across North London restrict the potential for building new schools and post-16 institutions, particularly in Haringey.

Open Space

One-third of North London is open space. In addition to green spaces in residential areas, this includes substantial stretches of Green Belt, Metropolitan Open Land, ancient woodland and water areas such as Lee Valley Regional Park in the east of the sub-region, Trent Country Park in Enfield (whose ancient woodland once formed part of the royal hunting forest of Enfield Chase) and Epping Forest, which is a major natural open space resource for North London. Waltham Forest is part of the East London Green Grid, which promotes an open space network with links to urban areas.

The Blue Ribbon **waterways** network in North London includes the River Lee and its tributaries, the upper reaches of the River Brent System, the Lee Navigation, the New River and the large reservoirs of the Lee Valley and many other smaller tributary streams. These are all major environmental assets which contribute to a generally positive image of the sub-region's environment.

However, areas of North London have been identified as having open space deficiencies: 40% of those living in the sub-region are said to fall within the indicative deficiency areas.
The Olympics will bring major open space and recreational facilities to an area immediately adjoining the south-eastern part of the sub-region. This will underscore the open space needs of the ULV bordering the Lee Valley Regional Park and create a marked contrast in environmental quality between the ULV and the Lower Lea Valley. Regeneration areas in the ULV in particular lack adequate pedestrian and cycling access to green space including the Lee Valley Regional Park.

Waste disposal

The North London Strategy Group has identified the need for the four boroughs to work together to find appropriate sites for new methods of waste disposal, including exploring the 'no chimneys' approach. The ULV, which is already the site for some recycling, could accommodate more. However, this must be part of a planned approach that includes developing 21st Century high technology units, and using the River Lee to transport waste to and from recycling centres. The Mayor's draft alterations to the London Plan envisage a sub-regional approach, particularly to identify sufficient land for new waste management facilities.
The four North London Boroughs plus Camden, Hackney, and Islington have agreed to work together to produce a Joint Waste Development Plan Document which will provide a co-ordinated sub-regional approach to planning for new and expanded waste facilities across North London including identifying sites for new and expanded waste facilities and the types of facilities needed.

Health

Health care services are being remodelled and are likely to be more concentrated in community settings. Existing hospitals are expected to be able to absorb most of the anticipated increase in demand for secondary health care, although modest expansion of facilities and staff and some service reconfiguration will be needed. A significant proportion of the primary and community health care estate is in need of redevelopment to make it fit for purpose and bring it up to current standards.

Transport

The need to improve North London's transport infrastructure is crucial to realising the sub-region's economic and social regeneration and growth. North London has the highest levels of commuting of any London sub-region, and is facing a growing jobs deficit, yet it receives the lowest levels of sub-regional transport investment. It is also expected to make the third highest contribution to the new housing targets (see 'Housing' section above) despite being the smallest sub-region. It could also face threats to its stopping rail services from external growth areas.

While North London has good radial connections to Central London, east-west orbital movement is poor, with patchy capacity on the road network and major bottlenecks, particularly along parts of the North Circular Road. In the ULV rail capacity is limited, stations are poorly connected, congestion is a continuing feature, and links / services to growth areas (London-Stansted-Cambridge corridor, Stratford and Thames Gateway) are inadequate. Interchanges and town centres lack a 'hub and spoke' structure, inhibiting modal shift and maintaining congestion. Public transport and pedestrian access is needed to key development and employment sites.

If the demands flowing from external growth drivers are taken into account, the effect is to overlay the pattern of internal travel demands and intensify pressure on an already congested network. Improved accessibility will therefore be vital if the North London workforce is to access the new jobs that will become available in both local and external growth areas.

Tackling congestion along the North Circular Road will also be vital to the 2012 Olympics, as it is a priority route for both the movement of logistics and also people to and from the Games including those making up the Olympic Family (members of the International Olympic Committee, sports federations and national Olympic committees who will not be staying in the Olympic Village). Similarly the West Anglia Route Development (WARD), specifically reinstatement of services along the Hall Farm Curve and re-opening of Lea Bridge station, plus an increase in services along the Lee Valley Line including the Tottenham Hale – Stratford link, are needed before 2012 to enhance access to the Olympic Zone from Stansted Airport, the Lee Valley, Walthamstow and Chingford.

The ability of industry to move freight as efficiently as possible is also a major concern. Worsening congestion will affect future private sector investment in the sub-region. North London needs to identify practical actions and develop best practice, including consideration of the use of rail and waterways. This will be done through the development of Freight Quality Partnerships (FPQs), such as that established in Brimsdown in 2002.

These sub-regional transport priorities are being fed into the Sub-Regional Network Plans being developed by Transport for London (TfL) in consultation with key stakeholders including the North London Transport Forum (NLTF), which works under the auspices of

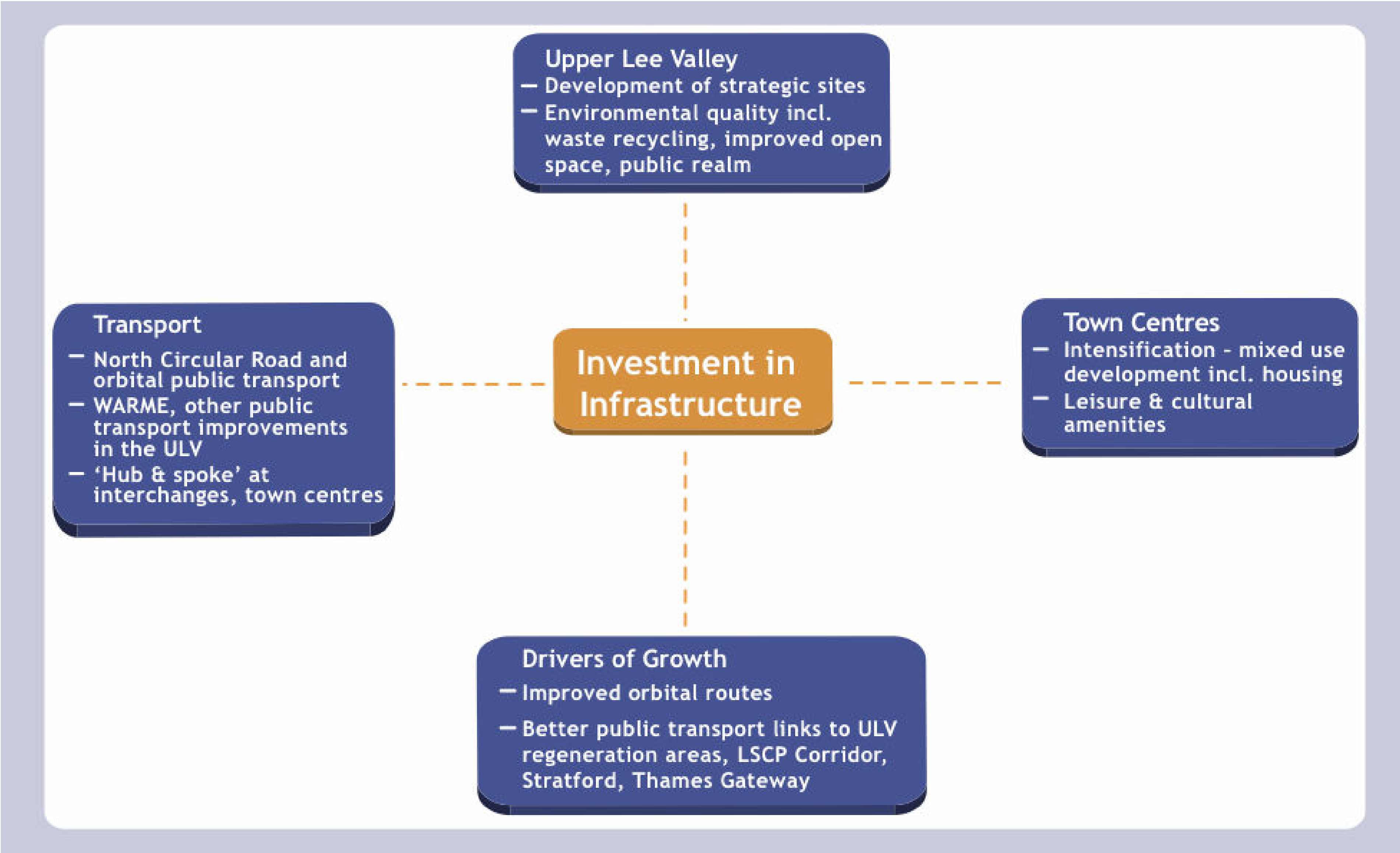
the NLSA to develop the sub-region's infrastructure, is the focus for co-ordination and sub-regional representation on transport themes.

SUMMARY OF KEY ISSUES / PRIORITIES

North London has the potential to be a successful sub-region – to deliver, and benefit from, housing growth and its strategic location adjacent to three of the four growth areas identified in the Mayor's London Plan, plus Central London.

But to do this North London needs:

- improved transport infrastructure / accessibility including:
  - a long-term solution to the North Circular Road which also improves orbital public transport and enhances connections between the sub-region's town centres and key development sites;
  - a coherent structure of interchanges focused on town centres;
  - improved public transport capacity and services in the ULV; and
  - better transport links between the regeneration areas of the ULVand the rest of the London-Stansted-Cambridge corridor, and with Stratford, the Lower Lea Valley / Olympics zone and adjacent parts of Thames Gateway.
- vibrant and sustainable town centres with a good mix of retail and community facilities.
- improved community infrastructure and services including investment in schools and colleges, inadequate and inappropriate health facilities, and new sport, leisure and cultural facilities.
- improved waste management.
- better access to open space, especially in poorer areas and particularly the ULV.
- a modest level of public sector leverage to support the physical infrastructure in suburban areas.


