

Written Statement

On behalf of Brentside Developments Ltd
(Representation ID REP079)

December 2025

Turley

1. Introduction

- 1.1 Our Client, Brentside Developments Ltd, owns the site known as 980 Great West Road, London (draft Site Allocation ref. 118 Former GSK Site) (the 'site'), as fully set out in our Regulation. 19 written representations (hereafter: "R19WR") (ref. REP079).
- 1.2 Prior to our Client's acquisition, GSK occupied the site from 2001 – 2024. Prior to 2020, the Site was fully occupied however, due to and following the COVID-19 pandemic the business experienced a significant culture change with large numbers of employees working remotely. Consequently, the number of employees using the Site decreased rapidly resulting in large parts of the office campus being unused. As a result, GSK sought to progress a site disposal strategy with the aim of rationalising their overall workspace requirements which has included relocating parts of the business to other locations across the United Kingdom as well as moving the majority of its operations to a new, bespoke central London office with a smaller footprint.
- 1.3 In this context, our Client, has collaborated with the London Borough of Hounslow ('LBH') and the Greater London Authority (GLA) and other key stakeholders, over the last 18 months bring forward a comprehensive mixed-use masterplan for the site's redevelopment. This has been subject to a robust pre-application process following which a hybrid planning application was submitted in August 2025 (ref. P/2025/2394) seeking consent for the following development:

"Hybrid planning application for the partial demolition of existing buildings excluding the basement and phased mixed use redevelopment comprising: in full, residential, Class C3, Purpose Built Student Accommodation and Purpose Built Shared Living, in full flexible employment, commercial and community floorspace, use Class E, F, B2, B8, Bar and Drinking establishment, Car/bike showroom, theatre launderette, dance hall, cinema, hot food takeaway, virtual reality/immersive experience venue and escape room, Sui Generis, in full, Energy Centre, Sui Generis, in outline, all matters reserved except access, for residential, Class C3, flexible employment, commercial, education/research and community floorspace, use Class E, F, B2, B8, bar and drinking establishment, car/bike showroom, theatre, laundrette, dance hall, cinema, hot food takeaway, virtual reality/immersive experience, experience venue, and escape room, Sui Generis, associated basement works and ancillary service yard areas; and, including for both full and outline parts all other ancillary car/cycle parking, amenity, plant, public and private realm, landscaping, infrastructure, access and highway works. Further explanation, not forming part of the formal description of development set out above. The height of the proposed development is up to 118m and up to 26 storeys."
- 1.4 The proposals proposed to deliver 761 new homes, 21,135sqm of Purpose-Built Student Accommodation (PBSA) (comprising 506 bedspaces), 14,205sqm Purpose-Built Shared Living (PBSL) accommodation comprising 296 PBSL ('Co-living') homes, 3,277sqm of flexible commercial and community floorspace, circa 2,600sqm of flexible employment floorspace and a 1,439sqm energy centre across nine separate development blocks within the detailed part of the planning application. The outline part of the planning application seeks approval for up to a further 127,886sqm of residential floorspace (Class

C3), up to 2,000sqm of flexible Class E(g) floorspace and up to 30,611sqm of flexible class E(g), B2, B8 or F1(a) floorspace across seven development plots.

- 1.5 The application is expected to be heard at LBH's Planning Committee in early 2026 following conclusion of the statutory consultation process on the application to which the Applicant is currently working with LBH (and wider stakeholders) to respond to and address matters that have been raised. Due to the strategic nature of the Development the application has been referred to the Mayor of London who has now published the GLA Stage 1 Report on the proposals (within which the significant public benefits of the scheme are recognised).
- 1.6 The Site is designated as a Key Existing Office Location ('KEOL') within LB Hounslow's adopted and emerging Local Plan, which provides planning policy protection against a loss of the existing office use. As these instructions and the accompanying documents outline, this policy protection reflects the Council's position that the site had historically been considered to provide important and prime office accommodation within the Borough. It should be noted that the site is also allocated for mixed use redevelopment under the emerging Local Plan (draft Site Allocation ref. 118 Former GSK Site).
- 1.7 On 28th October 2024, we, on behalf of Brentside Developments Ltd, submitted REP079 on the Proposed Submission Version Draft Local Plan, which was published in July 2024 underwent public consultation between 6th September 2024 and 28th October 2024
- 1.8 Despite the prime quality of the Site's existing office accommodation and its adopted and emerging KEOL designation, the Site has a prolonged high level of vacancy. Following our Client's ongoing marketing of vacant floorspace for office use, and various attempts to modernise and upgrade facilities to attract occupiers, our Client is exploring the potential for (re)developing the Site to provide a flexible employment scheme (i.e. flexible industrial and logistics) and is engaged with pre-application discussions with both LB Hounslow and the Greater London Authority.

- 1.1 On 28th October 2024, we, on behalf of Project Bloom BL Ltd, submitted R19WR on the Proposed Submission Version Draft Local Plan, which was published in July 2024 underwent public consultation between 6th September 2024 and 28th October 2024.
- 1.2 The representations sought policy changes to the following policies:
 - Draft Site Allocation ref. 118 Former GSK Site
 - Draft Policy P1 – Great West Corridor Vision
 - Draft Policy P1(a) – Great West Corridor West
 - Draft Policy ED1 - Promoting Employment Growth and Development
 - Draft Policy ED2 – Maintain the Borough's Employment Land Supply
 - Draft Policy ED3 – Hotels and Visitor Accommodation
 - Draft Policy SC2 – Maximising The Provision Of Affordable Housing

- Draft Policy SC3 – Meeting The Need For A Mix Of Housing Size And Type
- Draft Policy SC11 - Other Forms Of Housing
- Draft Policy CC3 Tall Buildings

1.9 The written representations were supported by initial economic analysis prepared by the Client's economic advisor Volterra Partners and a separate Office Market Assessment prepared by Commercial Agents JLL. Together these questioned the validity of our client's site to remain designated as part of the Great West Road KEOL under the new Local Plan.

1.10 This Written Statement seeks reinforce the comments previously made on the matter by providing additional economic analysis which has been prepared in support of our Client's final proposals for the site.

1.11 This Written Statement is supported by a 'Employment Needs Assessment' Report, prepared by Volterra Partners in June 2025, which is found at **Appendix 1** of this statement.

1.12 This report considers the macroeconomic conditions which justify the need to transform the Client's site, and in doing so questions the validity of its status as KEOL. In light of this, the report considers the potential sectors and commercial floorspace uses that would be more appropriate at the site providing recommendations on the quantum of commercial floorspace that would be suitable for this mixed-use regeneration, with the analysis carefully informing the final content of the proposed mix of uses included within the live planning application for the site.

2. Matter 4: Employment, Retail and Other Main Town Centre Uses (including proposed releases of Green Belt and Metropolitan Open Land)

Issue 1: Whether the Plan has been positively prepared and whether it is justified, effective, consistent with national policy and in general conformity with the London Plan in relation to the Borough's economy and employment (including proposed releases of Green Belt)?

Question 10) Is the identification and boundaries of the Strategic Industrial Sites (SIL), Locally Significant Industrial Sites (LSIS), other existing industrial sites, Key Existing Office Locations (KEOL), Great West Corridor Creative Enterprise Zone and Strategic Outer London Development Centre - justified, consistent with national policy and in general conformity with the London Plan 2021?

Response

2.1 As set out previously in representations ref. REP079, it is not clear how the retention of those sites which form the Great West Road KEOL (and includes our Client's site at 980 Great West Road) is justified in the new Local Plan, nor whether LBH has provided appropriate evidence that demonstrates this remains a prime location for substantial office uses. The Employment Needs Assessment (ENA), prepared by Volterra Partners on behalf of the Client and submitted in support of this Hearing Statement provides a detailed analysis of our Client's site, the extent to which it is contributing to the Great West Road KEOL and indeed the overall performance of the KEOL.

2.2 Volterra's latest analysis (paragraph 5.2 and figure 5.2) demonstrates that when considering all of the KEOLs in the borough only around half of the floorspace contained within respective boundaries is in office use and this is particular evident in the town centre focused KEOLs. With the space requirements associated with large-headquarters scale premises meaning such uses are often located in peripheral business parks and strategic business locations (Great West Road, Chiswick Business Park, and Bedfont Lakes Business Park). As is the case for our client's site, multiple premises within KEOLs that were former headquarters are now vacant notably these include, in the case of the Great West Road both GSK and Dell/EMC who have elected to relocate.

2.3 In the case of the Great West Road KEOL specifically, Volterra's latest evidence the KEOL is becoming significantly less homogenous in land use terms number of residential developments have come forward within the Great West Road KEOL in recent years, each of which removed or will remove a quantum of office floorspace from the total quantum contained in the KEOL:

- In June 2020, 166 apartments were delivered at Great West Plaza;

- In September 2021, 288 residential units were delivered at the Parkview residential redevelopment;
- Permitted development granted for the conversion of the Dell Tower into 206 residential units;
- Change of use of One Brentside Park to Use Class F1 (educational facility);
- Change of use of Three Brentside Park to a private hospital;
- The conversion of Vantage London to 178 residential units was granted planning approval;
- Permitted development granted for Great West House to provide 110 residential units at Gw2, and 153 residential units at Gw1 (although it is unclear whether this has yet been implemented); and
- 995 Great West Road is currently vacant and is actively being marketed for a new tenant with redevelopment opportunities earmarked.

2.4 Indeed, as of June 2025 of the twelve sites which form the Great West Road KEOL only two were in operational use for office purposes (or didn't benefit from permission to be converted to alternative uses. Assuming all sites with extant permission are developed. A defining characteristic of KEOLs to justify their allocation, is that such uses in these locations were considered to make a significant contribution to the local and regional economy.

2.5 The Client's latest evidence has prepared by Volterra Partners, demonstrates that The diminishing popularity of the KEOL as an office location, high vacancy rates, and recent redevelopment to alternative uses means the contribution of the Great West Road KEOL to the local and regional economy is limited. Based on this analysis, the Great West Road KEOL is considered to support only 9% of its theoretical employment capacity, in terms of office jobs within office space on-site (refer to ENA Table 5.1).

2.6 At the current occupancy level of the remaining office floorspace, our Client's latest ENA suggests that the Great West Road KEOL will now support just 3% of all office-based employment in LBH, and only 1% of all employment in LBH.

2.7 It is our client's view that this provides clear evidence that the Great West Road KEOL is no longer fulfilling its policy objective and the designation should either be removed or reviewed to ensure the plan is both justified and effective.

Question 11) Are the approaches in Policies ED1 and ED2 in terms of development proposals in SIL, LSIS, KEOL and other industrial and office sites – justified, effective, consistent with national policy and in general conformity with the London Plan 2021?

2.8 As set out previously within our submitted representations ref. REP079 we have suggested several revisions to draft policies ED1 and ED2 these all remain pertinent in our Client's opinion.

Draft Policy ED1 Part J

2.9 Nonetheless we consider it important to re-iterate the following that in relation to Part J of draft Policy ED 1, it currently notes proposals should deliver no net loss of all employment floorspace. This does not conform with the policy approaches as set out in the London Plan for the management of both office floorspace (London Plan Policy E1) and industrial floorspace/land (London Plan Policies E4-E7).

2.10 For office space, within the London Plan, there is no provision for the principle of no net loss, indeed as noted above London Plan Policy E1 provides a clear sequential based approach to the management of existing office floorspace. Therefore, the current wording is not 'justified' or 'consistent' with the London Plan as defined in the NPPF, as it is not clear on what basis this blanket 'no net loss' principle to the management of all existing floorspace is 'justified' and it conflicts with the strategic approach taken by the London Plan.

2.11 Similarly, the London Plan industrial policies do not directly apply a principle of no let loss of existing industrial floorspace and/or capacity. Instead, where there is a loss of industrial floorspace capacity (as defined clearly in the London Plan) as part of a mixed-use scheme, proposals are required to provide 50% affordable housing¹ (Part A of Policy H4 of the London Plan). LBH's approach to industrial land and managing any loss of 'industrial capacity' should follow this same approach.

2.12 In the case of our Client's site the industrial land policies are not relevant as the site has not been used for industrial purposes, however it is our opinion that the Council should revise its employment land policies to clearly define and separate the policy approach and process for managing 'loss' of industrial land and loss of existing office floorspace in line with the strategic policies contained within the London Plan. We suggest Part J of Policy ED1 should also be amended to:

"J. When proposing co-location of industrial and residential development, demonstrate that the proposals are in compliance with key design principles as set out in Policy E7 of the 2021 London Plan, including the agent of change principle. Operation of businesses on the site or on neighbouring sites must not be compromised by the introduction of non-employment uses. ~~Proposals should deliver no net loss of employment floorspace~~ Proposals should provide adequate access, servicing and delivery space, with

¹ Subject to emerging changes as detailed in the Mayor's draft Support for Housebuilding London Planning Guidance (LPG) (November 2025)

consideration given to the need for appropriate yard space provision to allow for the viable function of businesses;”

2.13 Whilst not the referenced in this question Part AA i of draft Policy P1 should also be amended to the same effect on the basis it applies a blanket principle of no-net loss of employment across the Great West Corridor Opportunity Area.

Draft Policy ED2 Part C

2.14 Based on the submitted evidence our client questions the validity of the Great West Road KEOL and its ability to meet its prescribed policy objective. We would encourage the Council to review the sites included within this KEOL and reconsider its boundaries.

2.15 In the context of client's site and the live planning application, the proposals were supported by a suite of documents to ensure the proposals comply with adopted Local Plan Policy ED2 (i.e. two years of marketing material has been presented and agreed with the Council, alongside a detail assessment of existing / future employment need).

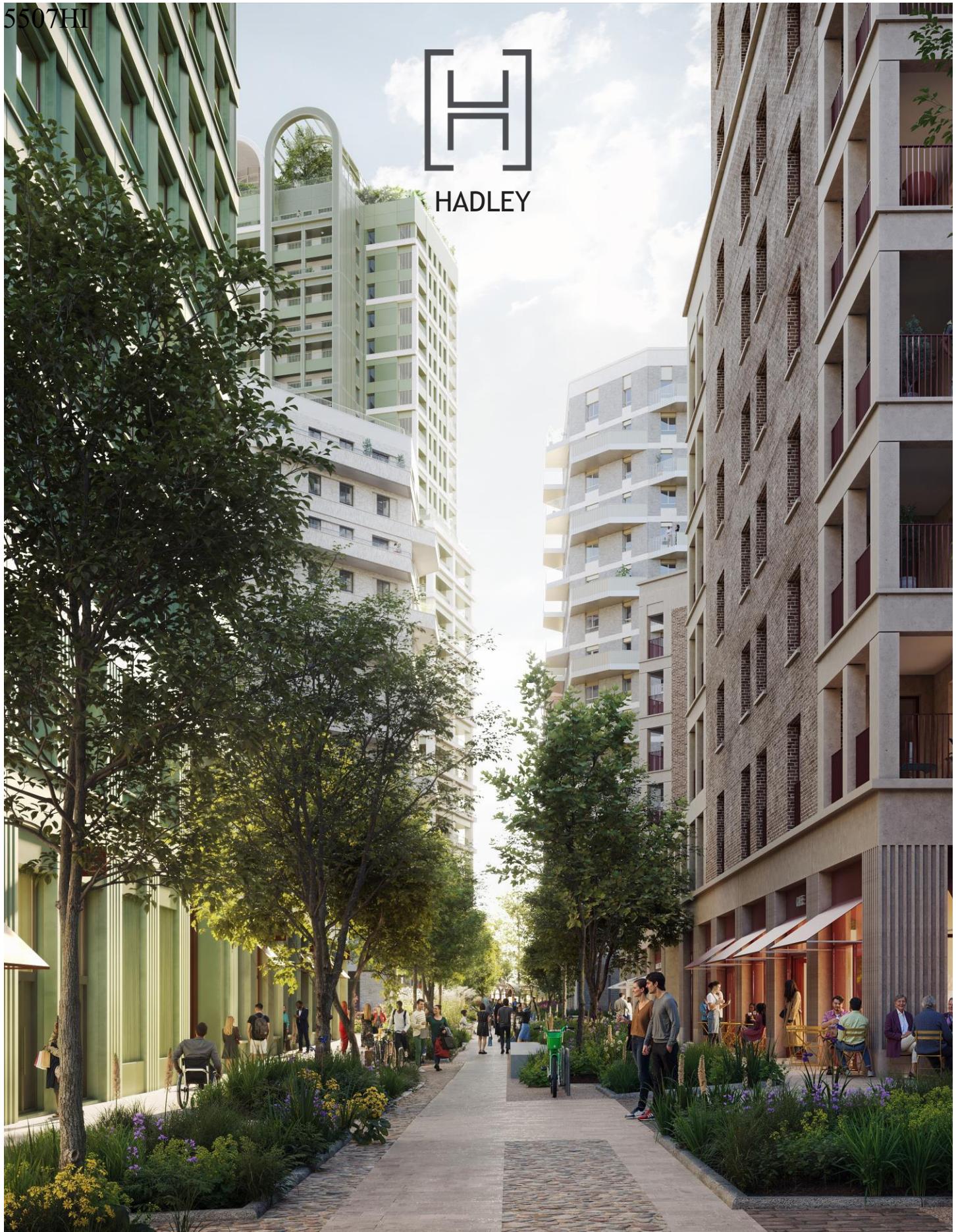
2.16 Indeed, our client's site is also subject to a separate draft site allocation for comprehensive, mixed-use redevelopment, all of which would suggest the site is no longer serving any meaningful employment function and so we would reiterate the need for removal of the KEOL designation in totality or at least those sites which are not making any meaningful contribution. Whilst our client is confident that a significant quantum of employment floorspace can come forward as envisaged by their proposed masterplan for the site, this in isolation does not justify continued KEOL status where other KEOLs (i.e. the town centre KEOLs) are continuing to perform strongly.

**Appendix 1: 980 Great West Road –
Employment Needs Assessment
(prepared by Volterra Partners)**

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980 Great West Road

Employment Needs Assessment – Volterra

June 2025

980 Great West Road

Employment Needs Assessment

June 2025

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1. Executive Summary

Introduction

1.1 Volterra Partners LLP ('Volterra') has been commissioned by Great Western Road Property Company Ltd ('the Applicant') to conduct an Employment Needs Assessment in support of the planning of the regeneration of 980 Great West Road in the London Borough of Hounslow (LBH). The report therefore sets out an appraisal of the appropriate type and quantum of employment space that could be accommodated and would suit the needs of the local and regional economy.