Upper Lee Valley
– Development of strategic sites
– Environmental quality incl. waste recycling, improved open space, public realm
Transport
– North Circular Road and orbital public transport
– WARME, other public transport improvements in the ULV
– 'Hub & spoke' at interchanges, town centres
Investment in Infrastructure
Town Centres
– Intensification - mixed use development incl. housing
– Leisure & cultural amenities
Drivers of Growth
– Improved orbital routes
– Better public transport links to ULV regeneration areas, LSCP Corridor, Stratford, Thames Gateway

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.					
NORTH LONDON PRIORITY AREA: UPPER LEE VALLEY					
North London SREDIP Key Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Develop a new vision for the Upper Lee Valley with the Lee Valley Regional Park and the waterways at its heart. Develop a detailed action plan; have it agreed by the partners; and agree the form of the partnership to take this forward and implement it.	Promote sustainable growth and economic development	Proposed Actions: 1A; 2B	Vision agreed by the three ULV Councils and partners – by December 2006 Delivery Plan agreed by partners – December 2006	NLSA* LB Haringey LB Enfield LB Waltham Forest ULV Group NLTF NLL Lee Valley Reg'l Park Authority Thames Water British Waterways	LDA ODPM
Produce an Opportunity Area Planning Framework based on the vision for the ULV which is agreed by the three local authorities and the primary stakeholders and which provides added value to the Area Action Plans to be produced by the boroughs as part of their Local Development Frameworks – eg. with respect to transport improvements.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development Deliver healthy, sustainable, high quality communities and urban environments	Proposed Actions: 1A; 1E; 2B; 2,E2; 4D/E	Agreed by all three boroughs – by July 2007 OAPF adopted by Mayor as SPG – by June 2008	GLA* NLSA LB Haringey LB Enfield LB Waltham Forest ULV Group NLTF	GLA ODPM

- = Lead partner(s)

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.

NORTH LONDON PRIORITY AREA: UPPER LEE VALLEY

North London SREDIP Key Priorities for Action	Fit with LDA EDS Objectives	Fit with GLA SRDF Actions	Milestones / Outcomes	Possible partners	Possible resources
Produce a Strategic Flood Risk Assessment for the Lee Valley, linked to the Lower Lee Valley and including the Lee Valley to the north of London in accordance with the ODPM's emerging Planning Policy Statement (PPS) 25.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 4F	Strategic Flood Risk Assessment undertaken – by March 2007	ULV Group* LB Enfield LB Haringey LB Waltham Forest Herts. and Essex County Councils GLA Environment Agency	DEFRA
Agree Area Action Plans for Tottenham Hale, Blackhorse Lane and Central Leaside which are adopted by the respective local authorities.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1A; 2B	Area Action Plans produced, adopted by the three boroughs – by x [month] 200x	LB Haringey* LB Enfield* LB Waltham Forest* ULV Group NLTF GLA, LDA TfL Private developers	ODPM
Undertake physical works to increase access to the Lee Valley Regional Park and other Lee Valley waterways and open spaces.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1A; 2B	Works completed	Lee Valley Reg'l Park Authority* LB HaringeyLB Enfield* LB Waltham Forest* ULV Group British W'ways Thames Water	ODPM

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.					
NORTH LONDON PRIORITY AREA: UPPER LEE VALLEY					
North London SREDIP Key Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
As part of the North London Sub-regional Network Plan, secure support for and implement schemes to improve public (particularly rail) transport along the ULV including links to Stratford and to relieve congestion on the north-south road (A1055) at the M25 interchange and Tottenham Hale gyratory.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1A; 2E2	Transport improvements implemented	TfL* NLSA NLTF LDA	TfL
Develop a sub-regional policy on recycling, particularly focusing on the ULV.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1F; 4B	North London Joint Waste Development Plan Document agreed by the contributing boroughs – by 200x	NL Waste Authority* comprising NL Boroughs Plus LBs Camden, Hackney, Islington	NL Boroughs Plus LBs Camden, Hackney, Islington

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.					
NORTH LONDON PRIORITY AREA: TOWN CENTRES					
North London SREDIP Key Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Provide knowledge and resources, including training, for Council members and officers to support the development of sustainable, economically viable urban features and landscapes, with a focus on town centres.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 4A	Training provided – throughout 2006 No. of Councillors attending training	NLSA* NL Boroughs	NLSA
Establish a Sub-regional Town Centres Development Forum whose role would include: • exploring the creation of a sub-regional approach to the development of town centres which takes account of the retail growth potential and the need for a sustainable synergy with provision for residential intensification and office accommodation, and leisure and cultural facilities which are family-friendly, all having improved access to the transport network. • exploring the threats and opportunities of development at Brent Cross and Stratford on North London's town centres. • Developing shared strategies for facilitating the evolution of out-of centre retail parks into more sustainable forms of land use.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1A; 2A	Sub-regional Town Centres Development Forum established – by December 2006 Sub-regional approach explored through eg. studies, visits, specialist groups Threats and opportunities of Brent Cross, Stratford explored Report published by December 2007	NLSA* NL Boroughs NLTF NLL Town Centre business groups and reps NL Voluntary Sector Forum	LDA GLA

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.

NORTH LONDON PRIORITY AREA: TOWN CENTRES

North London SREDIP Key Priorities for Action	Fit with LDA EDS Objectives	Fit with GLA SRDF Actions	Milestones / Outcomes	Possible partners	Possible resources
Produce Supplementary Planning Guidance (SPG) for the development of Wood Green town centre.	Promote sustainable growth and economic development	Proposed Actions: 1A; 2B	SPG completed and approved – by December 2006	LB Haringey * Haringey City Growth Board Wood Green Retailers Steering Group / Mall Corp.	LB Haringey ODPM (LEGI)
Continue redevelopment of Walthamstow Town Centre, including: • development of the Arcade site for mixed-use scheme including leisure, retail and housing. • preparation of a framework for the regeneration of the South Grove area, to include new shops, homes and community facilities.	Promote sustainable growth and economic development	Proposed Actions: 1A; 2B	Determine planning application – by December 2006 Framework developed and agreed – by December 2006	LB Waltham Forest	
As part of the North London Sub-regional Network Plan, secure support for and implement schemes to provide a coherent structure of town centre interchange improvements.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1A; 2E2	Programme adopted within TfL spending Plans – by December 2006 Transport improvements implemented	NLTF* NL Sub-regional Town Centres Development Forum TfL	TfL

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.					
NORTH LONDON PRIORITY AREA: GROWTH DRIVERS					
North London SREDIP Key Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Work with partners in London and national government to develop a specific North London freight policy which includes using low cost, sustainable transport solutions for moving goods into, out of and across the sub-region.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 2.E3; 4F	Freight policy agreed with NLSA leaders and TfL % of goods moved by waterway and rail	NLTF* NLL NL Chamber of Commerce Brimsdown Freight Quality P'ship **TfL**	TfL
As part of the North London Sub-regional Network Plan: • develop sub-regional proposals for improvements along the North Circular Road to support sustainable growth of the M1 Corridor. Work jointly with the West London Partnership to campaign for North Circular Road improvements to open up accessibility to growth areas. • identify intermediate proposals for new transport improvements, eg. light rail. • agree with TfL a transport strategy for the period 2011-2026.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 2.E2; 2.E3; 2.E4	Joint working with West London Partnership Proposals agreed by boroughs and TfL Proposals submitted to TfL Strategy agreed with NLSA leaders and TFL – by June 2007	TfL* NLSA NLTF West London Partnership NLTF* TfL* NLSA / NLTF	TfL

Investment in places and infrastructure – to accommodate growth and ensure sustainable communities and enterprises in London.					
NORTH LONDON PRIORITY AREA: GROWTH DRIVERS					
North London SREDIP Key Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Produce a Development and Investment Framework which identifies the community (eg. health, housing, education and leisure) infrastructure needs of North London and considers the resources required to meet these needs.	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development Deliver healthy, sustainable, high quality communities and urban environments	Proposed Actions: 1D; 1E	North London Development and Investment Framework agreed by boroughs, LDA, GLA, GoL	LDA* LB Enfield LB Haringey LB Waltham Forest ULV Group PCTs NHS LIFT NL LSC NL Voluntary Sector Forum? GLA GoL	ODPM
Obtain planning approval for Cricklewood / Brent Cross, which ie expected provide just over 5,300 new homes and up to 10,000 new jobs.	Promote sustainable growth and economic development Deliver an improved and effective infrastructure to support London's future growth and development	Proposed Actions: 1A; 2B	Planning approval given	LB Barnet	

Investment in people – to improve economic inclusion and enable all Londoners to fulfil their potential.

NORTH LONDON CONTEXT

Deprivation

An analysis of the most deprived wards and lower-level Super Output Areas (SOAs) according to the ODPM's Index of Multiple Deprivation highlights a major east-west split in the sub-region, with a concentration of SOAs in the ULV, eastern Haringey, southern Waltham Forest and to a lesser extent the Edgware corridor classified as the among the most deprived 20% in the nation. The ULV in particular contains the highest concentrations of social housing, low income households and economic inactivity, and the lowest levels of education achievement, poorest health and greatest overall deprivation. These pockets of deprivation are also the areas where the greatest population increases are projected to take place.

Although the number of North London residents of working age claiming benefits (Jobseekers Allowance, Income Support as Lone Parents or Incapacity / Disablement) has decreased over the last 10 years (1995-2005), nearly one in seven (14%) is currently claiming such benefits – just above the London average. But the proportion varies between boroughs, being 14% in Enfield, 15% in Waltham Forest but rising to 18% in Haringey; the rate in Barnet is well below that for North London at 10%.

Analysis of claimants by wards and SOAs at August 2004 (with the working age population based on the 2001 Census) highlights the extremely localised nature of deprivation in North London: the proportion of claimants in the Barnet wards of Colindale and Burnt Oak is nearly twice the low rate for Barnet as a whole, at 18% and 19% respectively. In Enfield, Edmonton has the highest proportion of claimants (25% in Edmonton Green, 22% in Lower Edmonton and 21% in Upper Edmonton). Northumberland Park has the highest rate in Haringey and in the whole of North London at 31%. Other high rates are found in Tottenham (Tottenham Green and Tottenham Hale, both 25%, and Bruce Grove, 24%). In Waltham Forest Leyton (20%), Cathall (20%) and Highgam Hill (18%) have the highest rates.

At SOA level extremely high rates can be found even in wards which have a rate roughly the same as or even below the borough rate. For example, one SOA in Brunswick Park, Barnet, has a rate of 29% - three times the rate for the ward as a whole and the borough. A similar situation occurs in Edgware ward (where one SOA has a rate of 31%, compared to 10% for the ward as a whole) and Golders Green ward (a rate of 26% for one SOA compared to 9% for the ward as a whole). In one SOA in Chase ward, Enfield, 27% of working age residents are claiming benefits compared to 14% for the ward as a whole, while in Southgate Green – a ward with a rate well below that for the borough as a whole (11%), the rate in one SOA is also 27%. In Haringey one SOA in Hornsey ward has a rate of 36% and one in Woodside ward 32% compared to 19% for each of these wards as a whole. Finally in Waltham Forest, Valley ward (14%) has one SOA with a rate of 30%, while one SOA in Hale End and Highgams Park (25%) has just over twice the ward rate of 12%.

In all four boroughs, however, the number of working age people claiming sickness- or disability-related benefits has risen significantly since 1995 – with the largest proportionate increases in Enfield (38%), Barnet (41%) and Haringey (41%) compared to the rises in Waltham Forest (29%) and London as a whole (27%).

Population profile

The population of North London is **ethnically diverse**: 30% come from minority ethnic backgrounds – almost exactly the same as the London average. Major BME communities include Indians, Pakistanis, Black Caribbeans, Black Africans and Irish. They are concentrated in different parts of the sub-region, eg. Irish in Central Haringey, Palmers Green and western Barnet; Indians in most of Barnet and southern and western Enfield; Pakistanis in southern Waltham Forest; Black Caribbeans and Black Africans in eastern Enfield, eastern Haringey, and southern Waltham Forest, although Black Africans are a significant proportion of the population in western Barnet as well. The non-white population now represents 33% of those who are of working age (same as the London average), with the younger population especially diverse – 40% of those aged 16-24 are none-white. Haringey and parts of Enfield and Waltham Forest also have significant numbers of refugees and asylum seekers.

Employment and Worklessness

Among North London's white population the working age employment rate is 72%, although this varies from 74% in Barnet and Waltham Forest to 69% in Haringey). The participation rates of non-white population groups, however, is not converging with average employment rates – the average for non-white groups being 16 percentage points lower at 56% (similar to the London average) - varying from 62% in Barnet to 48% in Haringey. Lowest employment rates in the sub-region are for Black / Black British living in Barnet and in Haringey (31% and 37% respectively. Generally over the last 10 years Barnet and Enfield have experienced employment rates which are slightly better than the London average, while Haringey and Waltham Forest have lagged below the London average. But, given gains and declines over the period, all four boroughs remain almost exactly at the same rates of employment as they had 10 years ago.

Some 12% of North London residents – nearly 80,000 people – are unemployed and want to work (a similar proportion as for London as a whole). A further 22% - 146,900 – are classified as "inactive" (ie. might not be sufficiently actively looking for work or may face an obstacle to starting work immediately). As Haringey and Waltham Forest have low employment rates, they therefore have much larger economically inactive populations (28% and 24% respectively compared to Barnet (18%), Enfield and the London average (both 19%). Statistics on unemployed claimants published recently by North London Learning & Skills Council (LSC) indicate that in North London wards the unemployment rates are particularly high for those aged 19 and under. In 2001 over one in four children under 5 (26%) were living in a household with no adult in employment.

Lack of accessible and affordable transport, lack of affordable childcare, the 'benefits trap' and language difficulties are among the identified barriers to employment which affect the ability of North London residents to obtain employment, both within the sub-region and in the growth areas adjoining it. These problems must be addressed if North London is to reduce the level of worklessness in the sub-region.

Health

As with other factors, North London is an area of contrasts in terms of health, with significant differences in life expectancy between different parts of the sub-region. For example, life expectancy for men differs by nearly eight years between wards in Haringey. Inequalities in the health status of the population in part reflects the impacts on the health of those individuals with low educational attainment and/or who are unemployed, which in turn makes it more difficult for them to engage in the local and regional economy. The 2001 census shows the percentage of households containing people with a limiting long-term illness, health problems or a disability, at 30.2%, is slightly higher than the average for Greater London (29.6%). North London also has a growing resident population of 0-5s, young people and older people who will have particularly high healthcare needs.

Educational achievement

Educational achievement in North London is slightly below the average for England and for London as a whole. Statistics just published by the DfES (Jan 2006) show that while educational attainment levels have generally been increasing in each of the four North London boroughs, only Barnet has a higher proportion of 15-year-olds achieving 5+ GCSE (or equivalent) A*-C passes (63.1%) than the England average (56.3%) in 2005, while pupils aged 15 in Enfield scored just below the England average (at 51.5%). Pupils aged 15 in Waltham Forest scored significantly lower at 48.9% and 47.6% respectively. Educational attainment levels also vary significantly between wards within boroughs.

Provisional figures for January 2005 indicate that the proportion of pupils in maintained secondary schools in North London who are known or believed to have a first language other than English is 35.1% compared to 32.1% for London as a whole and only 9.1% for England. Haringey has the highest percentage of pupils whose first language is considered not to be English (45%) and Waltham Forest the lowest (31.6%). The situation is much the same for maintained primary schools in North London, with 41.1% of pupils having a first language considered not to be English compared to 37.5% for London as a whole and only 11.7% for England. Again Haringey has the highest percentage of such pupils (52.5%) but Barnet has the lowest (36.8%).

Pupil data from Enfield shows that some previously small ethnic groups have increased dramatically between 2003 and 2005, in particular those from the Congo (148% increase), White Eastern Europeans (136% rise), and Kosovo (up by 112%). The rise in White Eastern Europeans confirms that significant numbers of economic migrants have come from the new EU accession states. If this pattern is repeated in the other North London boroughs, it indicates a very rapidly changing population from the one described in the 2001 Census.

Looking at the achievement of 16- to 18-year-olds, London North LSC has noted a wide gap between those who do well and those who either do not do well or drop out of the education and training system altogether. The latter are generally those who are regarded as the most vulnerable in the labour market, ie. those from certain deprived neighbourhoods; those in or leaving care; young offenders; those with drug problems; those who have been excluded or suspended from school pre-16; and teenage parents). It particularly highlights poor participation, retention and achievement rates across all learning routes for some BME groups and white boys.

Raising standards so that all North London pupils can achieve will be a key contributor to the sub-region's and London's competitiveness. Residents in the more deprived parts of the sub-region in particular will need targeted support to enable them to raise their achievement levels and take advantage of regeneration opportunities.

Skills levels

North London once again shows a concentration at both ends of the spectrum when the skills of local residents are considered. Data for 2004 shows that
"managers and senior officials" is the largest single occupational group in which North London residents are employed. Indeed, exactly 50% of the sub-region's working population is employed in the three professional and managerial occupational categories – only 1% below the London average. However, again this varies by borough: in Barnet 57% of the working population is employed in these groups, while in Waltham Forest only 42% are employed in such occupations. Barnet and Haringey have greater proportions of working age residents qualified at NVQ Level 3 or higher (55% and 50% respectively) compared to the London average (47%), but Enfield and Waltham Forest levels lag significantly behind (41% and 35% respectively).

While the proportion of working age residents with high level qualifications has improved, the proportions of people who are either qualified below Level 2 (or equivalent) or have no qualifications at all has improved only slightly. Data detailing the qualification levels of working age residents over the period 1999-2003 shows that while the proportion with low or no skills has consistently declined in Barnet and Waltham Forest, it varied only slightly in Enfield and was in fact the same in 2003 as in 1999 (47%); in Haringey it rose from 38% in 1999 to 46% in 2003. Only the figure for Barnet (31%) is below the London average of 41%.

This highlights a significant problem for the London economy in general and North London specifically. Forecasts suggest that the majority of the growth in jobs in London's main centres (Thames Gateway and the Central Activity Zone) will require skill levels at NVQ 3 and 4. Therefore, the projected jobs growth will be of little or no benefit to many people in North London, particularly in the ULV.

While raising skills levels to Level 3 is a national priority for the North London LSC, there is a real need in North London to create a series of 'skills ladders' whereby people with low or no skills can develop basic skills in a work-based environment. This development needs to have a pathway through to higher skill levels. However, as North London's economy is dominated by small firms and micro businesses that historically do not, will not or cannot afford staff training and development, this presents a significant problem that will require radical solutions.

Preparation for the 2012 Olympics is seen (potentially) as providing a much needed motivator for the many young people who have become disengaged from education and employment to gain skills and for others to enhance their skills. Opportunities are expected to be principally centred around construction, leisure, tourism and hospitality, transport, manufacturing and retail, and also volunteering.

As noted above, job opportunities will also be available in the other internal and external growth areas impacting on the sub-region. To ensure North London residents can take advantage of these opportunities direct links will need to be made with employers: the evidence from regeneration initiatives indicates that the benefits of growth don't necessarily trickle down, and that training alone is not sufficient to enable people to access jobs.

In November 2003, the LDA and the Upper Lee Valley matrix group published an employment and skills prospectus to provide a guide to commissioning under the Single Programme fund. A review of this prospectus will be undertaken as part of the work programme to develop and implement the new vision for the ULV.

Affordable housing

The shortage of affordable housing to buy or rent is both a social problem and a constraint on economic competitiveness.

Office of National Statistics data shows that the average earnings for full-time employees in North London in April 2003 was some £26,600 p.a. while the average price of houses in North London in the period January – March 2003 was nearly £219,200. The Health Service and the education sector are among the major public sector employers in the sub-region, and recruitment and retention of skilled staff is therefore a significant issue. A more appropriate housing mix is also needed, particularly to meet the demand for larger family units.