1.2 The existing 980 Great West Road site has a large headquarters office premises, formerly occupied by GlaxoSmithKline, who have now vacated as they sought new premises in Central London. The building comprises 56,862m² GIA of office floorspace.

1.3 The Proposed Development seeks to deliver a mixed-use neighbourhood with a mixture of residential, commercial, leisure and public realm uses, which will activate the site, at 980 Great West Road. Specifically, the development is described as:

1.4 *'Hybrid Planning Application for the partial demolition of and phased mixed-use redevelopment at 980 Great West Road comprising:*

DETAILED planning application for the partial demolition of the existing building and phased redevelopment of the existing basement and site comprising the erection of buildings for residential dwellinghouses (Use Class C3); Purpose Built Student Accommodation (PBSA) (Sui Generis); Purpose Built Shared Living (Co-Living) (Sui Generis); employment and commercial floorspace (Use Class E, B2, B8, Bar and Drinking establishment, Car/bike showroom, theatre launderette, dance hall, cinema, hot food takeaway, virtual reality/immersive experience venue and Escape Room (Sui Generis)); community floorspace (Use Class F, Sui Generis); and Energy Centre (Sui Generis), ancillary car/cycle parking, amenity, and plant, and other associated landscaping, public and private realm, highway works and infrastructure; and

OUTLINE planning application (with all matters reserved except access) for the partial demolition and phased redevelopment of the site to comprise development plots for residential (Use Class C3); flexible employment, commercial, education/research and community floorspace (Use Class E, F, B2, B8, bar and drinking establishment, car/bike showroom, theatre, laundrette, dance hall, cinema, hot food takeaway, virtual reality/immersive experience, experience venue, and escape room (Sui Generis)), associated basement works, and all other ancillary service yard areas, car/cycle parking, amenity, plant, public and private realm, soft/hard landscaping, infrastructure, access and highway works.'

1.5 Given the application is hybrid, there remains flexibility within the application around the exact uses to be accommodated. This provides flexibility for the commercial space to respond to occupier requirements in terms of its function and characteristics. The Applicant has completed a considerable amount of engagement with agents and prospective occupiers to understand how the commercial uses on site can best address economic growth aspirations for the Great West Corridor. The quantum of uses considered for the purposes of this report reflects the illustrative masterplan, comprising the following uses. It is recognised that within the parameters proposed a wider range of floorspace quantum could potentially come forward.

- Within the detailed component, 5,356m² GIA of commercial floorspace, including:
 - 2,564m² GIA of use class B2/B8/E(g)/F1; and
 - 2,791m² GIA of use class E/F/SG.
- Within the outline component, an additional 27,362m² of commercial floorspace, including:
 - 23,945m² GIA of use class B2/B8/E(g)/F1; and

- 3,418m² GIA of use class E/F/SG.

1.6 Within the commercial floorspace offer set out above, 26,509m² GIA of floorspace could come forward (primarily within Plot J) as use class B2/B8/E(g). These uses are considered to accommodate what are referred to as 'core employment uses'. These uses align with those that fall within the scope of the LBH Employment Land Review (2024).

1.7 This report considers the macroeconomic conditions which justify the need to transform the site, and in doing so questions the validity of its status as a Key Existing Office Location (KEOL). In light of this, the report considers the potential sectors and commercial floorspace uses that would be more appropriate at the site providing recommendations on the quantum of commercial floorspace that would be suitable for this mixed-use regeneration.

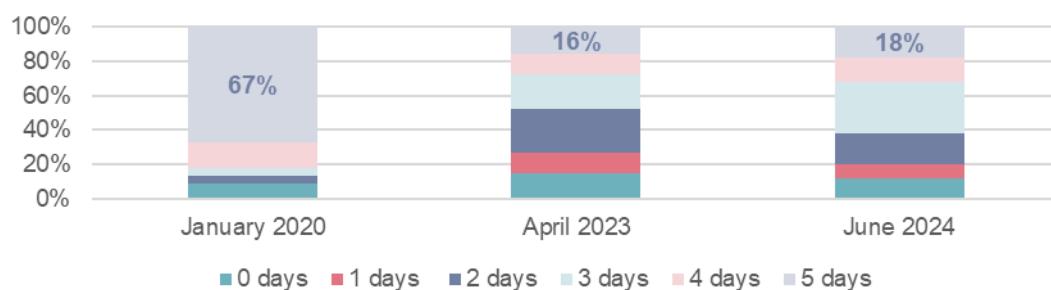
1.8 **This report was submitted to LBH for consideration in June 2025. The report is also being submitted as part of the planning submission. Figures and accompanying narrative in this report have been updated to reflect the finalised quantums of employment space and housing units at the proposed development. Other than this, the report remains unchanged in comparison to the June 2025 issue.**

Workplace trends affecting 980 Great West Road

1.9 Home and hybrid working trends were already increasing prior to 2020, however the imposed economic restrictions resulting from the coronavirus pandemic significantly accelerated this trend. These trends are particularly pronounced in the capital with 60% of Londoners reporting some degree of home or hybrid working on an average week in 2023 – significantly higher than the UK levels of 44%.

1.10 Return to the office mandates have been increasing in recent months; however, they are still a way off pre-pandemic expectations. Whilst there was a 2 percentage point increase between 2023 and 2024 in Londoners working five days in the office, the current levels of 18% remain significantly below the pre-pandemic levels of 67%. Whilst forecasting future trends is an inevitably uncertain exercise, the rather marginal increase in five-day office working between 2023 (16%) and 2024 (18%), compared to the significant reduction in comparison to the pre-pandemic levels (67%) suggests that **some level of home and hybrid working is here to stay for most London companies in the medium term future.**

Most common number of days in the office in London



1.11 Indeed, a Chartered Institute of Personnel and Development (CIPD) survey of office businesses found that the majority of office-based employers are not seeking to increase the mandated number of office attendance days beyond two to three days.

1.12 Lower levels of office attendance are inevitably causing large companies to reconsider their estate portfolio – 'right-sizing' given a better understanding of expected occupancy and utilisation levels. In 2023, 50% of large companies were expecting to shrink their global workspace footprint, with reductions in the range of 10

- 20%. As part of this consolidation of stock, to incentivise workplace attendance, companies are prioritising higher quality office stock in more central and amenity-rich locations.
- 1.13 These factors played a major role in GSK's decision to vacate 980 Great West Road in favour of a more central HQ location.
- 1.14 **These challenges are not unique to LBH and have been occurring elsewhere in London**, most notably in HSBC's decision to relocate from the 93,000m² offices in Canary Wharf in favour of a 52,000m² space in the City.

The Great West Road KEOL

- 1.15 The LBH Local Plan was adopted in September 2015 and as part of Policy ED2 defined a KEOL as follows:

Key Existing Office Locations ‘serve a strategic role in providing office floorspace for businesses that demand large premises... Offices in these locations make a significant contribution to the local and regional economy.’¹

- 1.16 The LBH KEOLs comprise two strategic business parks (Chiswick Business Park and Bedfont Lakes Business Park), a strategic business location (Great West Road) and the town centres of Feltham, Hounslow, Brentford, and Chiswick.
- 1.17 The rationale for designating KEOLs is unclear within planning policy and supporting evidence. The designations have been in place since the Local Plan 2015-2030 which indicates that the rationale for their designation may no longer be based on the most recent evidence.
- 1.18 The Great West Road KEOL is experiencing the effects of low demand for office space, particularly larger office floorplates. In 2020, assuming all of the Great West Road KEOL office space was operating at full capacity, the KEOL had capacity for an estimated 13,200 jobs. Over the past five years, five office buildings have been (or are soon to be) converted to residential, 980 Great West Road is vacant, and many of the other office spaces operate at around 20% vacancy rate. Present day, the estimated employment of the Great West Road KEOL is 1,150, representing an estimated **12,000 decrease in jobs from its full potential five years ago**.
- 1.19 This demonstrates the extent to which the Great West Road KEOL is no longer fulfilling its original policy objective of making “a significant contribution to the local and regional economy”. This is due to the multitude of macroeconomic factors presented in this report for which local government policy is very unlikely to be able to affect. In this sense, the Great West Road KEOL designation is no longer appropriate for the current makeup of the area.
- 1.20 Multiple challenges threaten the out-of-town centre KEOL locations on a number of fronts. Firstly, occupiers are rationalising their estate portfolio to respond to reduced floorspace requirements due to lower (hybrid) worker attendance, yet these KEOLs are characterised by large floorplates. Uncertainty around space utilisation and occupancy means occupiers require adaptable space that facilitates scaling, yet many of the offices in KEOLs are designed with large floorplates and specific headquarters occupiers in mind. To attract

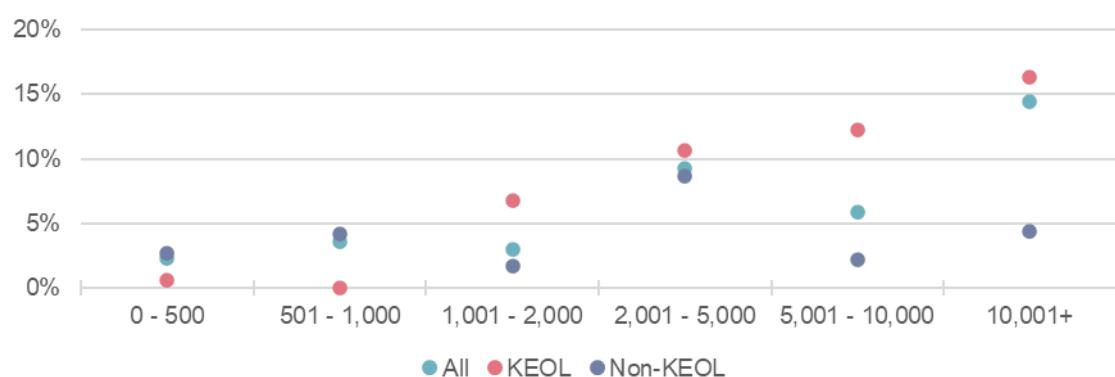
¹ LB Hounslow, 2015. Local Plan.

and retain talent, occupiers want to provide their workforce with amenity-rich environments, yet these KEOLs lack on-site or nearby accessible amenities, and often have poorer public transport accessibility.

1.21

Large office premises in KEOLs have higher vacancy rates compared to non-KEOL large offices, suggesting that **the KEOL designation that aims to protect certain properties in LBH may be doing so in contradiction to market signals about demand**. In potentially undermining the adaptability of the site, there could be an opportunity cost if alternative uses which could generate greater economic and social value are not pursued.

Vacancy rate of LBH offices by size band (m²)



Future employment opportunities at 980 Great West Road

1.22

Great West Corridor Past, Present, Future Report identified a number of sectors that were showing persistent growth in LBH, or presented future opportunities, and would be locationally suitable in the Great West Corridor. These industries are presented below, with life sciences being added as a possibility due to the national focus on this sector and the adjacency of 980 Great West Road to the University of West London:

- Creative, cultural and digital;
- Media production;
- Creative manufacturing;
- Immersive entertainment and experiences;
- High-tech or advanced manufacturing;
- Low carbon and green energy;
- Business and professional services;
- Automotive sector; and
- Life sciences and knowledge economy.

The appropriate types and quantum of employment space at 980 Great West Road

1.23

An appropriate total numbers of jobs² supported at a regenerated mixed-use 980 Great West Road has been estimated using three methodologies:

- **More residents, more jobs:** utilises evidence from the GLA regarding the statistical relationship between population growth and employment growth. This implies **331 jobs** in core employment types (office, workshop, industrial, warehousing) should be supported.
- **Existing jobs:residents ratio:** utilises the existing ratio of jobs to residents in LBH, with other considerations around levels of out-commuting and numbers of working age residents, to identify the labour supply. This implies **906 jobs** in core employment types should be supported.
- **Future homes:jobs ratio:** utilises the ratio of future housing need and employment growth in LBH, as set out in relevant LBH policy documentation. This implies **1,148 jobs** in core employment types should be supported.

1.24

How these jobs would then translate to different floorspace requirements is calculated using a number of scenarios. These scenarios are:

- **ELR implied split:** assume the commercial floorspace use split of 980 Great West Road is in line with the forecast need established in LBH's Employment Land Review (ELR) 2024.
- **Local specialisms:** assume the commercial floorspace split aligns with the space requirements of local specialism such as creative industries, high-tech/advanced manufacturing, low carbon, and business services firms.
- **Life sciences cluster:** due to presence of the WestTech corridor, and the proximity of UWL, a scenario has been devised reflecting the space requirements of a life sciences cluster.

1.25

The final range of possible suitable floorspace quantums supported at the redeveloped 980 Great West Road is set out below.

Quantum of employment floorspace need arising from the new population, by development typology and approach to jobs³ target (sqm)

	More residents, more jobs (331 jobs)	Existing jobs:residents ratio (906 jobs)	Future homes:jobs ratio (1,148 jobs)
ELR implied split			
High density	7,000	19,200	24,300
Moderate density	8,500	23,200	29,400
Low density	10,700	29,400	37,200
High hybrid working efficiency	6,300 – 9,600	17,300 – 26,300	21,700 – 33,000
Local specialisms			
High density	5,000	13,700	17,400

² The number of jobs presented reflects total employment rather than full time equivalent jobs (FTEs).

³ The number of jobs presented reflects total employment rather than full time equivalent jobs (FTEs).

	More residents, more jobs (331 jobs)	Existing jobs:residents ratio (906 jobs)	Future homes:jobs ratio (1,148 jobs)
<i>Moderate density</i>	6,000	16,500	20,900
<i>Low density</i>	7,300	20,100	25,400
<i>High hybrid working efficiency</i>	4,100 – 5,900	11,300 – 16,100	14,000 – 19,900
Creative cluster			
<i>High density</i>	8,400	23,000	29,200
<i>Moderate density</i>	9,900	27,100	34,300
<i>Low density</i>	11,500	31,500	39,900
<i>High hybrid working efficiency</i>	8,000 – 10,900	22,000 – 29,800	27,700 – 37,500
Life sciences cluster			
<i>High density</i>	6,500	17,800	22,500
<i>Moderate density</i>	7,200	19,800	25,100
<i>Low density</i>	8,000	21,900	27,700
<i>High hybrid working efficiency</i>	3,900 – 4,800	10,700 – 13,100	12,600 – 15,500

1.26 In the majority of scenarios presented above, the implied core employment floorspace need for 980 Great West Road is below 26,509m² (the proposed 980 Great West Road provision).

1.27 In 83% of scenarios within the “Existing jobs:residents ratio” scenario, the implied employment floorspace need is below 26,509m². This shows that it is more likely than not that the proposed development at 980 Great West Road would be effective in “washing its own face” in the sense that it would provide the appropriate quantum of employment floorspace to resolve the impact of the increased demand for jobs driven by the increase in population. If the core employment offer focused on uses aligned with ‘Local specialisms’, then the proposed development would fully mitigate the impact of increasing demand for jobs in all scenarios.

1.28 In the “Future homes:jobs ratio” – “Local specialisms” – scenario, the implied employment floorspace need is below 26,509m² in all scenarios. This demonstrates that the current masterplan for 980 Great West Road is well placed to deliver employment space to suit local economic need, in a manner which contributes to LBH’s wider long-term forecast requirements around housing need and employment growth.

1.29 This demonstrates that the proposed **26,509m² of core employment floorspace is an appropriate quantum of provision**.

1.30 Assuming that the 26,509m² of employment floorspace uses are delivered in line with the “Local specialisms” scenario results in 980 Great West Road’s provision of office space being 16% of the LBH ELR target between 2020 and 2041, or 340% of the annual target.

1.31 This is considered a significant contribution for a site whose current employment floorspace is not viable and is not assigned any minimum commercial development quantum in its draft site allocation presented in the LBH’s Local Plan review.

2. Introduction

Purpose of this report

2.1 Volterra Partners LLP ('Volterra') has been commissioned by Great Western Road Property Company Ltd ('the Applicant') to conduct an Employment Needs Assessment in support of the planning of the regeneration of 980 Great West Road. The regeneration of the site would deliver a mixed-use masterplan, including the (re-)provision of employment space. This report therefore sets out an appraisal of the appropriate type and quantum of employment space that could be accommodated and would suit the needs of the local and regional economy.

2.2 The content of this report expands on previous work conducted during RIBA Stage 0 and Stage 1 which considered employment space needs. This report extends the existing analysis by providing an update to the previously reported data analysis on working patterns and local key sector growth using up-to-date sources.

2.3 Furthermore, emerging policy (which has been newly published since the Stage 0 and Stage 1 work) as it is now understood is reflected on. The report considers in greater detail how the proposals relate to the existing policy designations, and highlights how the proposals align with economic growth aspirations for the immediate area, the Great West Corridor, the London Borough of Hounslow (LBH) and the West London sub-economy more widely. Taking this into account, the proposed uses are investigated in further detail with closing recommendations on the types and quantum of employment-generating floorspace that would be appropriate on site.