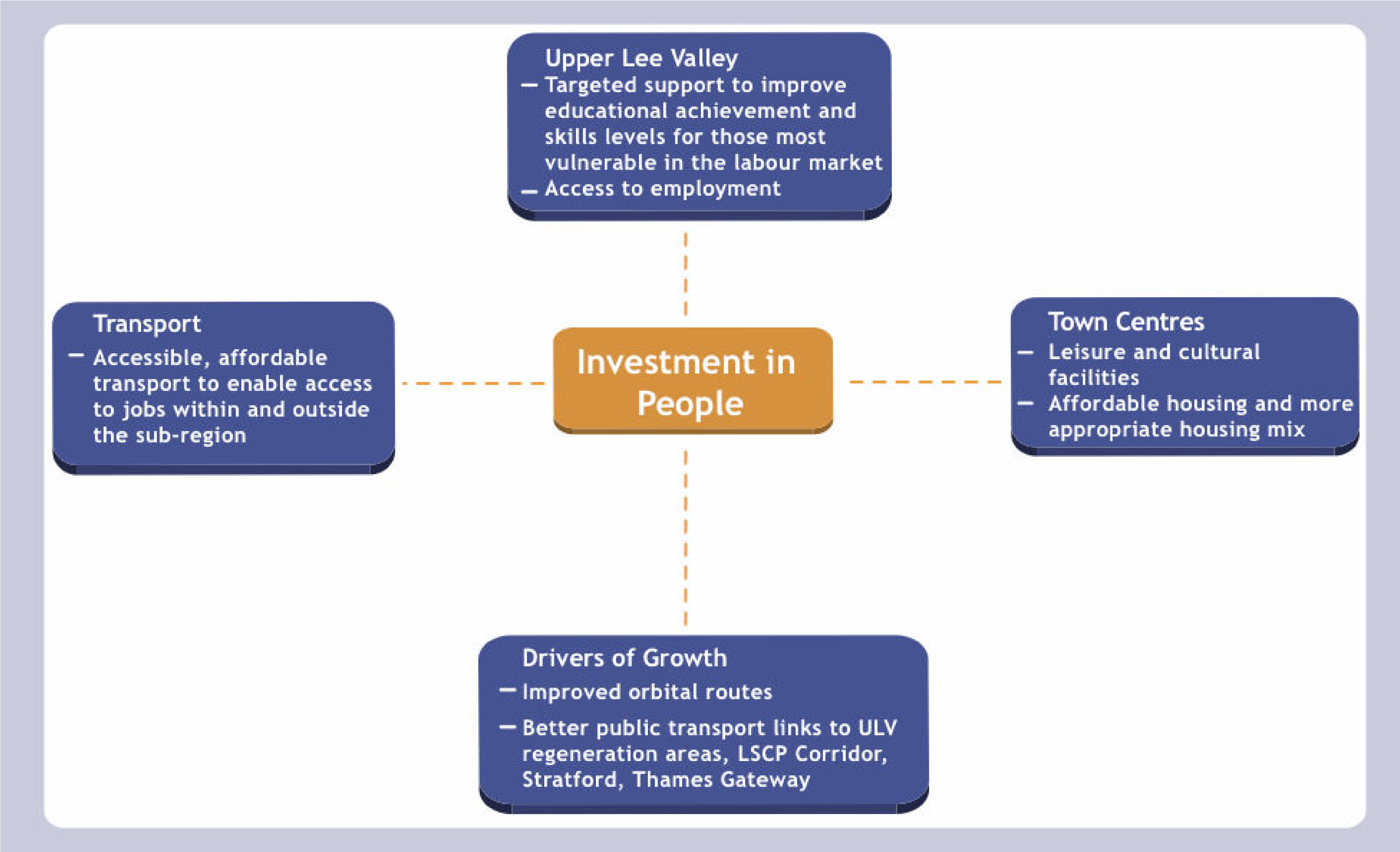
As noted above, a new partnership is being developed for the Upper Lee Valley which will be creating a new vision for the ULV. This vision will focus on the waterside and regional park as key features at the heart of an attractive mixed-use area where people can live and businesses can grow , with provision of starter units and a range of housing types including high-value waterfront properties. This vision will be developed through 2006 to provide a focus for the Opportunity Area Planning Framework (OAPF) which the GLA family, NLSA and partner boroughs will jointly produce.

SUMMARY OF KEY ISSUES / PRIORITIES

The previous section has highlighted the considerable opportunities for mixed use development in the Opportunity Areas of North London – with the potential to transform the ULV and Cricklewood and create substantial numbers of new homes and jobs. Both internal and external growth areas provide new opportunities for local people to access jobs.

But to do this, North London needs:

- targeted support to improve educational and skills levels of those most vulnerable in the labour market, particularly those in the most deprived areas of the sub-region (the ULV, parts of the Edgware corridor).
- a co-ordinated approach from education and training providers working with employers to provide work-based training programmes to raise the skill levels of the workforce.
- the larger employers (especially the public sector) to work with suppliers and contractors to promote local employment.
- effective transport connections to jobs, both in internal and external growth areas.
- well-designed, more affordable housing and more larger family units.
- a range of other targeted actions to reduce inequalities and enable social inclusion.


Upper Lee Valley
– Targeted support to improve educational achievement and skills levels for those most vulnerable in the labour market
– Access to employment
Transport
– Accessible, affordable transport to enable access to jobs within and outside the sub-region
Investment in People
Town Centres
– Leisure and cultural facilities
– Affordable housing and more appropriate housing mix
Drivers of Growth
– Improved orbital routes
– Better public transport links to ULV regeneration areas, LSCP Corridor, Stratford, Thames Gateway

Investment in people – to improve economic inclusion and enable all Londoners to fulfil their potential.					
NORTH LONDON PRIORITY AREAS: UPPER LEE VALLEY					
North London Implementation Plan Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Improve the employment rate of ULV residents over each economic cycle by: • increasing the educational attainment rates and skill levels of ULV residents to be in line with the North London average – by 2009. • ensuring that ULV residents are aware of and can take advantage of the job opportunities available in internal and external growth areas. • the larger employers (especially the public sector) working with contractors and suppliers to promote local employment.	Tackle barriers to employment Address the impacts of concentrations of disadvantage Reduce disparities in labour market outcome between groups	Proposed Actions: 3A; 3B	GCSE results NVQ levels Ongoing liaison between partners Creation of direct links to relevant construction companies and firms in the growth areas	NL LSC* FE Colleges NL Boroughs JobCentre Plus Middlesex Univ Urban Futures	DfEE LSC ESF NRF

<table>
<tr><th colspan="6">Investment in people – to improve economic inclusion and enable all Londoners to fulfil their potential.</th></tr>
<tr><td colspan="6">NORTH LONDON PRIORITY AREAS: GROWTH DRIVERS</td></tr>
<tr><th>North London Implementation Plan Priorities for Action</th><th>Fit with LDA EDS Objectives</th><th>Fit with GLA SRDF Actions</th><th>Milestones / Outcomes</th><th>Possible partners</th><th>Possible resources</th></tr>
<tr><td>Ensure North London residents are aware of and can take advantage of the job opportunities available in internal and external growth areas by:</td><td>Tackle barriers to employment

Address the impacts of concentrations of disadvantage

Reduce disparities in labour market outcome between groups</td><td>Proposed Actions:
1A; 3A; 3B</td><td></td><td></td><td></td></tr>
<tr><td>• undertaking a mapping exercise to fully understand the employment opportunities within the growth areas and create specific programmes to take advantage of these.</td><td></td><td></td><td>Mapping exercise completed and results distributed</td><td>NL LSC*
NLSA
Urban Futures</td><td>NLSA</td></tr>
<tr><td>• improving the skills and qualifications of North London residents and creating direct links with employers to facilitate access to jobs, particularly in construction, retail, and leisure.</td><td></td><td></td><td>Training programmes in place
Direct links with employers made</td><td>NL LSC*
FE Colleges
JobCentre Plus
Middlexex Univ
Urban Futures</td><td>LSC
ESF
NRF</td></tr>
<tr><td>• creating a sub-regional Olympics Group to co-ordinate work in sport, transport, business and skills to secure maximum benefits for North London.</td><td></td><td></td><td>No. of meetings

Attendance of stakeholders</td><td>NLSA*
NL Boroughs</td><td>NLSA</td></tr>
<tr><td>Explore the impact of immigration / economic migration and diversity on the North London economy – particularly in the ULV.</td><td>Tackle barriers to employment

Address the impacts of concentrations of disadvantage

Reduce disparities in labour market outcome between groups</td><td>Proposed Actions:
3A; 3B</td><td>Research completed and report published</td><td>NLSA*
Middlesex University
CRE
ALG</td><td>LDA
NLSA</td></tr>
</table>

Investment in enterprise – to enable enterprise growth and competitiveness

NORTH LONDON CONTEXT

Employment

North London has almost 40,000 businesses employing more than 300,000 people. It is primarily a small business economy, with fewer large corporates than London as a whole and a greater reliance on public sector employment. The sub-region generally contains a significant proportion of high skill workers and a relatively large number of self-employed people.

About 8% of London's employment is located in North London. The London Plan anticipated that 26,000 new jobs would be created in North London in the period between 2001 and 2016 – only 4% of the London-wide total. But more recent projections feeding into alterations to the London Plan indicate that if the forces underlying historic trends are not addressed, employment growth may be significantly less – possibly a net growth as low as 9,000 additional jobs.

Job growth varies significantly across the sub-region, with Barnet (the only North London borough projected to grow more strongly than London as a whole) looking at the sixth highest growth rate in London, while in Waltham Forest jobs are projected to decline more sharply than anywhere else in London.

However, with appropriate intervention, the NLSA and its partners believe that they can counter the historic trends. The key to achieving a more sustainable balance between the growth of North London's population / workforce and employment growth in the sub-region will be in realising the potential of internal drivers of growth – including the Opportunity Areas (Cricklewood / Brent Cross, Tottenham Hale and the ULV; Wood Green Metropolitan centre (with Haringey Heartlands); and other town centres with intensification potential (including for SME growth) – along with improved transport accessibility, particularly orbitally. The latter is crucial if local people are to access jobs within the sub-region and also in external growth areas.

Local Economy

Manufacturing

The ***Upper Lee Valley*** is one of largest clusters of manufacturing and technology-led industrial estates in London. It helps broaden London's economic base and provides employment for nearby, often deprived communities (London Plan). It has several development sites where high quality renewal, including modernising estates and improving transport, will enable key anchor firms to be retained and encourage new business growth. Innova Park, at the northern end of the ULV, should provide a focus for growth of new knowledge-based industry including new media and ICT.

The ULV also has opportunities to benefit from its closeness to Stansted Airport given a suitable pattern of rail services and is a key part of the London-Stansted-Cambridge-Peterborough growth corridor.

As previously described (see 'Investment in People'), a new vision for the ULV will be developed during 2006 that will set the waterways and regional park as the focus for a range of high-quality mixed of employment and residential uses which enable businesses and people to develop and grow.

Tottenham Hale, at the southern end of the ULV, is the second Opportunity Area in North London. A well-established manufacturing area, it is considered to be able to accommodate higher density development and to become the main service area focus for the sub-region.

Other ***Preferred Industrial Locations*** within the ULV cited in the London Plan are Brimsdown, Central Leaside Business Area, Freezywater and Blackhorse Lane, as well as Lea Bridge Gateway in Waltham Forest, which, at the southern part of the ULV, forms an important link with the Lower Lea Valley. Other key employment and enterprise zones which the North London boroughs regard as significant for enterprise growth and competitiveness of the sub-region include Leyton Temple Mills in Waltham Forest.

Although manufacturing employment has declined in the sub-region, other occupiers of industrial land help offset this decline. Some are seen as indirectly of significance to the wider London economy, eg. waste, logistics and transport-related activities. Indeed while some logistics may be an activity in its own right, much of it should be considered an ancillary activity to manufacturing, eg. in food and drink.

As noted above (see ‘Investment in Infrastructure’), the London Plan suggests that too much industrial land is safeguarded for employment uses in North London and that 100 ha. of industrial land could be released for other uses. However, the NLSA considers that a more ‘monitor and manage’ approach should be taken, relating existing and future demand to supply in local circumstances and leading to such actions as reconfiguring specified areas and securing mixed-use redevelopment where justified and appropriate.

In November 2003, the LDA and the Upper Lee Valley matrix group published a business development prospectus to provide a guide to commissioning under the Single Programme fund. A review of this prospectus will be undertaken as part of the work programme to develop and implement the new vision for the ULV.

Retail and office

The third Opportunity Area – Cricklewood / Brent Cross – is set to become an integrated town centre with a range of uses and services and major office development, taking account of its key location in the emerging M1 corridor. Again as noted above (section on ‘Investment in Infrastructure’), it had, in 2001, the fourth largest comparison goods retail expenditure in London outside the West End and, if development proposals are implemented in line with strategic policy, is projected to become the sixth largest retail centre in London in respect of turnover.

Original London Plan projections indicate modest expansion in office floorspace in North London as a whole in the period to 2016. Haringey and Waltham Forest have very small office markets which primarily provide local services, while more active markets exist in Barnet and Enfield. Demand is seen as more likely to come from back-office functions for professional and financial service firms and from services to meet sub-regional and local needs, likely to be located in or near town centres, although some highly accessible suburban office locations are also regarded as having long-term potential for enhancement or expansion. There is also some evidence that logistics areas (such as Park Royal in West London) can develop additional office jobs as companies co-locate ‘head office’ functions on higher quality industrial sites.

Key sectors

North London has above London average employment in the wholesale and retail trade, manufacturing and public services but fewer jobs in London's key growth sectors, with only around 6% of all the capital's jobs in financial and business services.

Key sectors for the sub-region (identified by Locum Destination Consultants, North London Product Review, 2004) are:

Manufacturing – still a major employer in North London and an important part of London's economy. The distribution sector – and particularly logistics – is also a vital part of the London economy. The ULV is already and should remain the focus for logistics. Recent analysis of priority sectors within the sub-region (SQW Ltd., November 2005) indicates that the food and drink sub-sector is the only part of manufacture in the sub-region which has actually shown any growth in the period 1998 - 2003, particularly in Enfield, Haringey and Waltham Forest. Retention of manufacturing businesses is seen as an important priority for North London to preserve the diversity in the economy of the sub-region and London generally.

Creative Industries – are already clustered in Wood Green and to a lesser extent in Tottenham (with a mixture of small businesses, many BME-led), North Finchley and Walthamstow Town Centre. Printing and publishing is a significant employer, prominently located along major 'Industrial arteries', particularly within the Lea Valley, around Brent Cross and along the A11. The sector is also very suburbanised, with many "Creatives" 'hidden' in low-key commercial property or in most cases residential accommodation. Recent analysis of the sector has identified the need for it to be more diversified, with better connectedness between businesses and collaborative, rather than sector-based, approaches to change.

Retail and leisure – need to be developed further (noting the GLA study of retail growth potential referred to in the draft SRDF) as market interest already exists and these sectors offer entry-level employment opportunities and particularly jobs for residents from BME communities. To be located mainly in and around town centres including the expanded Brent Cross. Barnet, Enfield and Waltham Forest have all shown quite strong retail growth over the period 1998 - 2003.

Office-based and Knowledge-intensive Services (especially the public sector) – remains a key sector for economic development. London's position as a world centre for finance and business services is not reflected by the current low presence of such activities in North London. Barnet is likely to be the main focus for this. Public sector employment has expanded and represents the largest single sector for jobs in the sub-region. As a significant source of knowledge-intensive employment, and also a major purchaser of goods and services, it has great potential to positively affect the local economy, especially in the more deprived parts of the sub-region. Health and education services in particular are expected to grow in line with the population growth. Healthcare has shown strong growth in Enfield and quite buoyant growth in Waltham Forest between 1998 and 2003.

Construction – has also been identified as a key employment sector for North London (North London LSC) given the growth areas within and outside the sub-region. The Construction Web network partnership, managed by Urban Futures Ltd., promotes employment and training in the construction industry for North London residents by working with local construction businesses to hire local labour for strategic sites in the ULV. A feasibility study is nearing completion for a Construction Academy based in Waltham Forest, building on opportunities associated with the 2012 Olympics and also Stratford City and other local developments.

'Green technologies' – and associated industries will be an increasingly important sector with the increasing emphasis on waste management and the introduction of challenging borough targets for reducing waste. The opportunity to develop green technologies will be considered as part of developing the ULV vision.

Small and medium sized companies

SMEs are strongly represented in the North London economy, with 89% of firms employing 10 people, most of these being micro businesses (those employing less than 5 people). Indeed North London has a higher proportion of SME and micro businesses to overall business presence than any of the other sub-regions. Barnet has the highest proportion (80%) of micro businesses, followed by Haringey (72%), Enfield (73%) and Waltham Forest (72%). A significantly higher proportion of firms are owned by sole proprietors than the London average, while the proportion of private limited companies is lower than the London average (although these account for the majority of firms in North London). All four boroughs also have less than the London average of social enterprises (ranging from 1% in Enfield and Haringey to 3% in Waltham Forest compared to 6% for London as a whole).

Nearly 50,000 people are self-employed – 13% of the total employment in the sub-region (and a similar rate to that for London as a whole and Great Britain). Barnet has the largest proportion of self-employed (20% in 2004/05 compared to the London average of 15%). Enfield and Waltham Forest also have a higher proportion of self-employed than the London average (19% and 17% respectively), while in Haringey the proportion of self-employed is the same as for London as a whole.

While there is a high birthrate, there is also a high failure rate: in 2003 all four boroughs recorded business VAT registration rates of over 10% (ranging from 11.5% in Barnet to 14.2% in Waltham Forest). However, de-registrations were high, with Barnet losing 740 businesses and Enfield losing 130 businesses. These were only slightly offset by gains of 15 businesses in Haringey and 75 businesses in Waltham Forest. A key need is for premises that would not only allow SMEs to establish themselves but also to grow, and in particular a need to foster such businesses within the BME sector.

Business advice and support

Business advice and support is regarded as 'patchy' across North London. While multiple providers exist, the key problem identified by the business sector itself is the lack of a single clear gateway, even at the individual borough level.

However, a key finding of the 2004 London Annual Business Survey is that micro businesses (which are a much larger proportion of total businesses in North London) tend to rely on informal methods and processes of management, are less likely to use external advisers or have business, sales, marketing or training plans – seen as important requirements for a successful business - than the rest of the business community. This is borne out locally in a recent survey of businesses in Haringey which showed that firms turn to the private sector (accountants, bank managers, solicitors) and business contacts for business advice, with local business support agencies having relatively low levels of market penetration. SMEs and BME businesses in particular need advice and support to be able to tap into informal networks to develop.

The London Annual Business Survey and the Haringey survey also indicate that while businesses in the sub-region have strong local ties, they have weak extended ties, and also need advice and support to be able to trade in wider networks. The Haringey survey noted that this is particularly true for SME, micro and BME businesses. Businesses in North London will need support if they are to take advantage of the opportunities available in internal and external growth areas and secure contracts to supply goods and services there, eg. the Olympics zone, Cricklewood/Brent Cross.

Skills levels and shortages

As noted in the previous section, the skill levels of North London's residents span the whole spectrum: 50% are employed in professional and managerial occupation. While proportion of working age residents with high level qualifications has improved, the proportions of people who are either qualified below Level 2 (or equivalent) or have no qualifications at all has improved only slightly. Some 40% still do not posses a Level 2 qualification or equivalent (worse than the London average). Analysis suggests that those in higher-level occupations who live in North London are more likely to be commuting out of the area to work, with those in lower-level occupations being more likely to remain working in the sub-region.