2.4 **This report was submitted to LBH for consideration in June 2025. The report is also being submitted as part of the planning submission. Figures in this report have been updated to reflect the finalised quantums of employment space and housing units at the proposed development. Other than this, the report remains unchanged in comparison to the June 2025 issue.**

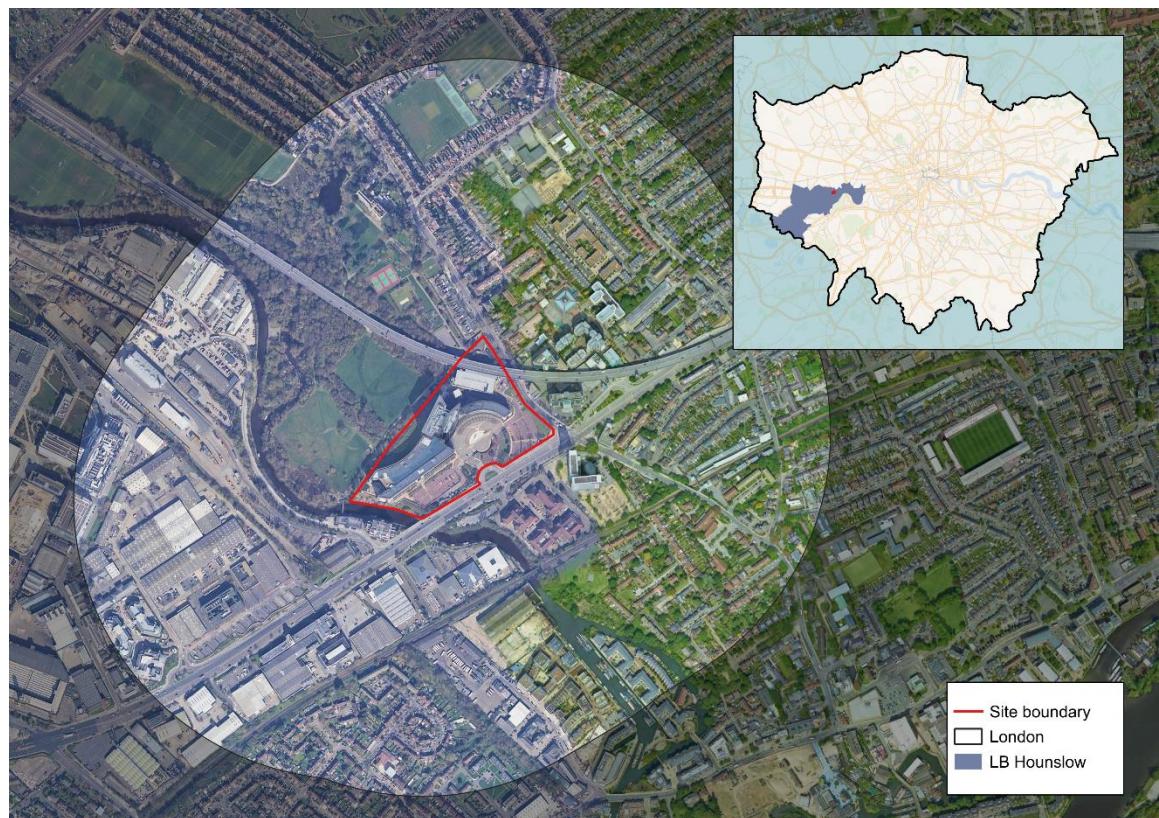
The opportunity

2.5 The existing site has a large headquarters office premises, formerly occupied by GlaxoSmithKline, but now vacated as the occupiers sought new premises in Central London. The building, constructed in the early 2000s, comprises 56,862m² GIA of office floorspace. The site is bounded by the M4, Great West Road, River Brent and Boston Manor Park, as shown in **Figure 2.1**.

2.6 The regeneration of 980 Great West Road presents an opportunity to future-proof the employment space on site by aligning the provision with modern requirements and local sector needs. The site has the potential to contribute to economic growth aspirations by providing new high-quality space across a range of typologies that can accommodate businesses of different sizes and sectors. The employment uses which are being assessed as potentially suitable to be included as part of the proposals include, but are not limited to: light industrial (to include stacked logistics/workspace as well as studio and creative workshop spaces); data centre; educational/teaching facilities; self-storage; automotive industry; office; and leisure.⁴

⁴ Great Western Road Property Company Ltd, 2024. 980 Great West Road Commercial Brief

Figure 2.1 Location of 980 Great West Road



2.7 The Proposed Development seeks to deliver a mixed-use neighbourhood with a mixture of residential, commercial, leisure and public realm uses, which will activate the site, at 980 Great West Road. Specifically, the development is described as:

'Hybrid Planning Application for the partial demolition of and phased mixed-use redevelopment at 980 Great West Road comprising:

DETAILED planning application for the partial demolition of the existing building and phased redevelopment of the existing basement and site comprising the erection of buildings for residential dwellinghouses (Use Class C3); Purpose Built Student Accommodation (PBSA) (Sui Generis); Purpose Built Shared Living (Co-Living) (Sui Generis); employment and commercial floorspace (Use Class E, B2, B8, Bar and Drinking establishment, Car/bike showroom, theatre launderette, dance hall, cinema, hot food takeaway, virtual reality/immersive experience venue and Escape Room (Sui Generis)); community floorspace (Use Class F, Sui Generis); and Energy Centre (Sui Generis), ancillary car/cycle parking, amenity, and plant, and other associated landscaping, public and private realm, highway works and infrastructure; and

OUTLINE planning application (with all matters reserved except access) for the partial demolition and phased redevelopment of the site to comprise development plots for residential (Use Class C3); flexible employment, commercial, education/research and community floorspace (Use Class E, F, B2, B8, bar and drinking establishment, car/bike showroom, theatre, laundrette, dance hall, cinema, hot food takeaway, virtual reality/immersive experience, experience venue, and escape room (Sui Generis)), associated basement works, and all other ancillary service yard areas, car/cycle parking, amenity, plant, public and private realm, soft/hard landscaping, infrastructure, access and highway works.'

2.8 Given the application is hybrid, there remains flexibility within the application around the exact uses to be accommodated. This provides flexibility for the commercial space to respond to occupier requirements in terms of its function and characteristics. The Applicant has completed a considerable amount of engagement with agents and prospective occupiers to understand how the commercial uses on site can best address economic growth aspirations for the Great West Corridor. The quantum of uses considered for the purposes of this report reflects the illustrative masterplan, comprising the following uses. It is recognised that within the parameters proposed a wider range of floorspace quantum could potentially come forward.

2.9 Within the detailed component, 5,356m² GIA of commercial floorspace, including:

- 2,564m² GIA of use class B2/B8/E(g)/F1; and
- 2,791m² GIA of use class E/F/SG.

2.10 Within the outline component, an additional 27,362m² GIA of commercial floorspace, including:

- 23,945m² GIA of use class B2/B8/E(g)/F1; and
- 3,418m² GIA of use class E/F/SG.

2.11 Within the commercial floorspace offer set out above, 26,509m² GIA of floorspace could come forward (primarily within Plot J) as use class B2/B8/E(g). These uses are considered to accommodate what are referred to as 'core employment uses'. These uses align with those that fall within the scope of the LBH Employment Land Review (2024).

2.12 Many of the themes underpinning the approach to development of the design and planning of the scheme are relevant to assessing employment needs:⁵

- **Agent of change:** the scheme has the potential to catalyse wider regeneration in the area and help define/respond to local employment needs in terms of the types of sectors and jobs which can support employment opportunities in future;
- **A place to live, work and play:** sustainable modes of development recognise the need to have job opportunities in appropriate locations in relation to housing growth; and
- **Resilient:** flexibility for employment space to evolve and adapt its use will make it resilient to economic uncertainty.

Structure of the report

2.13 The remainder of the report is structured:

- **Section 3:** provides a policy and literature review to contextualise the assessment.
- **Section 4:** considers how wider trends within the office market mean the site in its current form is likely to be inappropriate to support future employment needs.
- **Section 5:** considers the role of 980 Great West Road within its Key Existing Office Location and whether Great West Road is currently fulfilling its purpose as a Key Existing Office Location as set out in the relevant policy.
- **Section 6:** explores how the regeneration of the site presents an opportunity to support emerging employment needs in LBH including the types, scale and mix of uses that might be appropriate for key sectors.
- **Section 7:** assesses the appropriate quantum of employment spaces in light of the previous discussion on key sectors and their requirements.

⁵ Great Western Road Property Company Ltd, 2024. 980 Great West Road Commercial Brief

3. Policy and literature review

Introduction

3.1 The adopted Development Plan for the site comprises:

- The London Plan (2021);
- Hounslow Local Plan (2015) Volume 1;
- Hounslow Local Plan (2015) Volume 2; and
- Hounslow Local Plan Policies Map (2015)

3.2 The Government's national planning policies for England are set out in the National Planning Policy Framework ("NPPF") (2024). The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development, and that there are three dimensions to this – economic, social and environmental.

3.3 The NPPF is supported by the national Planning Practice Guidance ("PPG" or "NPPG"), and the recently published National Design Guide (2019), which provide supporting guidance covering a range of topics, including design and housing.

3.4 LBH is currently preparing their new Local Plan. LBH has previously produced Reg.19 Local Plans in four instalments during 2021:

- Volume 1 (Focussed Review);
- Volume 2 (Site Allocations DPD);
- Volume 3 (West of Borough DPD); and
- Volume 4 (Great West Corridor DPD).

3.5 However, following consultation with the Planning Inspectorate and the Monitoring Officer during the examination, concern was raised regarding the procedural and soundness issues of the plan in this form. As a result, the decision was made to formally withdraw from the process in July 2023.

3.6 Following discussions within the Council, an approach was agreed that allowed for the above documents to be amalgamated into a single Local Plan document that could be issued for review pending amendments to reflect proposed pre-submission changes; comments from the Inspectors during the examination process thus far; and other changes considered appropriate and necessary.

3.7 The Regulation 18 consultation took place in Winter 2023. The Regulation 19 consultation took place in Autumn 2024 and comprised the following documents:

- Hounslow Local Plan 2020 – 2041 Proposed Submission Document
- Hounslow Local Plan 2020 – 2041 Proposed Submission Version Chapter 12 – Site Allocations
- Hounslow Local Plan 2020 - 2041 Proposed Submission Version – Policies Map

3.8 On the basis of the above, (i.e. the plan remains at pre-submission stage) limited weight should be afforded to the policies at this time.

3.9 A summary of relevant policies regarding employment floorspace is provided below.

London Plan (2021)

3.10

The London Plan (2021) provides the overarching framework for planning and development in the capital.⁶ The Plan sets out a number of objectives relating to the promotion of economic growth through the effective use of land, echoing the thrust of the National Planning Policy Framework.⁷ Specific policies which aim to achieve this include:

- **Policy GG1 Building strong and inclusive communities** which 'seeks to ensure changes to the physical environment to achieve an overall positive contribution to London' and that a broader range of opportunities mean that growth is inclusive.
- **Policy GG2 Making the best use of land** prioritises creating successful sustainable mixed-use places.
- **Policy GG5 Growing a good economy** focusses on finding the appropriate locations for employment and industrial space.
- **Policy E1 Offices** specifically encourages '*improvements to the quality, flexibility and adaptability of office space of different sizes (for micro, small, medium-sized and larger enterprises) should be supported by new office provision, refurbishment and mixed-use development*'. As part of this the '*scope for the re-use of otherwise surplus large office spaces for smaller office units should be explored*' and '*redevelopment, intensification and change of use of office space to other uses including housing is supported*'.

3.11

The site is also located within the Great West Corridor Opportunity Area, with a cited potential for 7,500 new homes and 14,000 new jobs by 2041.

LBH Local Plan (2015)

3.12

The LBH Local Plan was adopted in September 2015 and is the guiding document for planning and development matters in the borough.⁸ The Local Plan sets out a range of policies relevant to the redevelopment of 980 Great West Road:

- **Policy SV1 Great West Corridor Plan** confirms that the council will work to '*explore and identify the potential capacity for additional employment-led mixed use development along the Great West Corridor and co-ordinate its regeneration*'. As part of this, the policy focusses on achieving a sustainable quantum of employment and residential development.
- **Policy ED1 Promoting employment growth and development** focusses on the spatial approach to delivery of employment space whereby offices should be '*directed to the borough's four town centres*' and new employment uses will be proposed on Allocated Sites.
- **Policy ED2 Maintaining the borough's employment land supply** highlights that Key Existing Office Locations should be managed and protected.

3.13

As part of Policy ED2, Key Existing Office Locations (KEOLs) are identified according to the below definition:

Key Existing Office Locations 'serve a strategic role in providing office floorspace for businesses that demand large premises...'

⁶ Greater London Authority, 2021. London Plan 2021.

⁷ Ministry of Housing, Communities and Local Government, 2024. National Planning Policy Framework.

⁸ LB Hounslow, 2015. Local Plan.

Offices in these locations make a significant contribution to the local and regional economy.⁹

LBH Local Plan Review (Ongoing)

3.14 LBH conducted consultation on the Regulation 19 Local Plan in 2024 as part of the Local Plan review process, which is anticipated to be adopted in 2026.¹⁰ Although not yet adopted, the emerging spatial development strategy and policies indicate how the borough will be shaped over the 15 years following adoption of the Plan.

3.15 The Great West Corridor has recently been designated as a Creative Enterprise Zone (CEZ). Areas of focus within the CEZ include providing affordable workspace, additional employment opportunities through additional infrastructure, and wider business engagement exercises. Proposals within the CEZ are more likely to be supported if they concern broadcasting, production, digital media, or augmented/virtual reality. The designation is further supported through emerging Policy P1 (Great West Corridor). The draft policy notes that the CEZ can be supported through the provision of affordable, flexible, modern and adaptable employment floorspace for different types and sizes of businesses and temporary meanwhile use proposals for cultural and creative activities. Draft Policy ED2 requires an assessment demonstrating that development proposals do not compromise the objectives of the CEZ which are to foster an environment where existing, innovative, cultural and creative enterprises can prosper..

3.16 The site is located within the Great West Corridor Opportunity Area, Great West Corridor West Place Policy area, and Site Allocation 118. The enhancement of the Opportunity Area through new redevelopment opportunities will be supported by LBH through:

- *'promoting the Great West Corridor as a strategic employment area';*
- *'supporting the local economy and creative industry by delivering a range of high-quality workspaces';*
- *'the provision of affordable, flexible, modern and adaptable employment floorspace for different types and sizes of businesses with a focus on start-up, incubator and grow-on space for creative and digital industries that diversify and strengthen the sector; the provision of space that promotes networking and information sharing between businesses and sectors within the creative and digital industries';*
- *'opportunities to intensify and make more efficient use of existing employment land by co-locating employment with residential uses, with employment uses mainly fronting the corridor and residential uses behind'.*

3.17 The site is included in the emerging **Site Allocation 118: Former GSK Site** which identifies appropriate employment uses as E(g)(i), E(g)(ii), E(g)(iii), B2 and B8, particularly to support the Creative Enterprise Zone, as well as residential uses. Specifically, *'proposals will be expected to retain or deliver some employment floorspace'* which would ideally include offices. The allocation envisions comprehensive redevelopment of the site and recognises the opportunities for transformative regeneration.¹¹

3.18 The draft Local Plan retains the site's designation as a 'Key Existing Office Location' (KEOL). While the principles within employment policy remain aligned with the Adopted Local Plan, policy adds further emphasis on the importance of KEOLs. Draft Policy ED1 looks to direct new offices to sites within KEOLs. Draft Policy ED2 requires the same information as set out in adopted policy to be submitted where a loss of Class E(g)(i)(ii)(iii), B2 or B8 or similar employment uses is proposed outside of SILs and LSIS. Draft Policy

⁹ LB Hounslow, 2015. Local Plan.

¹⁰ LB Hounslow, 2024. Hounslow Local Plan 2020 – 2041. Proposed Submission Version (Regulation 19).

¹¹ LB Hounslow, 2024. Hounslow Local Plan 2020 – 2041. Proposed Submission Version (Regulation 19). Chapter 12: Site Allocations.

ED1 makes the provision of 61,200m² of net additional office and 86,300m² of net additional industrial floorspace to be delivered in the east of the borough. These targets underpin the Council's borough wide approach of supporting employment uses.

LBH Employment Land Review Update (2024)

3.19 The Employment Land Review (ELR) Update prepared on behalf of LB Hounslow Council in 2024 supports the Local Plan Review process and provides a repository of up-to-date information on the supply and future need for employment generating floorspace in the borough.¹² The ELR finds with regard to offices that there is demand over the period between 2019 to 2043 for 205,000m² of space, comprised of 123,000m² of office and 82,000m² of workshop space¹³. This equates to 9,800m² targeted per annum, which is a reduction in per annum need compared to the previous assessment in 2020. Conversely, with regard to industrial space, there is a requirement for 465,000m² of space or an annual provision of 22,000m², which is an increase versus the previously assessed need. The overall need figure is for the borough as a whole, and no localised demand/need is prescribed for office floorspace.

3.20 The ELR reports that the Great West Corridor, as an employment corridor, struggles to attract and retain tenants despite having some good quality office stock. A key cited reason for this is that amenities and environment are off-putting for occupants and occupiers. The ELR also reports that even if space is refurbished, it can still be unpopular for tenants, emphasising the role of location in driving occupier demand for offices. An enduring demand for space in the Corridor is from businesses in the media sector which '*generally look for hybrid space that can flex between studio, workshop, as well as office*'.

3.21 The ELR promotes a positive approach to industrial intensification that has the potential to be successful in the future, in bringing about additional spatial, economic and urban intensification.¹⁴

3.22 The methodology used by the authors of the ELR for establishing future need for office space makes two departures from the standard and previously adopted approach. Firstly, the need for office is typologically split between office and workshop space in recognition of the enduring demand from creative and digital industries. These industries are sometimes classified as office-based when in reality a variety of spaces suited to technical functions are required. The ELR therefore recommends that a portion of the office demand is delivered as workshop type spaces. Secondly, the forecast does not make an allowance for replacement of losses i.e. does not take into account that office space is being/will be lost to other uses or demolished, which would typically increase the net demand position.

3.23 This choice is considered justifiable by the authors of the ELR on the basis that it would not be a pragmatic target to account for replacement of the named GSK site in the context of rising vacancy rates, losses of offices and stagnating levels of new delivery. It is set out that this context has not caused economic harm because jobs have nonetheless grown. This is an important observation: the purpose of assessing employment need is to safeguard existing and future jobs, and ensure appropriate supporting workplaces are available to do this. The identified need for office space over the study period has, in effect, discounted the existing site, and any future delivery of employment space (especially office or workshop space) should be viewed as contributing in net terms to the achievement of this target.

'There is a clear rationale to change the method for assessing the need for office floorspace. It is no longer logical to

¹² LB Hounslow, 2024. Employment Land Review Update.

¹³ The ELR Update identifies workshop space as flexible hybrid workspace that can easily adapt between office, studio and very light industrial uses, which is particularly suited to supporting the creative industries.