Nonetheless, skills shortages do not appear to be a major problem for employers in North London at the present time. The National Employer Skills Survey 2003 estimated that 2% of businesses surveyed in North London were facing vacancies due to a skills shortage (ie. applicants lacked the required skills, the level of work experience and/or the qualifications the company sought). This compared to 3% for London as a whole and 4% for England as a whole. However, when skills shortage vacancies are considered as a proportion of overall employment, North London's position (0.5%) is virtually on a par with that of London as a whole (0.5%) and England (0.6%).

The survey went on to look at skill gaps (where some staff are considered to not fully meet the requirements for the job). An estimated 9% of jobs in North London suffered from an internal skills gaps, compared to 10% for London as a whole and 11% for England as a whole. This suggests that workforce development is needed as well as improving the quality of entrants into the sector. The problem is particularly acute among firms with 25 employees or less (which reported 61% of all skill shortage vacancies and 45% of whose staff were regarded as lacking appropriate skills).

The smaller firms are also those least likely to have a training plan or training budget in place. The Survey found that only 33% of North London businesses had a training plan in place, compared to 36% for London as a whole and 39% for England as a whole; and an even lower proportion, 26%, had a training budget, compared to 30% for London as a whole and 31% for England as a whole. Nearly half (46%) of the smallest firms surveyed lacked both.

At the time of the survey the majority of vacancies reported were for lower skilled jobs. However, the occupational structure of employment is projected to increase in favour of professional, associate professional and technical personal staff and certain managerial occupations, driving up skill demands and making it even more vital that more North London residents – particularly those from BME communities and other groups disadvantaged in the labour market – can increase their levels of qualification attainment.

These issues have been recognised in London North LSC's latest Annual Plan (2005-6). It includes as a regional priority making its provision "truly demand-led so that it better meets the needs of employers, and transforming further education so that it can attract and stimulate more business investment in training and skills".

Lessons from the Haringey City Growth Strategy may serve as a model for developing a North London strategy for business growth. Based on work developed in the United States, the Haringey City

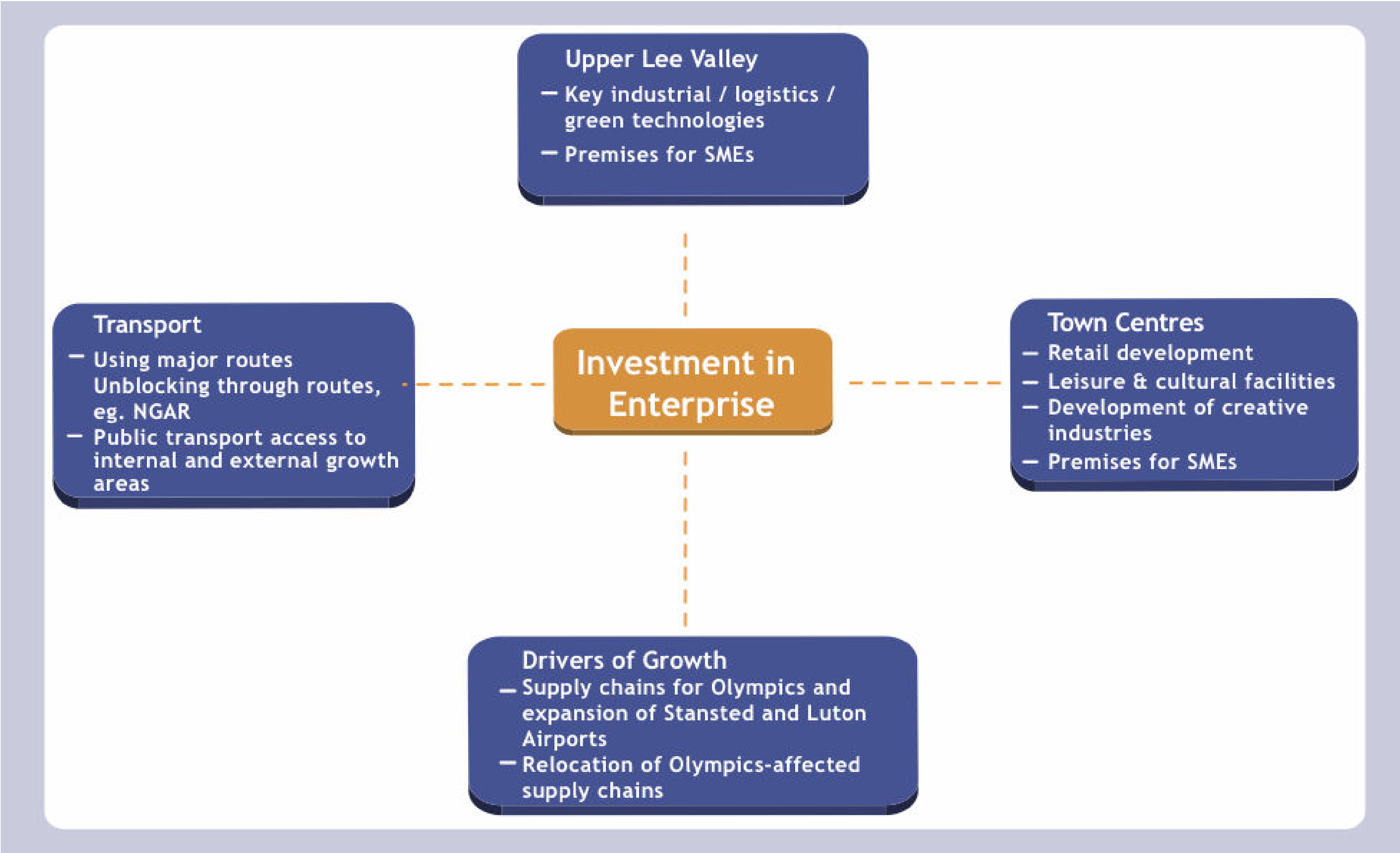
Growth Strategy uses a four-stage approach which involves (a) quantitative analysis of the economic base using national databases; (b) qualitative survey of local firms to understand, for example, their aspirations, networks, views of the borough; (c) a business board to drive strategy development, and finally (d) implementation of the priorities. The Strategy is being driven by a business-led partnership (Haringey City Growth Board) that focuses on developing identified key clusters, better links to local communities, better business-to-business communication, and improving links between the public and business sectors. The results of the model are currently being evaluated, but the intention is to share the lessons with other North London boroughs to develop a similar programme across the sub-region.

In the meantime, development of this approach is the basis of Haringey's Local Economic Growth Initiative (LEGI) bid for funds from the Office of the Deputy Prime Minister (ODPM). Haringey's bid aims in particular to boost and develop a culture of local entrepreneurial activity starting with primary school children; reduce business failure rates through reform of business support activity; provide support to local business to explore new markets outside the locality; and improve workspace provision. In North London only Haringey has submitted a LEGI proposal in the current bidding round. However there is scope for Enfield and Waltham Forest to submit bids in later rounds. The NLSA, North London Ltd. (NLL) and partners will be considering the submission of a joint North London proposal.

SUMMARY OF KEY ISSUES / PRIORITIES

Population growth is set to outstrip employment growth unless "the forces underlying historic trends" are addressed. North London has identified opportunities to counter the "historic trends" and support enterprise growth and competitiveness, but to do so it needs to:

- realise the potential of its internal drivers of growth – the Opportunity Areas, Wood Green Metropolitan centre and other town centres with intensification potential.
- improve transport accessibility – particularly orbital routes.
- focus on retaining and enabling the growth of manufacturing businesses, particularly in the ULV, and supporting growth in other key sectors of the local economy, ie. the creative industries, retail and leisure, office-based services, construction and 'green technologies'.
- provide more affordable premises for SMEs – not only for start-ups but for those that are seeking to expand.
- provide clear and simple pathways to access good quality business support especially targeted to the small and micro business sector.
- stimulate more business investment in workforce training and development.
- support increased qualification attainment of local residents to improve the quality of employees at entrance level and enable them to access the professional, associate professional, technical and managerial jobs that will increasingly characterise the occupational structure of employment in the sub-region.


Upper Lee Valley
– Key industrial / logistics / green technologies
– Premises for SMEs
Transport
– Using major routes Unblocking through routes, eg. NGAR
– Public transport access to internal and external growth areas
Investment in Enterprise
Town Centres
– Retail development
– Leisure & cultural facilities
– Development of creative industries
– Premises for SMEs
Drivers of Growth
– Supply chains for Olympics and expansion of Stansted and Luton Airports
– Relocation of Olympics-affected supply chains

Investment in enterprise – to enable enterprise growth and competitiveness.					
NORTH LONDON PRIORITY AREA: UPPER LEE VALLEY					
North London Implementation Plan Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Make the ULV a thriving business location and centre of innovation which takes advantage of its key strengths as a communication and distribution corridor and builds on its historical legacy as a place for innovation by: • improving business start-ups. • increasing the number of businesses which stay in the ULV. • creating a range of premises which suit the needs of business, including low- cost / affordable and mixed use.	Maintain London's position as a key enterprise and trading location. Address barriers to enterprise start-up, growth and competitiveness. Retain enterprises in London where economically efficient and feasible.	Proposed Actions:	Net rate of business start-ups No. of businesses retained Annual survey of premises	ULV Group* NLL NL Chamber of Commerce Enfield Enterprise Agency Business Link 4 London	
Undertake research to ascertain the travel-to-work patterns of those who work in the ULV.	Maintain London's position as a key enterprise and trading location. Address barriers to enterprise start-up, growth and competitiveness. Retain enterprises in London where economically efficient and feasible.	Proposed Actions: 3A	Bi-annual survey	NLTF* NLSA NLL NL LSC TfL	

Investment in enterprise – to enable enterprise growth and competitiveness.					
NORTH LONDON PRIORITY AREA: UPPER LEE VALLEY					
North London Implementation Plan Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Develop a coherent strategy for supporting the North London economy and business initiatives, rolling out the approach taken in LB Haringey's City Growth Strategy and LEGI bid.	Maintain London's position as a key enterprise and trading location. Address barriers to enterprise start-up, growth and competitiveness. Maximise the productivity and innovation potential of London's enterprises.	Proposed Actions: 3B	Strategy developed and agreed by the NL boroughs and partners – by 2008.	NLSA* LB Barnet LB Enfield LB Haringey LB Waltham Forest NLL North London NL Chamber of Commerce Urban Futures	
Develop a sub-regional policy on logistics in conjunction with Hertfordshire and Essex County Councils and BAA (re growth at Stansted).	Deliver an improved and effective infrastructure to support London's future growth and development Promote sustainable growth and economic development	Proposed Actions: 1G; 2D	Policy agreed by the three ULV boroughs – by 2008	TfL* LB Enfield LB Haringey LB Waltham Forest ULV Group Hertfordshire, Essex County Councils BAA Thames Gateway Partnership	TfL

Investment in enterprise – to enable enterprise growth and competitiveness.