¹⁴ Greater London Authority, 2021. Industrial Intensification and Co-location Study. Design and Delivery Testing.

compensate for office losses because of high office vacancy and a general weak market. In the past we would have looked to replace recent losses on the assumption they were generally occupied at the time they were lost.¹⁵

London Growth Plan (2025)

3.24

London is suffering a productivity growth problem.¹⁶ Between 2008 and 2021, London's productivity reportedly grew by 1.5% compared to 6.9% for the UK as a whole. In recognition of the threat this presents to growth ambitions and securing economic opportunities for all Londoners, the Mayor of London/London Councils published the London Growth Plan in 2025.¹⁷ Framed within a narrative of "reinvention", the Growth Plan established four key ambitions:

- **Productivity:** raise productivity growth rates to 2% average per year over 2025 to 2035.
- **Inclusion:** raise the real household weekly income (after housing costs) of the lowest earning 20% of Londoners by 20% by 2035.
- **Green growth:** accelerate progress towards achieving London's net zero target for 2030.
- **A global capital:** grow London's services exports by an average of 6% per year.

¹⁵ LB Hounslow, 2024. Employment Land Review Update.

¹⁶ GLA Economics, 2024. Wage and productivity growth in London since 2008.

¹⁷ Mayor of London/London Councils, 2025. London Growth Plan.

4. Workplace trends affecting 980 Great West Road

4.1

This section of the report considers the context which underpins the redevelopment of 980 Great West Road. Firstly, the trends and drivers in the office market are set out, before consideration is given to the designation of the site as part of a KEOL. The performance of the Great West Road KEOL, as well as LBH's KEOLs more generally, is considered against the policy aspiration originally assigned to them.

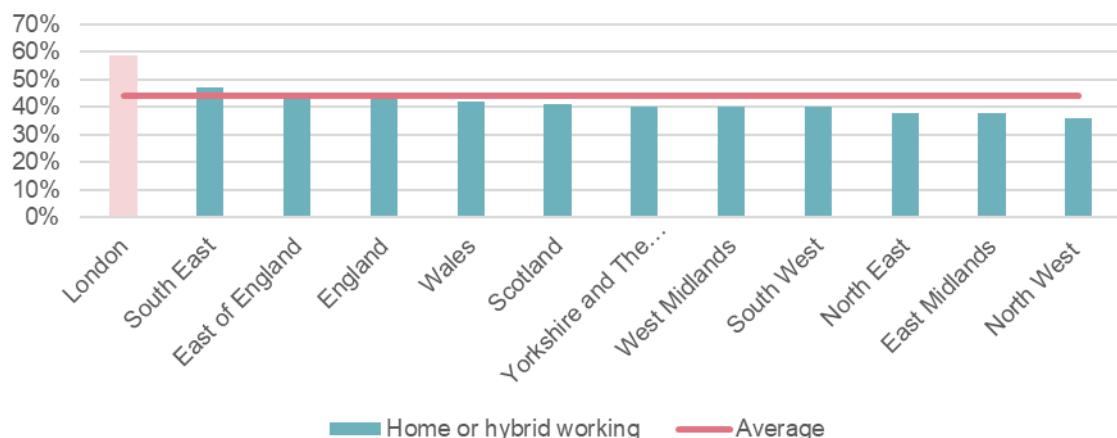
The changing nature of workplace attendance

4.2

The widespread adoption of virtual and digital technologies in the workplace, catalysed by restrictions on workplace attendance during the coronavirus pandemic, has facilitated alternative working practices that include remote and hybrid working. Prior to the pandemic, office workers would typically spend the majority of the working week attending the office. As employers and employees have become more familiar and embraced the use of virtual technologies for communication, time spent away from the office has become more commonplace. In January 2023, in London, nearly 60% of those who had worked in the previous seven days reported some degree of home or hybrid working.¹⁸ This is much higher than the average rate (44%) and higher than any other region in the UK.¹⁹ The degree to which jobs can be carried out from home depends on factors such as whether the job needs to occur in a specific location, the amount of face-to-face interaction, exposure to hazards, the requirement for physical activity, and use of tools or specialist/protective equipment.²⁰ The highest adoption rates of hybrid and homeworking is recorded for businesses in traditionally office-based sectors such as information and communication (76.9%), and professional, scientific and technical activities (60.4%).²¹

Figure 4.1 The degree of hybrid and homeworking in London outstrips the rest of the UK

Degree of hybrid and homeworking of those in work in the seven days preceding survey (2023)



¹⁸ Office for National Statistics, 2023. Characteristics of homeworkers, Great Britain. Worksheet 7: Location of work by country and English regions.

¹⁹ With the exception of Northern Ireland, for which data was not collected.

²⁰ Office for National Statistics, 2020. Which jobs can be done from home?

²¹ Office for National Statistics, 2024. Who are the hybrid workers?

Source: Office for National Statistics, 2023. *Characteristics of homeworkers, Great Britain. Worksheet 7: Location of work by country and English regions.*

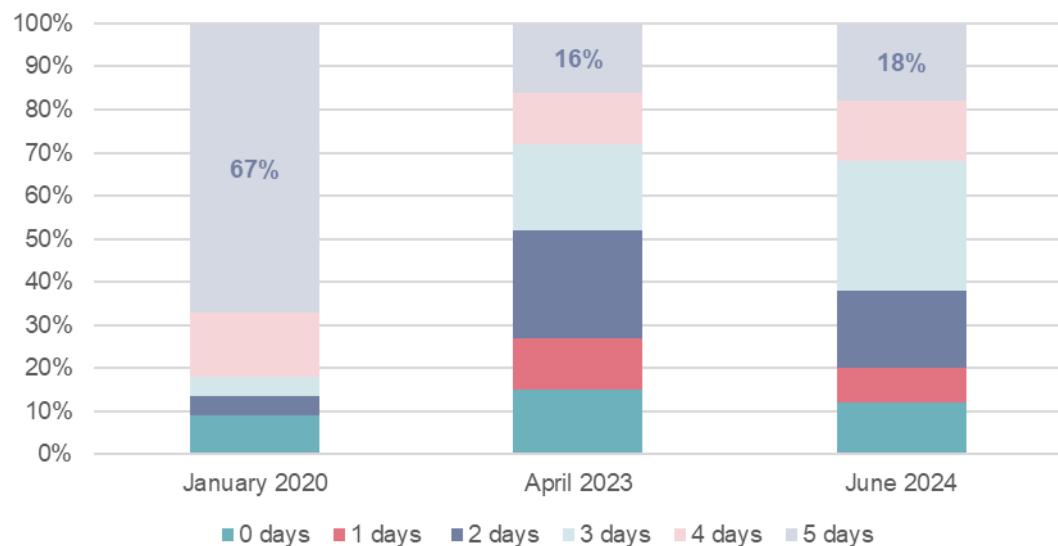
Return to the office in London

4.3

Despite the popularity and prevalence of hybrid and homeworking, office attendance has been slowly increasing since pandemic-caused economic restrictions were lifted. A report by Centre for Cities in 2024 found that Central London office workers now spend more than half of the week in the office.²² Larger companies, particularly those in the knowledge economy (comprising professional services, information and finance industries), tend to have lower weekly attendance.²³ As shown in **Figure 4.2**, although there has been a trend towards more attendance in the office, this has not returned to a pre-pandemic level, and the proportion of whole week attendees has only marginally increased in the year to June 2024, suggesting a plateauing of the 'return to the office' trend. This limited change suggests that whilst some attendance mandates/expectations have increased, it is very unlikely that attendance will reach pre-pandemic levels.

Figure 4.2 Office workers are spending more days of the week in the office but a full return to the office seems unlikely

Most common number of days in the office in London



Source: Centre for Cities, 2024. *Return to the office: How London compares to other global cities, and why this matters. (September 2024).*

4.4

Some employers are moving towards mandated periods of time in the office. According to recent research, the appetite for increasing the number of days in the office is greatest amongst large private sector employers. Even amongst these, and less so amongst private sector SMEs, public and voluntary sector employers, the majority of employers are not planning to increase the number of mandated days in the office and further.²⁴ Two or three days a week remains the preferred mandated office attendance.

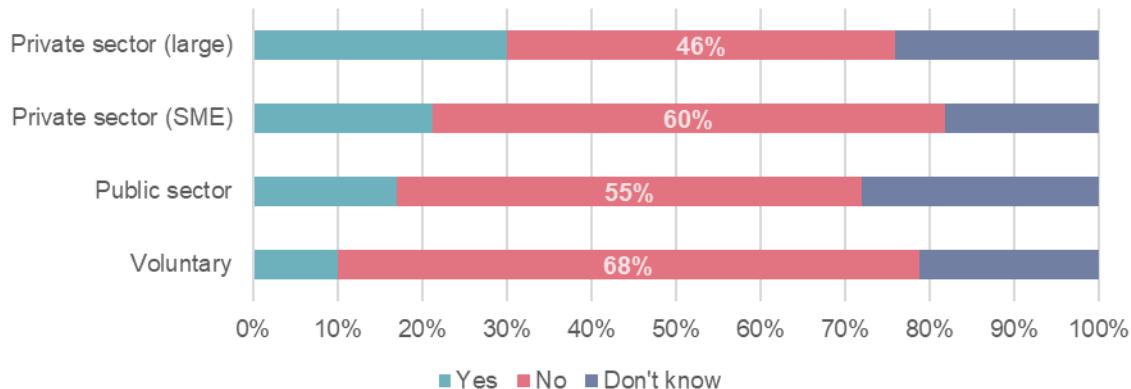
²² Centre for Cities, 2024. *Return to the office: How London compares to other global cities, and why this matters.*

²³ McKinsey, 2023. *Empty spaces and hybrid places: The pandemic's lasting impact on real estate.*

²⁴ CIPD, 2025. *What are employers' return to the office plans for 2025?*

Figure 4.3 Most employers are not planning to increase the mandated number of office attendance days beyond two to three days

Intention of employers to increase mandated office attendance days beyond their current policy, by employer size and sector (2025)



Source: CIPD, 2025. *What are employers' return to the office plans for 2025?*

The role of the office in driving return to work

4.5

Instead of solely implementing 'push factors' which require office attendance, employers are also investing in enhancing the 'pull factors' that draw employees to the office. This has prompted newfound interest in the features and amenities of office spaces. Noting that the ability to collaborate and interact face-to-face are cited as key advantages of office working, employers are considering how reconfiguring workplaces for activity-based layouts can improve the workplace experience.²⁵ In what is often referred to as the 'flight to quality', tenant demand for amenity-rich workplaces which have excellent sustainability credentials has remained strong in London. The quality of the workspace will remain an important driver for attracting and retaining talent.²⁶

4.6

To respond to uncertainty around occupancy levels, occupiers of office space have responded by increasingly seeking flexible and adaptable spaces/leases which allow for easier adjustments in the quantum of space leased as demand changes. As the flexible sector recovers from a drop in demand during the coronavirus pandemic, a host of new tenants are seeking space across the capital such as: teams moving from fixed to flexible space, bigger businesses, those seeking a more productive environment than home, and new sectors.²⁷

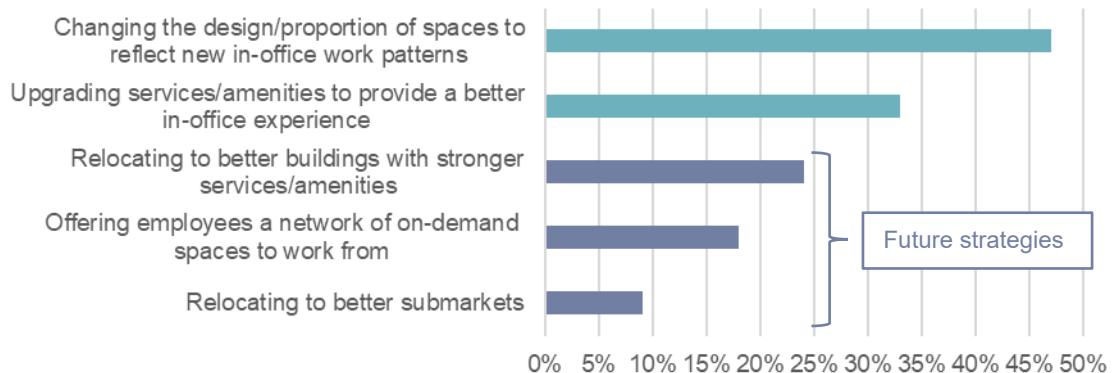
²⁵ CBRE, 2023. *Boosting Office Attendance: Selling and Delivering Workplace Value to Employees*.

²⁶ CBRE, 2024. *What does the future hold for Central London's Office supply?*

²⁷ Greater London Authority, 2023. *The impact of Covid on London's flexible workspaces report*.

Figure 4.4 Employers are recognising that the qualities of workplaces will be important to draw people back to the office

Intentions to improve workplace experiences



Source: CBRE, 2023. *Boosting Office Attendance: Selling and Delivering Workplace Value to Employees*.

Right-sizing

4.7

The changing nature of work is directly influential on demand for workspace. The pattern of relocation to premises which have become more affordable (given reduced space requirements) has led to a period of flux in the commercial property market. For occupiers whose space requirement has changed, many have reconsidered their estate portfolio, especially as leases come to an end. This might lead to 'down-sizing' into smaller premises and 'right-sizing' given a better understanding of expected occupancy and utilisation levels.²⁸ In 2023, 50% of large companies were expecting to shrink their global workspace footprint, with reductions in the range of 10 – 20%.²⁹

Case study: Less is more – BT's estate rationalisation marks one of the UK's largest ever workplace transformation programme

In what has been referred to as 'one of the largest workplace transformations the UK has ever seen', telecoms giant BT embarked on the consolidation of over 300 buildings nationwide to 30 key locations including eight major regional hubs and relocation of its headquarters.³⁰ BT vacated its headquarters building on Newgate Street in favour of a newer office building at One Braham, Aldgate. Many smaller offices and sites across outer and suburban business parks were vacated. The overall transformation programme would retain the same number of jobs, with the same 3,500 employees accommodated at One Braham using fewer desks, to encourage agile working. Designing the workspace profile for improved utilisation, consolidation of teams under one roof, in smaller but qualitatively improved floorspace is reflective of the wider trend to simultaneously reduce operating costs whilst improving staff satisfaction.

²⁸ Brasemann, F., Carollo, F., Payer, T., Graham, L., Tabone, S. and Baum, A., 2022. *Beyond Location: Value drivers of office space*.

²⁹ Knight Frank, 2023. *(Y)OUR SPACE 2023*.

³⁰ Insight, 2019. New BT HQ will be one of the 'largest workplace transformations ever'.

Central locations

4.8 In what has been termed 'economic urbanisation', the centralising trend of businesses has attracted concern that a process of polarisation and redundancy is beginning to gain traction.³¹ This reflects the enduring and increasing demand for best-in-class office space in central locations. Assets in peripheral locations which are undesirable or unviable to upgrade in terms of quality and energy efficiency, could become stranded assets. This trend is affecting many office locations across the capital which are not within or adjacent to the City.

'It seems unlikely that the office will 'die'. However, this sector is undergoing unprecedented change. It is being challenged simultaneously by two other separate long term trends as well as shifts in working patterns. The end result looks set to be a smaller, higher-quality stock which is more concentrated in certain locations.'³²

4.9 The Central London office market was described by Cushman and Wakefield as being particularly strong in 2024, especially with regard to Grade A floorspace which comprised 65% of leasing activity. Overall take-up of space was 1% higher than the previous year.³³ The relocation of major firms such as HSBC to central London is emblematic of trends in the office rental market.

Case study: Smaller, greener, central and more flexible – HSBC's relocation is emblematic of trends in the office market in Central London

HSBC, one of the world's largest banks, announced in 2023 that it will relocate its global headquarters from 8 Canada Square in Canary Wharf to Panorama St. Pauls in the City of London (the since heavily renovated building that was vacated by BT). The occupation of the new office development is scheduled to complete in 2027, when the existing lease at Canary Wharf ends. HSBC has taken the opportunity of the expiry of its lease to move its London-based staff towards the centre of London.

The relocation will mean that the bank will occupy 45% less space than it currently does, now leasing 52,000m² in the City compared to the more than 93,000m² at the existing Canary Wharf tower. This has been inspired by a desire to downsize its footprint in response to reviews of estate utilisation, being closer to clients and nationally-connected transport infrastructure, sustainability (with the office space achieving BREEAM Outstanding), and consolidation of teams into a collaboration enabled modern workspace.

Central London's attractiveness to major global firms remains unmatched. HSBC's decision to vacate Canary Wharf in favour of a central, transport-rich, and sustainable location underscores the city's

³¹ Montagu Evans, 2024. Future Shock: The Coming Wave of Office Obsolescence.

³² Montagu Evans, 2024. Future Shock: The Coming Wave of Office Obsolescence.

³³ Cushman and Wakefield, 2025. Central London Office Market Defies Economic Challenges With Robust Leasing And A Positive 2025 Forecast.

continued gravitational pull for high-value occupiers. The move typifies the trend of professional services firms down-sizing and shifting from outer sub-markets to more central hubs.

4.10 This example illustrates more widely how locations which were historically popular with occupiers and thriving business districts have evolved over time. Canary Wharf has notoriously been undergoing a period of change where alternative uses are being introduced (such as lab space, residential uses including co-living, and leisure offers) are replacing and complementing core employment uses. The need for key employment locations to evolve clearly applies to even the most famous business districts in London.

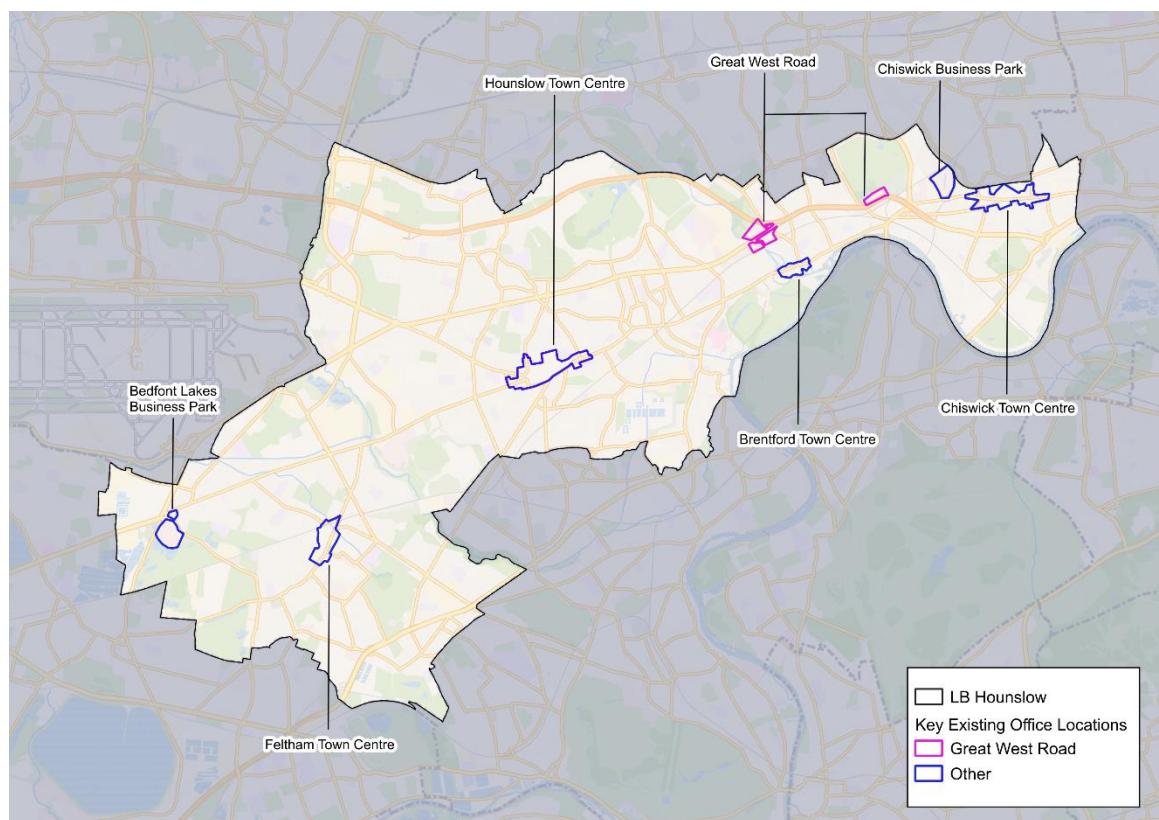
5. The role of 980 Great West Road in the Great West Road KEOL

Key Existing Office Locations

5.1 There are seven KEOLs in LBH³⁴, as shown in **Figure 5.1**. The KEOL designation was established to protect the supply of large office premises across the borough. LBH's KEOLs accommodate 27% of the borough's office premises and 54% of the office floorspace.³⁵ These areas cover the four main town centres of LBH and business parks and strategic business locations in more peripheral locations. The rationale for designating KEOLs is unclear within planning policy and supporting evidence. The designations have been in place since the Local Plan 2015-2030 which indicates that the rationale for their designation may no longer be based on the most recent evidence.

Figure 5.1 There are seven KEOLs in LBH

The location of KEOLs



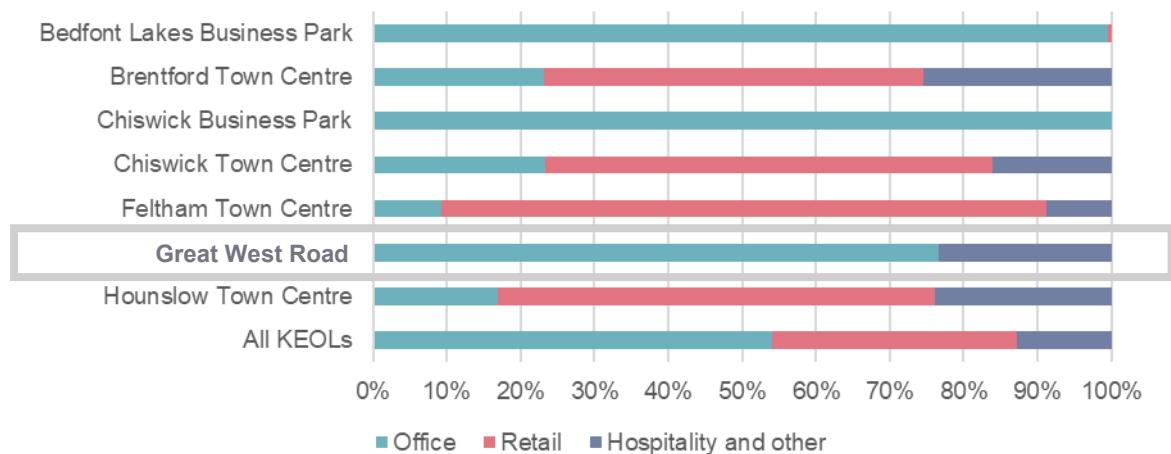
³⁴ Some KEOLs, such as Great West Road, and Bedfont Lakes Business Park are not contiguous in extent, and cover more than one area.

³⁵ CoStar, 2025.

5.2 The KEOL designation does not relate to the homogeneity of office use within the respective boundaries because many of the KEOL areas have numerous alternative uses. This is especially the case for the four town centres which host a large variety of employment, leisure and retail uses. When considering all of LBH's KEOLs, only around half of the floorspace contained within respective boundaries is in office use. A breakdown of the employment floorspace in each KEOL is shown in **Figure 5.2**. This does not account for the residential uses which also exist within KEOL boundaries, which would reduce the proportion comprising office space further.

Figure 5.2 Only around half of the employment floorspace within KEOLs is in office use

Employment floorspace in KEOLs by use (%)

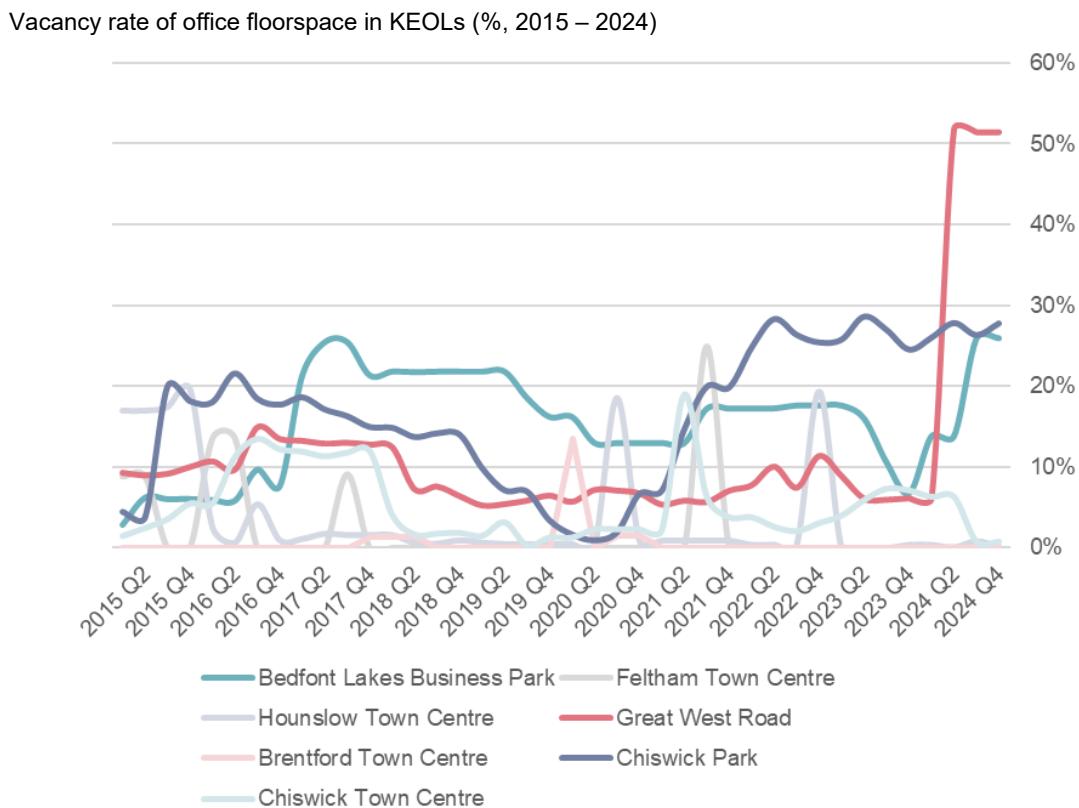


Source: CoStar, 2025.

5.3 In any case, a designation which promotes homogenous uses is at odds with modern thinking on mixed-use neighbourhoods. The space requirements for large headquarters-scale premises mean that it is the peripheral business parks and strategic business locations (Great West Road, Chiswick Business Park, and Bedfont Lakes Business Park) where such premises are hosted. Multiple challenges threaten the potential for these undiversified locations to contribute to the regional and national economy in future. Firstly, occupiers are rationalising their estate portfolio to respond to reduced floorspace requirement due to lower (hybrid) worker attendance, yet these KEOLs are characterised by large floorplates. Uncertainty around space utilisation and occupancy means occupiers require adaptable space that facilitates scaling, yet many of the offices in KEOLs are designed with specific headquarters occupiers in mind. To attract and retain talent, occupiers want to provide their workforce with amenity-rich environments, yet these KEOLs lack on-site or nearby accessible amenities, and often have poorer public transport accessibility.

5.4 These effects seem to set the health of the office market in KEOLs in peripheral locations apart from that in the town centres. The vacancy rate for offices was particularly high in Q4 2024, which has persisted and broadly increased since 2020. Vacancy rates of offices in the town centre KEOLs are consistently very low or near zero; when office space does become vacant, it is not vacant for very long.

Figure 5.3 Offices in peripheral KEOLs tend to have much higher vacancy rates



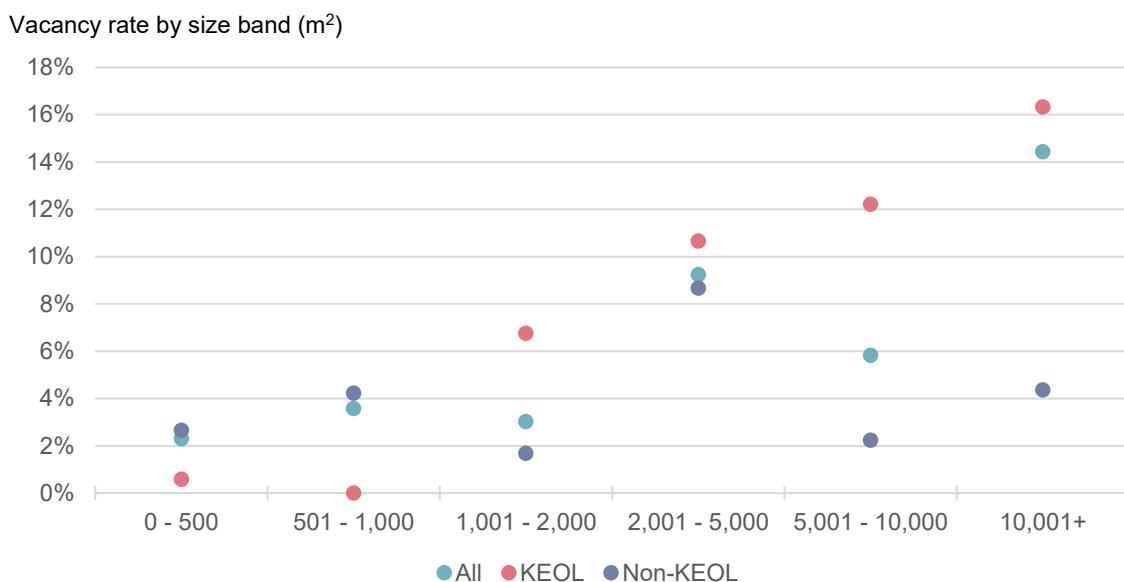
Source: CoStar, 2025.

5.5 LBH's KEOLs which have previously hosted headquarters of large organisations across large floorplates are seeing occupiers relocate out of their premises to locations in Central London. GSK and Dell, former residents within the Great West Road KEOL have recently vacated their premises. Interrogation of the vacancy rate of offices by floorspace size shows a clear trend that larger floorplates tend to have higher vacancy rates on average. This is especially the case within KEOLs, where the largest floorplates indeed have the highest vacancy rates.

5.6 Although there are fewer floorplates larger than 10,000m² outside of KEOLs, of the floorspace which is part of properties of 10,000m² in KEOLs, over 16% is currently vacant, which is at a considerably higher rate than the equivalent 4% of the large premises outside of KEOLs. The clear trend that within KEOLs larger floorplates have a greater proportion (higher vacancy rate) of space vacant and available, suggests that the designation that aims to protect certain properties in LBH may be doing so in contradiction to market signals about demand. In potentially undermining the adaptability of the site, there could be an opportunity cost if alternative uses which could generate greater economic and social value are not pursued. Vacant properties themselves impart disbenefits through blight, diminished vibrancy, and discouragement of investment that perpetuates higher vacancy.

This phenomenon is not unique to LBH. Similar areas of London are experiencing the same challenges (see below case studies).

Figure 5.4 Larger office floorplates have higher vacancy rates in LBH, particularly in KEOLs



Source: CoStar, 2025. Note this analysis focusses on vacant available space.

Case study: London's 'third city' adapted to office decline through residential-led regeneration

Croydon's evolution exemplifies how peripheral London office markets have struggled to retain their business appeal and have subsequently shifted toward mixed-use redevelopment. Once a prominent satellite commercial centre marketed as London's 'third city'. Croydon's fortunes have fluctuated in line with the capital's broader economic geography and changing demand for office space.

By the 1990s and 2000s, Croydon began to experience a marked decline in its office market. Much of the stock had become dated and did not meet modern occupier requirements for sustainability, flexibility, or quality. Competing locations such as Stratford, Paddington, and more recently, White City, offered newer developments with stronger placemaking, integrated retail and leisure, and, crucially, better alignment with the growth of knowledge and tech industries.

As vacancy rates rose, Croydon's office landlords increasingly struggled to attract or retain anchor tenants. This was compounded by the wider decentralisation of government departments and the restructuring of financial services. The focus has shifted toward building a more balanced mix of uses, underpinned by enhanced public realm and improved transport connectivity. Croydon's experience is instructive for the Great West Corridor and other peripheral districts, showing both the risks of stagnation and the potential for reinvention through diversified, place-based strategies.

Case study: Hammersmith now has weaker office demand

For decades, Hammersmith town centre attracted multinational corporations, particularly in the media, technology, and consumer goods sectors, who were drawn by relatively low rents, good Underground connections, and proximity to Heathrow. The district developed a strong business identity, with buildings such as 1 Lyric Square and The Ark symbolising its commercial success.

However, over the last decade, Hammersmith's office market has faced rising challenges, many of which echo those now emerging along the Great West Corridor. One of the key issues has been the departure of major corporate occupiers. Firms such as Disney, L'Oréal, and Coca-Cola, once headquartered in the area, relocated to more central or better-connected locations. Part of Hammersmith's difficulty lay in the ageing nature of its office stock. Much of the available space, while well-located, was becoming increasingly uncompetitive in terms of floorplate efficiency, digital infrastructure, and energy performance. Hammersmith's recent history shows how reliance on legacy office stock and high-profile tenants is no longer a sustainable model.

Landlords of the newest largest stock have explored ways to appeal to a wider range of occupiers through adapting floorplates for lab space, with varying degrees of success. There remains high levels of vacancy, and the threat of redundant space is at risk of rising due to the pipeline of developments in new mixed-use districts at Olympia, Earl's Court, and White City.

Great West Road KEOL

5.7

The Great West Road KEOL extends to an area of around 16 hectares. The KEOL boundary covers plots to the west of the intersection of the M4 and Great West Road where they meet/diverge near to Brentford railway station. An additional parcel of land between the M4 Chiswick Flyover and Gunnersbury Park is also included within the KEOL boundary. The area hosts typically large-scale headquarters-type office premises on plots with adjacent car parking. Although formerly home to GSK and Dell, these occupiers have now vacated premises and relocated to Central London. A notable portion of the former office stock has been, or is planned to be, converted to residential uses.

5.8

Despite the operational employment floorspace within the KEOL being primarily in office use, the actual use profile once residential properties are taken into account is becoming less homogenous, and the proportion of employment-generating land use is gradually decreasing. A number of residential developments have come forward within the Great West Road KEOL in recent years, each of which removed or will remove a quantum of office floorspace from the total quantum contained in the KEOL:

- In June 2020, 166 apartments were delivered at Great West Plaza;
- In September 2021, 288 residential units were delivered at the Parkview residential redevelopment;
- Permitted development granted for the conversion of the Dell Tower into 206 residential units;
- Change of use of One Brentside Park to Use Class F1 (educational facility);
- Change of use of Three Brentside Park to a private hospital;
- The conversion of Vantage London to 178 residential units was granted planning approval;
- Permitted development granted for Great West House to provide 110 residential units at Gw2, and 153 residential units at Gw1 (although it is unclear whether this has yet been implemented); and
- 995 Great West Road is currently vacant and is actively being marketed for a new tenant with redevelopment opportunities earmarked.

5.9

Recent permissions will have the concurrent effect of reducing the overall quantum and proportion of office floorspace within the KEOL. **Figure 5.5** shows how the recent permissions could spatially affect the quantum of space within KEOLs which remains in office use, if implemented. Once these developments

have completed, there will be no office space in the easternmost parcel of the KEOL, and very little in the central southeastern portions. It is unclear how applicable the allocation will be in future, and the boundary would likely need to be revised or removed when it is next reviewed.

Figure 5.5 The Great West Road KEOL is located within a varied patchwork of employment uses, and many of the uses within the Great West Road KEOL itself have been or could be converted from office to residential, healthcare and educational uses

Employment uses within 1km of the Great West Road KEOL



Source: CoStar, 2025. Volterra analysis of recent permissions.

5.10

A defining characteristic of KEOLs within policy, which is used to justify their allocation, is that 'offices in these locations make a significant contribution to the local and regional economy'.³⁶ The diminishing popularity of the KEOL as an office location, high vacancy rates, and recent redevelopment to alternative

³⁶ LB Hounslow, 2015. Local Plan.

uses means the contribution of the Great West Road KEOL to the local and regional economy is limited. This can be demonstrated by considering two scenarios:

- **Scenario 1 – The Great West Road KEOL is at full employment capacity:** assuming the floorspace for the buildings identified in **Figure 5.5** is entirely in office use (i.e., prior to the office to residential conversions) at 100% occupancy; and
- **Scenario 2 – The Great West Road KEOL is characterised by its current status:** assuming the occupancy levels of the remaining office buildings reflect their actual occupancy rate in Q4 2024, and that those buildings which have been, or are permitted to be, converted into residential properties are no longer considered to be employment generating.