NORTH LONDON PRIORITY AREA: TOWN CENTRES

North London Implementation Plan Priorities for Action	Fit with LDA EDS Objectives	Fit with GLA SRDF Actions	Milestones / Outcomes	Possible partners	Possible resources
Explore the strengths and weaknesses, roles of North London's town centres including: • ensuring that research is undertaken to determine the value of the evening economy for the sub-region's metropolitan and major town centres.	Maintain London's position as a key enterprise and trading location. Address barriers to enterprise start-up, growth and competitiveness. Retain enterprises in London where economically efficient and feasible.	Proposed Actions: 1A; 1D; 2A	Research commissioned, published – by March 2006	NLSA* Sub-regional Town Centres Development Forum	
• ensuring town centres are primary local and sub-regional centres for a sustainable mix of businesses. ie. retail, leisure, cultural, financial and business services.		1A; 1B; 1C; 2a	No. of jobs in each Employment sector		
• ensuring main and district town centres provide a good mix of leisure and cultural facilities so that more people will choose to spend their leisure time and money in them.		1B; 1D; 2A	TBA Value of the evening economy		
• improving the image and environmental quality of the metropolitan and major town centres to be safe and pleasant places for shopping, leisure and cultural activities and office-based services.		2A; 4A	Citizens' Panel	NLSA	

Investment in enterprise – to enable enterprise growth and competitiveness.					
NORTH LONDON PRIORITY AREA: GROWTH DRIVERS					
North London Implementation Plan Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Ensure that businesses in North London are able to secure high value contracts to supply goods and services to the main growth areas / drivers including the Olympics .	Maintain London's position as a key enterprise and trading location. Address barriers to enterprise start-up, growth and competitiveness. Maximise the productivity and innovation potential of London's enterprises.	Proposed Actions: 3B	Value of contracts secured	NL Chamber of Commerce* NLL Urban Futures LB Haringey LB Waltham Forest	LDA LB Haringey, LB Waltham Forest – Business Brokerage / Trade Local
Develop the potential of cultural industries in North London by: • promoting the development of creative industries in the regeneration of Wood Green, Walthamstow, Edmonton and Brent Cross / Cricklewood Town Centres. • supporting cross-borough work to increase the supply of affordable and acceptable workspaces including incubator units and follow-on units to enable growth.	Maintain London's position as a key enterprise and trading location. Address barriers to enterprise start-up, growth and competitiveness. Maximise the productivity and innovation potential of London's enterprises.	Proposed Actions: 1A, 1D, 2A, 3B	Cultural clusters developed No. and type of workspaces	NLL* 4 Greens Group Creative London North Creative London	LDA Creative London North Creative London

Investment in marketing and promotion – to make sure that what London offers is understood

NORTH LONDON CONTEXT

Identity

Partners in North London are committed to creating a clear sense of identity for the sub-region in order to maximise public and private investment, targeting the strengths of the sub-region.

A key strength of North London's image is its 'quality of life'. Focus group feedback (North London Product Review) identifies North London's key positive features as being:

- Lots of green space
- Cultural diversity and cosmopolitan mix
- Affordable houses in zone 2 with good transport
- Good access to airports – particularly Stansted
- Good bus transport and tube lines
- Roads – with key strategic radial routes (M1, A1, A10)
- Upwardly mobile feel

As noted above (see 'Investment in Infrastructure'), North London is at the heart of growth, being at the confluence of two of the Government's growth corridors – Thames Gateway and London-Stansted-Cambridge – plus the emerging M1/A1 corridor, and in close proximity to the Central Activity Zone. On the other hand, North London is regarded as not yet having developed a reputation as a business destination within London. Focus group feedback indicates it has not managed to overcome its perceived association with 'crime and grime' (North London Product Review). It is also seen as lacking cultural and leisure amenities, although this was largely because those in the focus group who were unfamiliar with North London were completely unaware of many of its cultural and leisure attractions.

The Review recommends that North London further its marketing use of existing large corporates, eg. Merck Sharpe and Dohme, McDonalds, First Banking Group, Pentland, British Telecom. These companies provide a varied and interesting mix of corporate profile and marketing experience / expertise from which to draw when promoting North London's business advantages.

As noted above (see section in "Investment in Infrastructure"), a new vision and sense of identity are particularly needed for the ULV – one which will inspire change, reposition the ULV from being a public sector problem to a private sector opportunity and connect it to developments in the Lower Lee Valley, making use of the Lee navigation canal, the River Lea and reservoirs as focal points for development. This must be a vision which can also inspire the local communities, investors, landowners and funding agencies. The initial stage of developing such a vision is currently taking place as part of an emerging partnership of the three ULV boroughs (Enfield, Haringey and Waltham Forest) with other key stakeholders such as the Lee Valley Regional Park Authority, North London Ltd. (NLL), the North London Learning and Skills Council (LSC), JobCentre Plus, the GLA and LDA.

Attractions

North London has a wide range of attractions. Its prime visitor attraction is the RAF Museum at Hendon. In addition, Alexandra Palace is an iconic landmark and major host to exhibitions and pop concerts. The sub-region also has a rich history, available in museums across North London, including the Church Farmhouse Museum in Hendon, Whitewebbs Museum of Transport and Forty

Hall and Gardens in Enfield, Bruce Castle in Haringey, and the Vestry House in Waltham Forest. It also contains many historic settlements

and individual buildings of exceptional importance, such as the William Morris Gallery in Waltham Forest, many of which have potential to develop a stronger tourism 'offer' and are often in or close to town centres and public transport routes. There is a creative industries cluster in Wood Green and others are being developed in Tottenham, North Finchley and Walthamstow Town Centre.

The Lee Valley Regional Park is also an important strategic asset for North London with its new sports facilities at Picketts Lock in Enfield and the new 'Velopark' at Eastway in Waltham Forest. However, it is a frequently under-used asset which needs to be opened up and made to work as an integral part of the regeneration of the area. The sub-region also contains a number of other significant leisure facilities including Walthamstow Stadium; Tottenham Hotspurs, Leyton Orient and Barnet football clubs; Copthall Stadium, and the Lee Valley Ice Rink in Leyton.

In addition the Lee Valley Regional Park is a haven for wildlife and contains sites of special scientific interest. Other major open spaces in the sub-region include Epping Forest, Trent Country Park, Lee Valley Country Park, Alexandra Park surrounding the Palace, and Highgate and Queens Woods. The Beale Arboretum in Enfield has 10 acres with over 800 varieties of trees and shrubs.

North London also possesses an extensive canal system linked into the national canal network. A number of walks can be done along the River Lee within the Lee Valley Regional Park. In addition, a footpath runs along the New River (a water supply aqueduct rather than an actual river), starting in Hertfordshire and running through Enfield and Haringey to Islington.

The artsdepot in North Finchley is a new purpose-built centre offering a wide range of performing and visual arts. The well-known Chicken Shed Theatre in Enfield aims to presents a variety of productions in its main auditorium and studio theatre and particularly encourages the active participation of those most at risk of exclusion through factors of health, social development or ethnicity. Smaller theatre venues are located at Millfield in Enfield and above the Gate House pub in Haringey.

North London also offers a number of thriving shopping centres, cafes, restaurants and bars - meeting the tastes and demands of a diverse community. These include Mill Hill (Barnet), Enfield Town Centre (Enfield) Crouch End and Muswell Hill (Haringey) and Walthamstow Town Centre (Waltham Forest). The one-mile long Walthamstow Market is the longest market in Europe.

Transport links

Public transport links from Central London and from surrounding areas into North London are very good. The road network has good radial links and is London's gateway to the North. However, some parts of North London are very poorly served by public transport. Improvement of orbital transport connections in particular will be essential in ensuring that tourism benefits spread further across North London and that visitors can reach multiple destinations in the sub-region.

The visitor economy

The Mayor's proposed London Tourism Strategy will seek to promote a wide range of facilities away from Central London.

Increasing numbers of visitors to North London can certainly be expected during the 2012 Olympics. Letyon, at the extreme south of the sub-region, is increasingly becoming an Olympic cluster of new and improved sports facilities that will be used as competition or training facilities in the 2012 Olympics. This includes the site of the Olympic Velodrome. London 2012 has also identified a number of official training facilities in North London including Picketts Lock Regional Athletics Centre in the ULV, due to be completed at the end of 2006. Other local facilities will need considerable investment to bring them up to world class standard. At the same time, the LDA has identified North London as having a significant deficit of sports facilities, and there is a strong case for investing in better facilities to help deliver the best Olympics and to provide a long-term legacy for local people.

North London currently has only 3% of London's visitor accommodation stock, and this is used largely by business people and visiting friends and family. An LDA report on "Encouraging the supply of visitor accommodation across London" (2004) noted that some hotels in the sub-region report very high occupancy rates.

Given its proximity to Central London, its transport accessibility to Stansted Airport, the fact that it will be next door to a major visitor event – the 2012 Olympics, North London has the clear potential to benefit from GLA's strategy of diversifying hotel and tourism development outside Central London. The draft SRDF identifies Brent Cross / Cricklewood. Haringey Heartlands and the ULV as primary locations for potential hotel development, with Walthamstow Town Centre and Colindale as secondary locations.