5.11

In the absence of detailed information on the amount of jobs supported by the remaining office space within the KEOL, an average employment density is applied to the identified office floorspace. This provides an estimate on the likely potential contribution of the offices in the KEOL to LBH employment. From a planning perspective, it is increasingly difficult to understand the employment densities of office spaces where hybrid working and staggered attendance means that floorspaces support jobs in a more complex way to traditional employment density approaches based on the space requirement per employee. By the time the site was vacated, desk occupancy on a typical day was as low as 20%. Nonetheless, a ready reckoner approach, applying an employment density of one FTE per 13m² derived from HCA Employment Densities Guidance³⁷ gives a reasonable estimate of the level of employment supported.³⁸ An adjustment based on the degree of part-time work of office-based workers³⁹ in LBH is made to derive number of jobs.⁴⁰

5.12

Based on this analysis, the Great West Road KEOL is considered to support only 9% of its theoretical employment capacity, in terms of office jobs within office space on-site (**Table 5.1**). At the current occupancy level of the remaining office floorspace, the Great West Road KEOL will now support just 3% of all office-based employment in LBH, and only 1% of all employment in LBH.

5.13

In comparison to a scenario prior to the office-to-residential conversions and assuming full development occupancy (Scenario 1) following the office-to-residential conversions and considering current occupancy rates (Scenario 2) a decrease in 12,000 jobs occurs. This demonstrates the extent to which the Great West Road KEOL is no longer fulfilling its original policy objective of making “*a significant contribution to the local and regional economy*”⁴¹ This is due to the multitude of macroeconomic factors presented in this report for which local government policy is very unlikely to be able to affect.

5.14

In this sense, the Great West Road KEOL designation is no longer appropriate for the current makeup of the area.

³⁷ Homes and Communities Agency, 2015. Employment Densities Guide.

³⁸ The HCA Employment Densities Guide is now withdrawn although is still used industry-wide for estimating employment from floorspace, and it is considered reasonable to use in the absence of local employment density information.

³⁹ The definition of office-based jobs is derived from Arup/Knight Frank, 2023. Future of Office Use. The definition includes the following Standard Industrial Classification (SIC) 2 code industry groups: 58: Publishing activities, 59: Motion picture, video and television programme production, sound recording and music publishing activities, 60: Programming and broadcasting activities, 61: Telecommunications, 62: Computer programming, consultancy and related activities, 63: Information service activities, 71: Architectural and engineering activities; technical testing and analysis, 72: Scientific research and development, 73: Advertising and market research, 74: Other professional, scientific and technical activities, 64: Financial service activities, except insurance and pension funding, 65: Insurance, reinsurance and pension funding, except compulsory social security, 66: Activities auxiliary to financial services and insurance activities, 68: Real estate activities, 69: Legal and accounting activities, 70: Activities of head offices; management consultancy activities, and 84: Public administration and defence; compulsory social security.

⁴⁰ Office for National Statistics, 2024. Business Register and Employment Survey 2023.

⁴¹ LB Hounslow, 2015. Local Plan.

Table 5.1 The Great West Road KEOL will support only 9% of its theoretical employment capacity

The theoretical jobs capacity of the Great West Road KEOL at full capacity and current status (2024 Q4)

Property	Status	Office floorspace at full capacity (NIA)	Full employment capacity, jobs	Assumed office occupancy reflecting change of use or current occupancy rate	Current employment, jobs	
					Scenario 1	
980 Great West Road	Vacant	61,500m ²	4,960	0%	0	0
One Brentside Park	Converted to educational facility	2,500m ²	200	0%	0	0
Two Brentside Park	Operational	1,700m ²	140	100%	140	140
Three Brentside Park	Change of use to private hospital	1,700m ²	140	0%	0	0
Four Brentside Park	Operational	2,700m ²	210	100%	210	210
Great West Plaza	Converted to residential	10,500m ²	840	0%	0	0
Great West House	To be converted to residential	14,500m ²	1,200	0%	0	0
The Mille	Operational	12,400m ²	1,000	80%	801	801
995 Great West Road	Vacant	2,600m ²	210	0%	210	210
Parkview	Converted to residential	27,000m ²	2,200	0%	0	0
Dell/EMC Headquarters	To be converted to residential	15,000m ²	1,200	0%	0	0
Vantage London	To be converted to residential	11,500m ²	910	0%	0	0
Great West Road KEOL	-	163,100m²	13,200			1,150

Source: CoStar, 2025. Homes and Communities Agency, 2015. Employment Densities Guide. Note: figures may not sum due to rounding.

6. How 980 Great West Road can support employment in future

Trying something new: the demand for a variety of employment spaces

6.1 The current lack of flexibility and 'mono-culture of employment uses' in the Great West Corridor has been identified as a barrier to innovation and deterrent for key sector occupiers such as creative, digital, life sciences and knowledge-based sectors. Thinking around sustainable urban development focuses on the benefits that mixed use regeneration can deliver in terms of economic resilience and diversification. Over-reliance on a single type of occupier or industry can make the productivity of employment sites vulnerable to economic downturns. Innovation on the other hand requires a more dynamic business ecosystem in terms of industries and business sizes which are interrelated through proximity, knowledge overspill and local supply chains.

6.2 The gradual conversion of industrial/employment locations across London into mixed residential and employment sites can be especially successful where the existing site is suffering from weak demand, and where trying something new can reinvigorate local employment.⁴² In West London, a more polycentric model of development is needed so that the sub-region continues to forge an identity and role in the capital's economy, and 'reach its potential'.⁴³ 'Huburbs' where people live as well as work retain value for local people through spending, wages and appropriate workspace for setting up and doing business that minimises lengthy commutes.⁴⁴

What type of space can work in a mixed-use setting?

6.3 The former London Legacy Development Corporation (LLDC), whose mixed use approach to development of the Queen Elizabeth Olympic Park (QEOP) has been one of the capital's most renowned successful regeneration stories, developed a framework of employment use type compatibility. This considered which employment uses would be compatible with residential uses over a range of scales of development from the building to neighbourhood (**Figure 6.1**). At the block scale, small offices, large offices, and studios are most compatible with residential uses.

⁴² Centre for Cities, 2022. Making places: The role of regeneration in Levelling Up.

⁴³ Centre for London, 2025. West London's Growth Potential: Leveraging the opportunity for a more polycentric city.

⁴⁴ Greater London Authority, 2023. The Impact of Covid on London's Flexible Workspaces. Part B: Technical Appendices, Full Survey Findings and Analysis.

Figure 6.1 The LLDC considered offices and studios to be most compatible with residential uses at the block level

Workspace compatibility with residential uses

Workspace type	Mix at neighbourhood level	Mix at block level	Mix at building level
Small office			
Large office			
Studio			
Small industrial			
Large industrial			
Yard			

	Mix possible, with few design considerations
	Mix possible, with increased design considerations
	Mix possible, with considerable design considerations
	Mix not possible/not supported

Source: LLDC, 2015. LLDC Employment Space Study.

6.4

A similar exercise was conducted to appraise the compatibility of workspaces with other workspaces uses over different spatial scales. This is shown in **Figure 6.2**. At the block scale, small offices, large offices, studios and small industrial uses are most compatible with each other. Hybrid workspaces (which contain a mix of uses and allow for various functions within a single premises) are highlighted within the Employment Land Review Update as being important for securing resilience of commercial premises.⁴⁵

Figure 6.2 The LLDC found offices, studios and small industrial uses to be most compatible at the block level

Workspace compatibility with other workspace uses

Workspace type	Mix at neighbourhood level	Mix at block level	Mix at building level
Small office			
Large office			
Studio			
Small industrial			
Large industrial			
Yard			

⁴⁵ LB Hounslow, 2024. Employment Land Review Update.

	Mix possible, with few design considerations
	Mix possible, with increased design considerations
	Mix possible, with considerable design considerations
	Mix not possible/not supported

Source: LLDC, 2015. LLDC Employment Space Study.

6.5 The Employment Land Review Update remains optimistic about the opportunities afforded by industrial intensification and co-location for increasing the efficiency of use of land, despite mixed success to date.⁴⁶ The regeneration of 980 Great West Road has the potential to deliver intensification of a 'mono-culture' site across each of the four dimensions of intensification:

- **Spatial:** describes the intensification of land use including the provision of new use classes;
- **Economic:** describes attracting higher value added uses through changing workplace accommodation;
- **Process:** describes the improvement of technologies and facilities sharing to improve efficiencies; and
- **Urban:** describes the improvement in contribution of land to quality of the urban realm.⁴⁷

6.6 **Figure 6.3** shows how different methods can be used to intensify features of workspace, and how effective these could be expected to be in London. For example, the introduction of smaller units would lead to intensification of the number of business units and businesses. The development of multi-storey schemes would deliver intensification of floorspace, business units and flexibility of space.

Figure 6.3 The introduction of smaller units delivers intensification of business units and businesses

The measures of intensification delivered through different methods

	Development of mezzanines	Introduction of smaller units	Development of multi-storey schemes	Addition of basements	More efficient use of land through plot ratios
Floorspace					
Operational yard space					
Business units					
Average unit size					
Mezzanine space					
Flexibility of space					
Jobs					
Businesses					

⁴⁶ LB Hounslow, 2024. Employment Land Review Update.

⁴⁷ Greater London Authority, 2018. Industrial Intensification and Co-location Study.

	Development of mezzanines	Introduction of smaller units	Development of multi-storey schemes	Addition of basements	More efficient use of land through plot ratios
Efficiency/revenue					
Urban improvements					

	Delivers
	Possibly delivers
	Does not deliver

Source: Greater London Authority, 2018. *Industrial Intensification and Co-location Study*.

What space is in demand?

6.7 Interrogation of the types of space currently in demand provides a helpful starting point for determining the appropriate amount of commercial floorspace that could be delivered and taken up in a new development. Net absorption is an indicator of the demand for commercial floorspace and the strength of the commercial property market. It represents the change in occupied floorspace over a given time period. This reflects whether the amount of occupied space is expanding or contracting, accounting for new completions, new leases and move-outs. Negative net absorption shows that more space is vacated than newly occupied. Consistently negative net absorption means the market is unlikely to take-up new supply. Where this is paired with a rising vacancy rate it is indicative that existing space is sitting empty (oversupply). By disaggregating net absorption by property characteristics such as type and size, it is possible to assess the appropriateness of such properties for delivery in terms of the likelihood of these being in demand and therefore taken up.

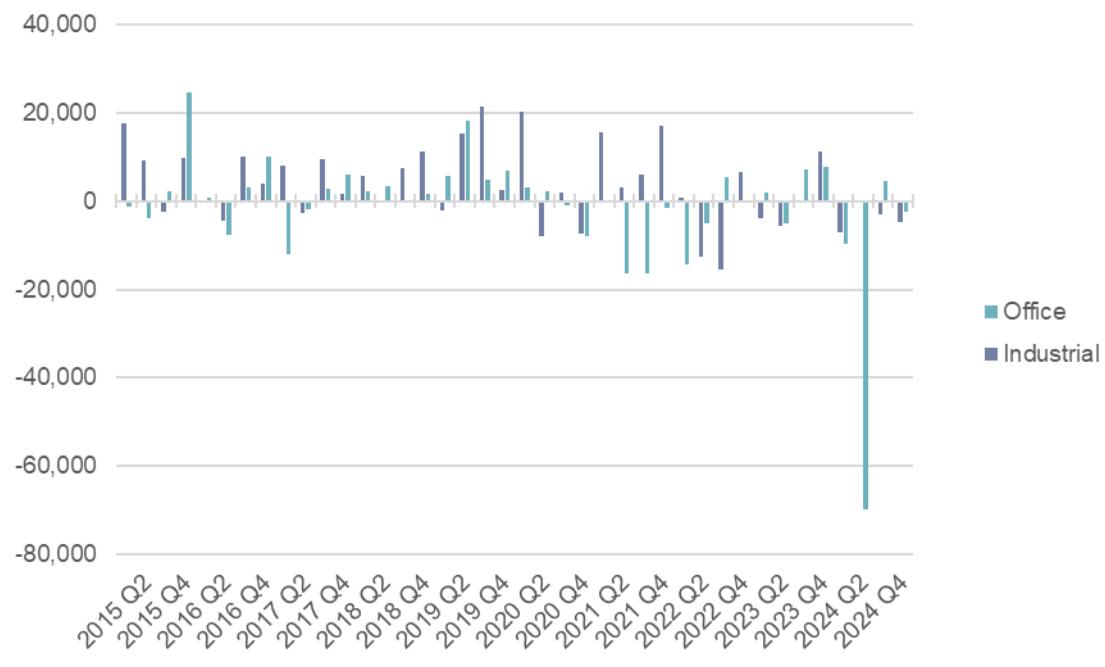
6.8 Since 2020, net absorption of office properties in LBH has been regularly negative.⁴⁸ This is shown in **Figure 6.4**. The implication is that new office space should necessarily offer something different to the existing stock and potentially a more steady or cautious approach to delivering new floorspace should be considered. This is because large volumes of new space, when matched with weak demand as demonstrated in LBH, could exacerbate issues with vacancy. It is appropriate in this instance to bring forward space which is phased and able to respond to prevailing trends at the time of delivery, and flexible to be able to be converted to suit needs.

6.9 The trend in net absorption of industrial floorspace in LBH is somewhat similar to the trend for offices reflecting that these properties are located within the same locations and therefore subject to similar spatial variations in demand. Despite this, there have been more quarters in recent years where industrial properties have recorded a (higher) positive net absorption. Where net absorption has been negative, the quantum of industrial floorspace tends to be of a smaller magnitude than recorded for offices.

⁴⁸ CoStar, 2025.

Figure 6.4 Net absorption of office properties in LBH has been negative in recent years

Net absorption of office and industrial floorspace in LBH (m², 2015 – 2024)



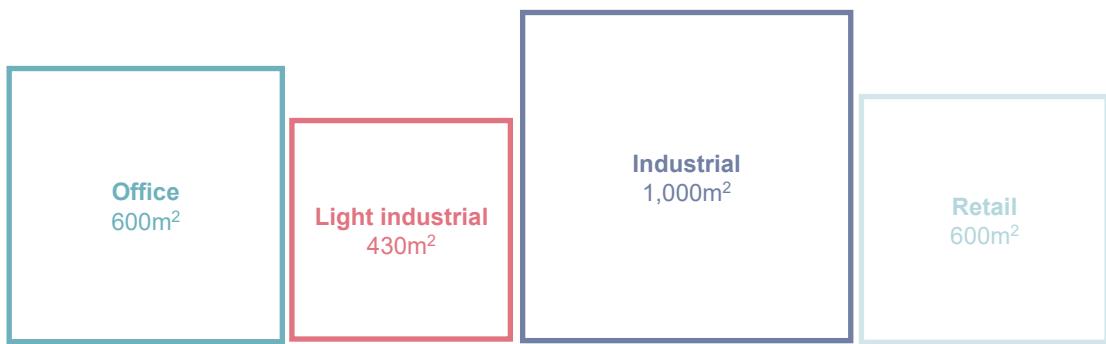
Source: CoStar, 2025.

6.10

There were nearly 600 recorded leasing events across office, light industrial, industrial and retail commercial properties in LBH since March 2020 (the previous five years), comprising around 390,000m² of floorspace involved in leasing activity.⁴⁹ The average amount of floorspace leased over this time period per event was 600m², although this varied by type, as shown in **Figure 6.5**.

Figure 6.5 The average floorspace quantum leased in LBH since 2020 is around 600m²

Average leasing event floorspace, by use type (m², March 2020 – March 2025)



⁴⁹ CoStar, 2025.

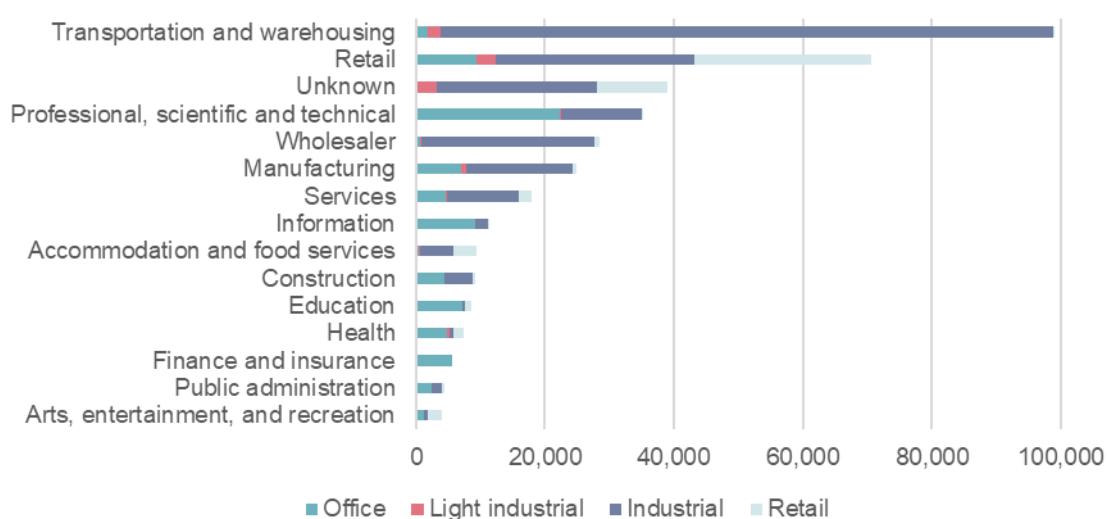
Source: CoStar, 2025.

6.11

By disaggregating leasing activity by sector and building type it is possible to establish the types of space currently in demand amongst occupiers operating in each of these industries. In LBH in the five years to March 2025, the majority of leasing activity comprised industrial space being leased by the transportation and warehousing sectors. Office space was primarily leased by companies within the professional, scientific and technical sector. With the exception of logistics-focussed industries such as transportation, warehousing and wholesalers, most sectors require a range of premises types, as reflected in the mix of leasing activity.

Figure 6.6 Leasing activity in LBH is dominated by the transport and warehousing sectors' demand for industrial floorspace

Leasing activity by sector and building type (m², March 2020 – March 2025)



Source: CoStar, 2025

Which sectors could be suited to 980 Great West Road?

LBH has growing industrial specialisms

6.12

The UK's modern industrial strategy highlights eight growth-driving sectors which will play an essential role in productivity growth: advanced manufacturing, clean energy industries, creative industries, defence, digital and technologies, financial services, life sciences, and professional and business services.⁵⁰ The emerging LBH Local Plan review similarly highlights in the updated vision for economic growth and inward investment in the borough how digital and media (anchored by the BSkyB campus and Chiswick Business Park), hi-tech, telecommunications and pharmaceuticals will be important players in the future regeneration of the Great West Corridor. The creative industries will also play a key role catalysed by the Creative Enterprise

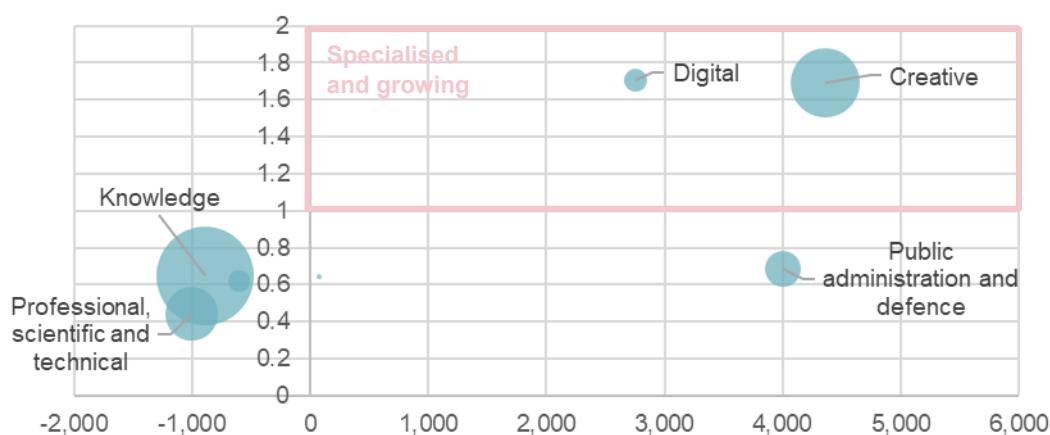
⁵⁰ Department for Business and Trade, 2024. Invest 2035: the UK's modern industrial strategy.

Zone designation, along with enterprises driven by the expansion of further and higher education, and green industries associated with a Green Innovation and Enterprise Hub.

6.13 Definitions using Standard Industrial Classification (SIC) codes of the creative⁵¹, digital⁵², advanced manufacturing and engineering⁵³, public administration and defence⁵⁴, knowledge⁵⁵, life sciences⁵⁶, and professional, scientific and technical⁵⁷ sectors are used to investigate their respective roles in driving employment growth, and setting LBH's economy apart from the rest of London. This is shown in **Figure 6.7**.

Figure 6.7 The growing creative and digital sectors set LBH apart from London

Location quotient and change in employment in LBH in 'growth-driving sectors', where the bubble size reflects the amount of employment in 2023



Source: Office for National Statistics, 2024. Business Register and Employment Survey 2015 – 2023. Note that the definitions of these sectors include overlapping industrial activities and therefore the sectors are not discrete. This figure should therefore be read as indicative of the characteristics of each of the respective sectors rather than aggregated growth.

6.14 Further interrogation of the industrial activities which provide employment in LBH shows that many of the activities which set LBH apart, are those activities whose proportion of employment is above the average for London, require different types of employment space. 'Programming and broadcasting activities', likely driven in part by the BSkyB campus, are a particular specialism of LBH, and are growing in terms of employment (reflecting an additional 6,000 jobs between 2015 and 2023). These activities have been considered previously to mainly require office space⁵⁸, although evidently and as recognised by the 2024 ELR Update⁵⁹, flexible workshop/studios are also required, equivalent to 25% of floorspace demand. **Figure 6.8** highlights trends in this industrial activity group, where the red bubble indicates classification as office-based. Of the remaining industrial activities which represent a higher proportion of employment in LBH than

⁵¹ Department for Culture, Media and Sport, 2022. DCMS Sectors Economic Estimates Methodology.

⁵² Department for Culture, Media and Sport, 2022. DCMS Sectors Economic Estimates Methodology.

⁵³ Coast to Capital Local Enterprise Partnership, 2016. Advanced Manufacturing and Engineering Sector Report.

⁵⁴ The 'public administration and defence' broad industrial group is used for this definition.

⁵⁵ Kent County Council, 2025. The Knowledge Economy.

⁵⁶ UK Parliament, 2021. Life Sciences Sector Report.

⁵⁷ The 'professional, scientific and technical' broad industrial group is used for this definition.

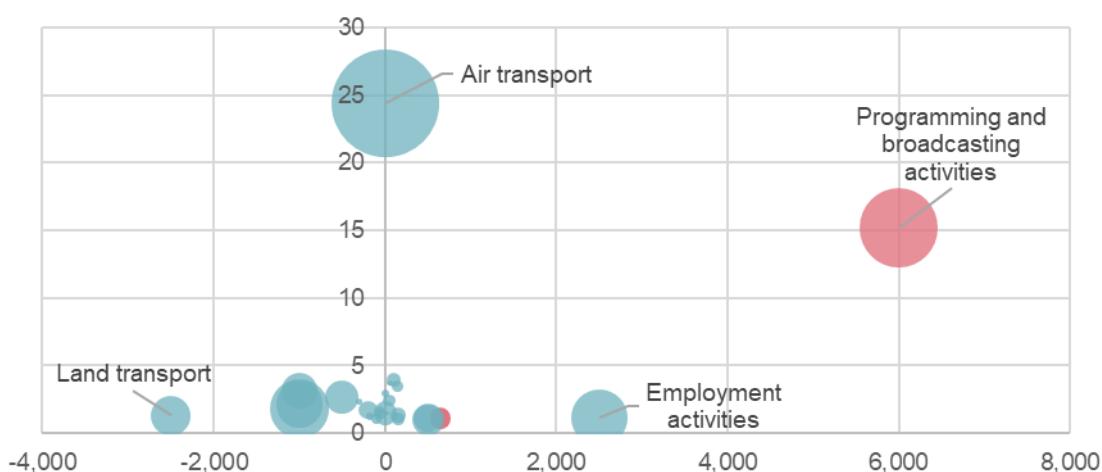
⁵⁸ Arup/Knight Frank, 2023. Future of Office Use.

⁵⁹ LB Hounslow, 2024. Employment Land Review Update.

is typical for London (i.e. have a location quotient over 1), the vast majority require non-office space such as specialist industrial, retail or other workspace.

Figure 6.8 Only some of the growing employment in industrial activities which set LBH apart from London is traditionally office-based

Change in employment (2015 – 2023) in industrial activities with location quotient over 1 (LBH:London), where the bubble size reflects the amount of employment in 2023. Bubbles shown in red are considered to be office-based.



Source: Office for National Statistics, 2024. Business Register and Employment Survey 2015 – 2023. Arup/Knight Frank, 2023. Future of Office Use.

Sectors that could play a role in the economic regeneration of the 980 Great West Road

6.15

The Great West Corridor (GWC) Past, Present, Future report produced by Partnering Regeneration Development (PRD) considered which sectors that were showing persistent growth in LBH, are already present and/or would be most compatible with the future economic growth of the GWC.⁶⁰ The report identified: the creative, cultural and digital sector, and its subset components of media production and creative manufacturing; immersive entertainment and experiences; high-tech or advanced manufacturing; low carbon and green energy; and business and professional services. To align with the industrial strategy growth sectors, attention in the following discussion is also given to life sciences and knowledge economy.

⁶⁰ PRD, 2024. The Great West Corridor: Past, Present, And Future.

Table 6.1 – Sectors that have been identified as suitable for the Great West Corridor have a range of space requirements

Sector	Discussion
Creative, cultural and digital	<p>The creative, cultural and digital sector comprises '<i>those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property</i>'.⁶¹ Within these activities, media production as described by PRD focusses on those productive activities in film, TV, sound, print and digital software. Creative manufacturing includes the manufacture of tangible goods such as furniture, jewellery and printing.</p>
Media production	<p><i>Suitability to the local economy.</i> The Hounslow Creative Enterprise Zone (CEZ) was established to help develop the ecosystem of creative and digital businesses in Hounslow, and the Great West Corridor is one of the UK's main epicentres of creative production. The creative industries are particularly poised to support mixed use regeneration. Not only are creative production activities often compatible with residential uses⁶², their activation of streetscapes can also encourage local spending, dwelling and patronage of other businesses. In bringing industrial production into sight, rather than on disconnected sites, exciting and activated neighbourhoods become more inclusive, cohesive and liveable. Recognising this, the Old Oak and Park Royal Development</p>
Creative manufacturing	<p>Corporation (OPDC) for example is taking the approach of 'increasing the visibility of making' in celebration of the productive industries which support the London economy.⁶³</p> <p><i>Space requirements.</i> Typically the needs of the creative industries have been mapped against office space, when the requirements are far more varied.⁶⁴ The creative industries' activities require a mixture of spaces, including small creative studios (between 11 and 32m²), large creative studios (32 to 500m²) and small industrial spaces (500 – 1,000m²).</p>
Immersive entertainment and experiences	<p>Overlapping with the tourism, creative and night-time sectors, these entertainment and experience economic activities are '<i>a form of creative consumption based around live events such as escape rooms, film/TV studio tours, or VR gaming</i>'. There has been a long emerging trend, accelerated by increased levels of online shopping, regarding diversifying leisure and retail to a more experientially focussed offer. This also aligns with the emergence of the experience economy more broadly.</p> <p><i>Suitability to the local economy.</i> The prevalence of broadcasters and media production businesses based in West London means there are potential synergies relating to locally-sourced intellectual property.</p> <p><i>Space requirements.</i> These activities require a broad range of spaces depending on the nature of the entertainment or experiences ranging from retail outlets (diversified shopping centre offers) to large visitor attraction scale premises (repurposed film studios or theme parks). It is necessary for spaces to be able to be fitted out spaces to a variety of very specific occupier needs.</p>

⁶¹ Department for Culture, Media and Sport, 2013. Classifying and Measuring the Creative Industries.

⁶² West London Alliance, 2021. Affordable Workspace Study.

⁶³ Old Oak and Park Royal Development Corporation, 2023. Industrial Supplementary Planning Document.

⁶⁴ Greater London Authority, 2024. Designing Space for Culture.

Sector	Discussion
High-tech or advanced manufacturing	<p>The advanced manufacturing sector is seen as a future driver of productivity and growth nationally, aligning with the UK's modern industrial strategy.⁶⁵ It encompasses '<i>production processes that integrate advanced science and technology, including digital and automation to manufacturing</i>'.⁶⁶</p> <p>Suitability to the local economy. The highly innovative activities within the advanced manufacturing sector are associated with the research and development activities that spin-out from higher education institutions. The presence of universities in West London aligns with the locational preferences of these firms.</p> <p>Space requirements. Advanced manufacturers often require workspace that is tailored to the production processes used, which is usually accommodated in general industrial, and light industrial space (in limited circumstances). This ranges from 'messy' space to laboratory or factory space. These can sometimes be incompatible with nearby residential uses, depending on the intensity (noise, pollutive) of processes.</p>
Low carbon and green energy	<p>The low carbon and green energy sector encompasses a wide range of activities aimed at reducing environmental impact and transitioning towards a sustainable, net-zero economy. It includes desk-based services such as financial and legal advice, utility supply management and R&D, alongside on-site activities like infrastructure installation and specialist manufacturing. The sector is shaped by government policy and incentives and changing consumer preferences, such as the uptake of electric vehicles, and growing societal awareness of climate change. It also spans diverse business types, from energy tech innovators to green retrofit installers, and is a core focus of the UK's emerging industrial strategy</p> <p>Suitability to the local economy. The Great West Corridor (GWC) offers a strategic platform for the growth of the low carbon and green energy sector given presence of 'green jobs' and a proposed Green Innovation and Enterprise Hub between Gillette Corner and GSK House. Synergies with the research activities of this and existing institutions mean a new sector specialism could be carved out, although this is potentially not as established currently in the immediate vicinity to 980 Great West Road.</p> <p>Space requirements. Employment space needs for the low carbon and green energy sector are highly varied due to its diversity of activities. Desk-based functions (e.g. finance, research) require high-quality office environments, ideally in well-connected urban areas. In contrast, manufacturing and installation activities are better suited to affordable industrial premises, such as warehouses or light industrial estates near transport hubs. Some businesses require technical fit-out, such as ventilation systems or R&D lab space, and many will prioritise low carbon buildings or those capable of being retrofitted to net zero standards.</p>
Business and professional services	<p>Business and professional services comprises largely desk-based activities including legal and financial services, real estate, management consultancy, office administration, and other support services. It includes both traditional firms, such as law practices or accountancy companies, as well as emerging service-based enterprises tied to digital innovation, AI, and automation.</p>

⁶⁵ UK Government, 2024. Invest 2035: The UK's Modern Industrial Strategy.

⁶⁶ Department for Business and Trade, 2023. Advanced Manufacturing Plan.

Sector	Discussion
	<p><i>Suitability to the local economy.</i> The analysis of trends in demand for office space highlight the incompatibility of mono-culture business parks dominated by large headquarters offices in this location, although there will likely be demand from a range of smaller occupiers that are closely aligned with the existing emerging local specialisms. Despite some transport connectivity issues and office vacancies, improvements such as proposed rail links and ongoing regeneration projects aim to enhance the area's competitiveness and appeal to professional service firms.</p> <p><i>Space requirements.</i> Business and professional services typically require high-quality office space, ranging from Grade A premises to more affordable, flexible office suites. Independent or early-stage firms may prefer serviced or co-working space with short lease terms, while larger firms may demand Grade A office stock with prestige appeal, collaborative areas, and strong digital infrastructure. As hybrid work models become more common, collaborative spaces and high-speed connectivity are increasingly critical. The GWC must offer a mix of traditional office buildings, flexible co-working environments, and scale-up spaces to accommodate different business sizes and preferences.</p>
Life sciences and knowledge economy	<p>Life sciences 'businesses are involved in developing and/or producing pharmaceutical or med tech products, including digital health for human health purposes'.⁶⁷ Comprising the life sciences sectors, but more broadly encompassing additional research and development and higher education activities which are knowledge-intensive, the knowledge sector can be defined as 'a group of specific sectors within the economy that are knowledge intensive in their activity. They deal extensively with information/information technology and their business is all about the distribution or exchange of the information that they hold'.⁶⁸</p> <p><i>Suitability to the local economy.</i> London is home to some of the world's best universities and research institutions. These act as key focal points for the emergence of knowledge economy clusters, and spin-out businesses are often in need of appropriate and attractive workspaces. The WestTech corridor aspirations as well as those of nearby institutions such as the University of West London and Imperial mean the suitable space and occupiers would likely be accommodated and welcomed to the area.</p> <p><i>Space requirements.</i> Life sciences in London are dominated by small, highly specialised firms which are often spin-outs from the capital's world-leading universities.⁶⁹ Both large and small companies prefer to be near to universities, although larger companies tend to be willing to lease high cost space in the most central locations. Smaller, growing companies that might have smaller space demands prefer lower cost space in more peripheral locations. The innovative nature of the life sciences sector means that specialist spaces, and those which can adapt to accommodate emerging technologies and machinery, are required. Often laboratories and offices are collectively delivered to allow for research, analysis and testing to be seamlessly conducted. Laboratories can be delivered as lab enabled spaces which are built or redeveloped so that the building can be purposed or lab ready spaces which occupiers can expeditiously</p>

⁶⁷ Office for Life Sciences, 2020. UK Life Sciences: Bioscience and Health Technology Sector Statistics 2020.

⁶⁸ Kent Analytics, 2025. The Knowledge Economy.

⁶⁹ MedCity, 2024. London Lab Showcase Med City Report July 2024.

Sector	Discussion
	<p>occupy and begin operations.⁷⁰ The life sciences sector is becoming increasingly multi-disciplinary meaning the workspaces needed and in demand are also increasingly variegated.⁷¹ As professionals (data analysts, researchers and so on) move between industries they bring expectations for activity-based working and collaboration spaces. Most of the lab space in the pipeline in London has floorplates over 190m².⁷²</p>

Source: Volterra analysis. Adapted from PRD, 2024. *The Great West Corridor: Past, Present, And Future*.

⁷⁰ Knight Frank, 2024. UK Life Sciences and Innovation: Labs Explained.

⁷¹ Savills, 2024. Beyond the lab: trends in reshaping the life sciences workplace.

⁷² MedCity, 2024. London Lab Showcase Med City Report July 2024.

7. The appropriate types and quantum of employment space at 980 Great West Road

7.1 The comprehensive regeneration of the 980 Great West Road site provides an excellent opportunity to introduce new high-quality workspace that can both be resilient to change and bring it about. This section considers the quantum and types of employment space that would be appropriate to provide as part of the redevelopment of the site.

7.2 The proposals would deliver 26,509m² of core employment-generating space. The hybrid planning application will allow for flexibility of the end uses. Initial scoping has identified a range of suggested potential uses and disregarded non-feasible/inappropriate uses. Potential uses which could be suitable on site are shown in **Table 7.1**.

Table 7.1 A range of potential uses for the employment generating floorspace have been initially found suitable and appropriate for the site

Suggested suitable and appropriate uses for the employment generating floorspace at the site, by Use Class

Use Class	Suggested uses
B2	Micro brewery
	Nano-brewery
	Multi-level industrial (including small scale)
	Furniture manufacturing
	Modern manufacturing
	Catering production ⁷³
	Food/beverage manufacturing ⁷⁴
B8	Self storage unit
	Last mile logistics
	Catering storage
	'Big box' logistics
	Multi-level logistics
	Storage of building materials
	Refrigerant storage
	Business storerooms

⁷³ Subject to scale of operation.

⁷⁴ Subject to scale of operation.

Use Class	Suggested uses
	Data centre
E(g)(i)	Co-working/incubator/studio
	Offices (small-scale/independent)
E(g)(ii)	Research and Development facilities
	Laboratories
	Life sciences centre
E(g)(iii)	Trade units
	Light manufacturing
	Workshops
	Wholesale
	Microbrewery
	Last mile urban logistics ⁷⁵
	Urban farming
	Multi-level industrial
	Professional delivery kitchen
	Makerspace

Policy context

7.3 The Local Plan (Reg 19) Chapter 12: Site Allocations document assesses the appropriate typologies of land use for Site Allocation 118 – Former GSK Site.⁷⁶ The document identifies appropriate land uses as '*E(g)(i), E(g)(ii), E(g)(iii), B2 and B8 which would support the Creative Enterprise Zone...Proposals will be expected to retain or deliver some employment floorspace, ideally including...offices*'.