A strategic North London approach to the visitor economy therefore has particular potential – building on existing and potential strengths. A North London Tourism Strategy and Action Plan has been developed jointly by the LDA and North London Ltd. covering the period 2005-2007 and is the first attempt to draw together all elements of the North London visitor economy within a strategic framework. The Tourism Strategy recognises that increasing the number of bed spaces in North London is integral to increasing investment in the local economy and providing a sound infrastructure to support the needs of visitors.
In addition, the North London Tourism Steering Group has been established to begin to develop a collaborative approach that will enable the North London tourism industry to have a strong, independent and unified voice.

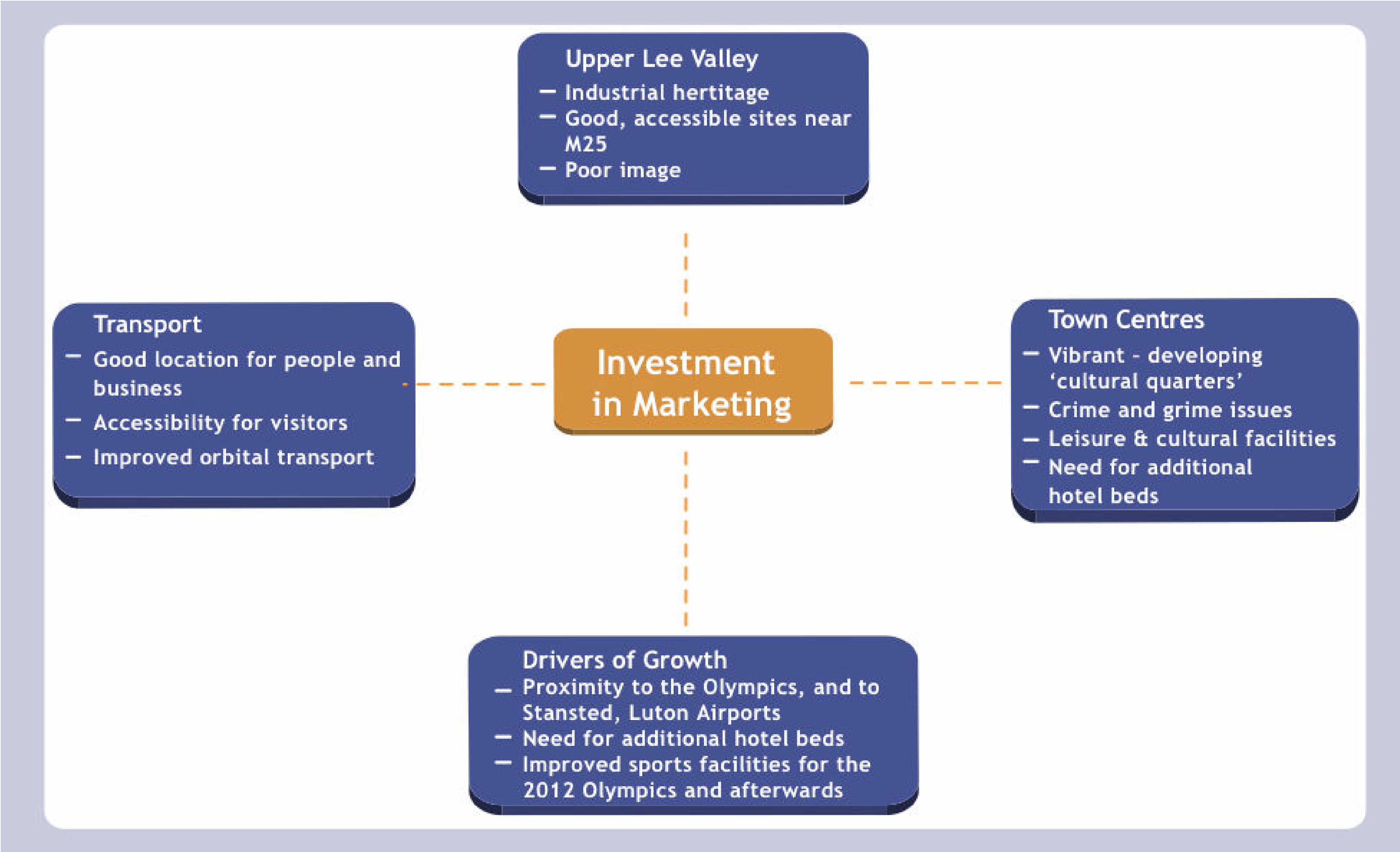
SUMMARY OF KEY ISSUES / PRIORITIES

Partners in North London are committed to creating a clear sense of identity for the sub-region. A key strength is its 'quality of life' and good transport links to Central London and surrounding areas into the sub-region. On the other hand, it has not yet developed a reputation as a business destination within London and its visitor economy requires promotion and development.

North London needs to:

- further use the marketing experience / expertise of existing large corporates to promote North London's advantages as a business location.
- use improvements in infrastructure to counter the perceived 'crime and grime' image of parts of the sub-region, fo example in the ULV.
- lobby for improvements in orbital transport connections to ensure tourism benefits spread further across North London and visitors can reach multiple destinations in the sub-region.

- encourage investment in better sports facilities to help deliver the Olympics and provide a long-term legacy for local people.
- promote the sub-region as a destination for tourists and encourage development of more visitor accommodation stock (hotels) in appropriate locations throughout the sub-region.


Upper Lee Valley
– Industrial heritage
– Good, accessible sites near M25
– Poor image
Transport
– Good location for people and business
– Accessibility for visitors
– Improved orbital transport
Investment in Marketing
Town Centres
– Vibrant - developing 'cultural quarters'
– Crime and grime issues
– Leisure & cultural facilities
– Need for additional hotel beds
Drivers of Growth
– Proximity to the Olympics, and to Stansted, Luton Airports
– Need for additional hotel beds
– Improved sports facilities for the 2012 Olympics and afterwards

Investment in marketing and promotion – to make sure what London has to offer is understood, supported and valued.					
NORTH LONDON PRIORITY AREAS: UPPER LEE VALLEY					
North London Implementation Plan Priorities for Action	**Fit with LDA EDS Objectives**	**Fit with GLA SRDF Actions**	**Milestones / Outcomes**	**Possible partners**	**Possible resources**
Promote the new vision for the ULV, stressing its proximity to the Lower Lee Valley.	Maintain and develop London as a top international destination and principal UK gateway for visitors, tourism and investment.	Proposed Actions:	At least three joint meetings with Lower Lee Valley boroughs at member-level by March 2007 Produce a branded vision for the sub-region by March 2008	NLL* NLSA ULV Group LB Enfield LB Haringey LB Waltham Forest NLCC Major employers in the ULV GoL	LDA ERDF Major employers
NORTH LONDON PRIORITY AREAS: TOWN CENTRES					
Increase the number and quality of hotel rooms in North London – particularly within the main town centres and around transport hubs.	Maintain and develop London as a top international destination and principal UK gateway for visitors, tourism and investment.	Proposed Actions: 1D	Review the LDA-funded PWC report on hotel availability in North London by 2007 In conjunction with Council planners, identify one strategic site per borough for hotel development by December 2007	NLSA - Sub-regional Town Centres Development Forum* NLL	LDA

Investment in marketing and promotion – to make sure what London has to offer is understood, supported and valued.

NORTH LONDON PRIORITY AREAS: GROWTH DRIVERS

North London Implementation Plan Priorities for Action	Fit with LDA EDS Objectives	Fit with GLA SRDF Actions	Milestones / Outcomes	Possible partners	Possible resources
Promote and market North London on the basis of its proximity to the sub-regional growth drivers (eg. Central London, Stratford, Stansted and the M1 Corridor), the availability of land and a positive, business-friendly approach on the part of local Council by. • developing a business charter for the promotion of the North London sub-region as a business-friendly location. • identifying 6 North London Ambassadors (from local businesses) willing to speak on behalf of the region.	Ensure a coherent approach to marketing and promotion in London. Maintain and develop London as a top international destination and principal UK gateway for visitors, tourism and investment.	Proposed Actions: ?	Business charter developed and agreed by the 4 NL boroughs – by June 2006 6 NL Ambassadors identified and undertaking speaking engagements on behalf of the region – by September 2006	NLL* Major employers NLSA	LDA

Monitoring the plan

The actions contained within this plan will be monitored through reports to the sub regional strategy group which meets on a bi-monthly basis and comprises planning and regeneration officers from each of the four local authorities plus partners from the Learning and Skills Council, North London Ltd, Urban Futures, voluntary sector, health sector and regional government.

In addition the following table shows the suite of indicators which will be monitored to show the state of the economy across North London. These data sets will be reported at six monthly intervals although, as the right hand column shows, only some of the data will change in each reporting period. This is not intended to be a definitive list – further data sets will be added through the development and implementation of this plan.

Measure	*Area*	*Frequency*
1. School enrolments (by country of origin)	By borough	6 monthly
2. Employment rates (by age, sex, ethnic group, disability)	By borough	6 monthly
3. Workless rates (by age, sex, ethnic group, disability)	By ward	6 monthly
4. Benefit claimants (by age, sex, ethnic group)	By SOA	6 monthly
5. GVA per head of population	By borough	Annual
6. Net Business start-up rate	By borough	Annual
7. Employment numbers by sector	By borough	Annual
8. Businesses by sector	By borough	Annual
9. Skills levels	By borough	Annual
10. GCSE A-C pass rates	By ward	Annual

11. Rental value of retail property:	Wood Green Walthamstow Enfield Cricklewood/Brent Cross	Annual
12. % retail voids:	Wood Green Walthamstow Enfield Cricklewood/Brent Cross	Annual
13. Public perception of major town centres	Wood Green Walthamstow Enfield Cricklewood/Brent Cross	Every three years
14. % people who work outside the sub-region	By borough	Every three years
15. Average journey times to work	By borough	Every three years
16. % journeys to place of work made by public transport	By borough	Every three years

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