7.4 Within the Local Plan Review: Volume 4: Great West Corridor document (2020)⁷⁷, the site is located within the Great West Corridor West policy area. The document highlights that a current lack of (a variety of) amenities means than its attractiveness as an employment hub is currently lacking. Policy P1 Great West Corridor West states that proposals should support '*redevelopment opportunities for high quality mixed tenure housing and employment spaces to deliver a minimum of... 52,000m² of office uses, 150,000m² of industrial floorspace, and 12,100m² of retail, restaurant, café and bar uses providing at least 5,860 new jobs in the Golden Mile Station Quarter.*'

More residents, more jobs

7.5 The relationship between population, housing and jobs underpins the approach to assessing employment needs required by planning guidance.⁷⁸ This is based on the rationale that effective planning of sustainable

⁷⁵ Subject to scale of operation.

⁷⁶ LB Hounslow, 2024. Local Plan 2020 – 2041 – Proposed Submission Version: Chapter 12 – Site Allocations.

⁷⁷ LB Hounslow, 2020. Local Plan Review: Volume 4 Submission Great West Corridor.

⁷⁸ Ministry of Housing, Communities and Local Government, 2024. Housing and economic needs assessments.

places should ensure that there are appropriate employment opportunities to sustain new populations. Economic theory has long recognised this relationship. New residential development introduces new populations and increases the labour supply, as well as the demand for goods and services. Businesses require access to a labour market that is attuned to their specific industrial/commercial activities in terms of skills and qualifications. Access to employment is a precursor for economic participation and a determinant of a population's health and well-being.

7.6 The GLA, building on research produced by Volterra, found that there is indeed a relationship between population, employment and transport accessibility in London.⁷⁹ Research found that there is a strong relationship between employment and population density in areas of low levels of accessibility. This means that areas in Outer London in particular have a high proportion of employment serving the local population. The site of 980 Great West Road has a public transport accessibility level (PTAL) rating of 2 – 3, which is relatively low on the scale of 0 (worst) to 6b (best).^{80,81} It follows that the introduction of new populations to the site would be expected to lead to additional employment in the local area.

7.7 On this basis, and recognising that sustainable development should be cognisant of the appropriate amount of employment opportunities arising from new residential development, it is possible to calculate the employment need generated by the redevelopment of the site itself. Employment need at the borough-scale is assessed by attributing population change to sector trends, amongst other macroeconomic and demographic assumptions. These forecasts feed into the floorspace/land need for employment-generating uses over the Local Plan period. A 'more residents, more jobs' approach isolates the proportion of future growth in jobs that would be contributed by the development itself, disaggregating from the whole borough need.

7.8 Due to the flexible nature of the planning submission there are a number of different variations regarding the residential component (and hence population yield) of the proposed development. The **ES Chapter 6 Socio-Economics** sets out several different scenarios for the residential component. For the assessment in this report, '**Scenario 2c** – Detailed Element + Outline Element brought forward based upon the Illustrative Masterplan' is assumed, as this scenario reflects the current most likely composition for the proposed development.

7.9 In this scenario, the regeneration of the site would deliver a total of 2,287 residential units disaggregated as:

- 1,343 C3 Residential Units;
- 142 Build To Rent Units;
- 506 PBSA Units; and
- 296 Co-living Units.

7.10 For the purposes of this assessment it is assumed that the student population would not directly lead to new jobs, although in reality a number of students may be in employment whilst studying. As set out in the **ES Chapter 6 Socio-Economics**, the assumed residential composition results in a population yield of 4,222 residents.

7.11 Based on the GLA finding that an increase in the resident population by 1,000 people has the potential to give rise to a further 171 jobs locally, the redevelopment of 980 Great West Road could lead to 722 jobs.

⁷⁹ GLA Economics, 2015. More residents, more jobs? 2015 Update. The relationship between population, employment and accessibility in London.

⁸⁰ Transport for London, 2023. Public Transport Accessibility Levels.

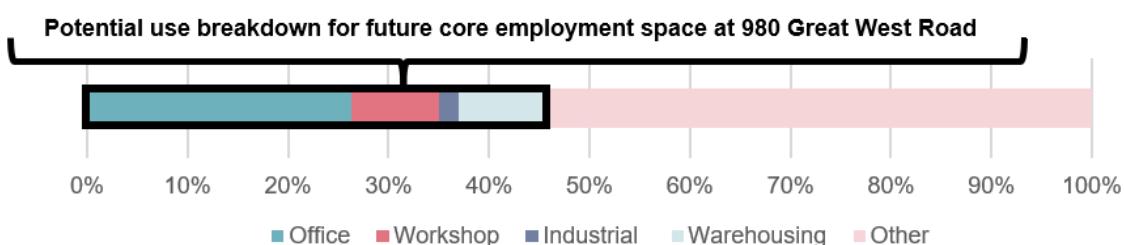
⁸¹ The range of PTAL ratings is: 0 (worst), 1a, 1b, 2, 3, 4, 5, 6a, and 6b (best).

7.12

The 2024 Employment Land Review Update provides forecasts of the increase in jobs in LBH between 2020 and 2041.⁸² It is forecast that over this period, jobs in LBH would increase by 36,700, of which 12,800 would be office-based, 700 would be in industrial activities, 3,300 would be warehousing-based, and 19,900 'other' jobs would result (which would include air transport, retail, education and health). An adjustment to reflect the split of core employment (office, workshop, industrial, warehousing) and other needs in LBH would mean that of 722 local jobs, **331 jobs**⁸³ would require core employment uses (i.e., employment uses excluding retail, F&B, and community uses).

Figure 7.1 Half of the forecast employment growth in LBH to 2041 will be accommodated in office, workshop, industrial and warehousing space

Breakdown of employment forecasts by space use type (%)



Source: LB Hounslow, 2024. Employment Land Review Update.

Existing jobs:residents ratio

7.13

Jobs density refers to the ratio of the number of jobs in an area per working age resident (aged 16 to 64). The metric is indicative of the importance of a location for supporting employment. For example, an area with a high jobs density (typically above 1) is likely to be a major employment centre which attracts people to the location to work. A low jobs density (typically below 1) would suggest workers commute elsewhere for employment opportunities. From a planning perspective, it is pertinent to consider that employment opportunities are maintained alongside population growth.

7.14

The jobs density within LBH is 0.90, meaning there are nine jobs for every ten working age residents.⁸⁴ Assuming that the population of the regenerated site has the same age profile as the borough as the whole⁸⁵, if the commercial strategy for the regeneration of the site were to ambitiously target to accommodate jobs equivalent to the existing density in LBH, this would require employment space to support 3,065 jobs. Naturally, residents of LBH commute to other locations to access work. Assuming that the out-commuting profile of the development is equivalent to the wider borough, and that 64% of those who work in workplaces commute outside of the borough for work, the amount of jobs that would accrue in LBH by this approach would be 1,975 jobs.

⁸² LB Hounslow, 2024. Employment Land Review Update.

⁸³ This refers to total employment rather than full time equivalent jobs (FTEs).

⁸⁴ Office for National Statistics, 2024. Jobs density 2023.

⁸⁵ Office for National Statistics, 2022. Census 2021.

7.15 An adjustment is applied as above to reflect the split of space needs in LBH, meaning that a possible target for employment at the site that would be proportionate would be, in core employment space, **906 jobs**.⁸⁶

Future homes:jobs ratio

7.16 Another plausible way to derive an estimate for the suitable quantum of employment floorspace at 980 Great West Road is by considering the ratio of the future need for homes in LBH against the forecasts for future employment. Ensuring 980 Great West Road comes forward in this proportion will mean the development is playing its role in contributing to both the housing and employment needs of the borough.

7.17 The Hounslow Local Housing Needs Assessment update (2024) established an overall need of 27,160 dwellings in the borough between 2020 and 2041. The Hounslow Employment Land Review Update (2024) forecasts growth of 36,700 jobs in the borough between 2020 and 2041. This results in a future homes:jobs ratio of 0.7.

7.18 The 1,343 C3 residential units, 142 build to rent units, 506 PBSA units, and 296 co-living units are converted to dwelling units by assuming each 2.5 PBSA units is equivalent to 1 home, and 1.8 co-living units is equivalent to 1 homes. These conversion ratios are established in the London Plan.

7.19 The 1,852 dwellings at 980 Great West Road would therefore imply 2,502 jobs utilising the future homes:jobs ratio of 0.7. An adjustment is applied to the 2,502 jobs to represent only those jobs which require core employment use space (i.e., not retail, F&B, and community space). That is, a 46% factor (see **Figure 7.1**) is applied resulting in a final implied jobs quantum of **1,148 jobs**.

Determining the appropriate types and quantum of employment space

7.20 To determine the appropriate types and amount of employment space that could be accommodated at 980 Great West Road, the analysis brings together the previous discussion on potential numbers of jobs to be targeted for the site, the different compatible types of space in a mixed-use regeneration taking into account typologies that would suit the needs of appropriate sectors.

7.21 The space requirement to accommodate these jobs is calculated using a standard methodology of deriving space by applying typical employment densities. As previously discussed, the use of employment densities for this purpose is problematised by hybrid working models which affect the utilisation of space.⁸⁷ The use type of commercial space (and therein the applicable employment density) is also not determined. To account for these uncertainties, a range of scenarios have been considered. **Table 7.2** summarises how from a top-down perspective (i.e. deriving floorspace requirement from known number of jobs) the types and quantum of commercial space would necessarily differ by use. Adjustments are made where necessary to

⁸⁶ This refers to total employment rather than full time equivalent jobs (FTEs).

⁸⁷ For this reason, a scenario which assumes an efficient use of office space through hotdesking has been included. This is provided to illustrate the sensitivity of the assessment to changing employment density. There is insufficient evidence to confirm how different utilisation models affect overall employment density of office space, and the appropriateness and achievability of higher densities will depend on a number of factors particular to different occupiers, such as the proportion of desk space to other/flexible areas, peak daily demand and homeworking practices. Nonetheless, for this analysis taking into account the preference for attendance in the office for between two and three days a week, assuming a random distribution of in-office days and no change in collaboration space demand, an indicative adjustment ratio of 0.6 is applied. This will suggest how an equivalent office-based employment need figure can be supported by a smaller amount of office space.

derive FTEs from jobs using the ratio of part time to full time work in the respective employment spaces.^{88,89} The assumptions that underpin the assessment of need are provided in **Appendix A**. Depending on the realised employment density of delivered floorspace, the actual amount of employment supported on-site may be different to that presented here.

7.22

The analysis considers three employment targets for core employment space jobs:

- **More residents, more jobs:** this scenario assumes that 980 Great West Road will accommodate 331 jobs;
- **Existing jobs:residents ratio:** this scenario assumes that 980 Great West Road will accommodate 906 jobs; and
- **Future homes:jobs ratio:** this scenario assumes that 980 Great West Road will accommodate 1,148 jobs.

7.23

The mix of uses determines the requirement for overall floorspaces, based on the different employment densities of different floorspace use types. Derived from the previous discussion on suitable sectors, **Table 7.2** shows:

- **ELR implied split:** the employment forecasts are transposed within the 2024 ELR Update to space requirements. These space types include office, workshop, industrial, and warehousing needs, whereas other (which includes retail, education, health etc.) needs are excluded. To make a proportionate contribution to an equivalent mix of uses, this split is applied to the potential jobs targets for 980 Great West Road to derive a range of potential core employment space floorspace types and quantums.
- **Local specialisms:** the location of the development in the Hounslow CEZ, underpinning policy context, and identified suitable sectors for the Great West Corridor indicates an optimal location for creative industries, high-tech/advanced manufacturing, low carbon, and business services firms. A cluster of locally specialised firms would require a range of office, workshop, and light industrial space, which would be considered to come forward proportionally to each other, per the 2024 ELR Update.
- **Creative cluster:** extending the above focus on the presence of the creative industries in the Hounslow CEZ, a further scenario is developed to reflect the mixture of use type needs across office, workshop and light industrial spaces when applying an indicative split.
- **Life sciences cluster:** the location of the development in the WestTech corridor and aspirations of nearby higher education institutions, such as the University of West London (UWL) indicates an optimal location for life sciences activities. This would require a range of office, lab and light industrial space, which would be considered to come forward proportionally to each other, per their nearest equivalent use in the 2024 ELR Update. Life sciences activities (comprising the blended use of lab and office space for example) mean the application of benchmark employment densities are ineffective at estimating the amount of associated employment. A blended employment density is therefore applied to capture the way life sciences space is used, based on research into operational clusters in Cambridge.

7.24

The employment scenarios set out in **paragraph 7.22** and sectoral disaggregation scenarios set out in **paragraph 7.23** are combined with employment floorspace density assumptions to provide estimations of total employment space need set out in **Table 7.2**. There are four scenarios utilised:

- **High density:** a high estimate of employment density utilising benchmarks presented in the HCA Employment Density Guide.
- **Medium density:** a medium estimate of employment density utilising benchmarks presented in the HCA Employment Density Guide.
- **Low density:** a low estimate of employment density utilising benchmarks presented in the HCA Employment Density Guide.

⁸⁸ Arup/Knight Frank, 2023. Future of Office Use.

⁸⁹ Office for National Statistics, 2024. Business Register and Employment Survey 2023.

- **High hybrid working efficiency:** adjustments are made to the above estimations on the basis that companies maximise the efficiency of their office space through practices such as hot-desking, facilitated by the increased levels of hybrid working set out in **Section 4**. It is assumed in this scenario that all office-workers on average attend the office 2.8 days a week (derived from **Figure 4.2**).

7.25 The analysis shows that under a range of different assumptions regarding employment generation and employment floorspace density, the delivery of 26,509m² GIA (see **paragraph 2.8**) of employment floorspace is an appropriate quantum. In the majority of scenarios presented in **Table 7.2**, the implied employment floorspace need for 980 Great West Road is below 26,509m² GIA.

7.26 In 83% of scenarios within the “Existing jobs:residents ratio” scenario, the implied employment floorspace need is below 26,509m². This shows that it is more likely than not that the proposed development at 980 Great West Road would be effective in “washing its own face” in the sense that it would provide the appropriate quantum of employment floorspace to resolve the impact of the increased demand for jobs driven by the increase in population. If the core employment offer focused on uses aligned with ‘Local specialisms’, then the proposed development would fully mitigate the impact of increasing demand for jobs in all scenarios.

7.27 In the “Future homes:jobs ratio” – “Local specialisms” – scenario, the implied employment floorspace need is below 26,509m² in all scenarios. This demonstrates that the current masterplan for 980 Great West Road is well placed to deliver employment space to suit local economic need, in a manner which contributes to LBH’s wider long-term forecast requirements around housing need and employment growth.

Table 7.2 The quantum of space needed to accommodate the jobs generated by new residents varies depending on the mix of uses

Quantum of employment floorspace need arising from the new population, by development typology and approach to jobs target (sqm)

	More residents, more jobs (331 jobs)	Existing jobs:residents ratio (906 jobs)	Future homes:jobs ratio (1,148 jobs)
ELR implied split			
<i>High density</i>	7,000	19,200	24,300
<i>Moderate density</i>	8,500	23,200	29,400
<i>Low density</i>	10,700	29,400	37,200
<i>High hybrid working efficiency</i>	6,300 – 9,600	17,300 – 26,300	21,700 – 33,000
Local specialisms			
<i>High density</i>	5,000	13,700	17,400
<i>Moderate density</i>	6,000	16,500	20,900
<i>Low density</i>	7,300	20,100	25,400
<i>High hybrid working efficiency</i>	4,100 – 5,900	11,300 – 16,100	14,000 – 19,900
Creative cluster			
<i>High density</i>	8,400	23,000	29,200

	More residents, more jobs (331 jobs)	Existing jobs:residents ratio (906 jobs)	Future homes:jobs ratio (1,148 jobs)
<i>Moderate density</i>	9,900	27,100	34,300
<i>Low density</i>	11,500	31,500	39,900
<i>High hybrid working efficiency</i>	8,000 – 10,900	22,000 – 29,800	27,700 – 37,500
Life sciences cluster			
<i>High density</i>	6,500	17,800	22,500
<i>Moderate density</i>	7,200	19,800	25,100
<i>Low density</i>	8,000	21,900	27,700
<i>High hybrid working efficiency</i>	3,900 – 4,800	10,700 – 13,100	12,600 – 15,500

Source: Volterra analysis.

Alternative ways to bring forward employment on site

7.28

Employment in sectors which fall outside of the scope of traditional employment needs assessments has a less straightforward relationship with space requirements, which makes it difficult to quantitatively determine what an appropriate amount of space would satisfy requirements, as these can be highly variable. However, the economic benefits of bringing forward other uses for boosting local employment, supporting clustering and agglomeration effects, and attracting and retaining a skilled workforce are significant.

7.29

The University of West London (UWL) has its main campus in Ealing, as well as satellite campuses at Brentford, Reading and Oxford, and is renowned for its career-focused approach, strong industry links, and high graduate employment rates. An option currently being explored for the proposals is to bring forward a medical campus to be occupied by UWL within the commercial floorspace. This would comprise the university's new School of Medicine and Biosciences and have multiple benefits which align with the objective of supporting employment growth in LBH:

- **Job creation in high growth sectors:** clinical and research roles would be created within one of the key growth sectors within the UK economy.
- **Skills development and training opportunities:** the provision of a medical campus would improve access to education opportunities which in turn could improve opportunities for accessing emerging opportunities in healthcare and related fields.
- **Encouraging and building on clustering effects:** locating a medical campus within West London would help strengthen emerging health, life sciences, and tech clusters already present in the 'WestTech' corridor. The campus could act as an anchor institution and attract complementary businesses.
- **Further catalysis of regeneration in the Great West Corridor:** a medical campus would support the ongoing regeneration of the Great West Corridor by activating underused land and enhancing the area's profile as a strategic growth location. This aligns with applicable policy aspirations for the area.

7.30

The opportunities presented by this potential use of commercial space would need to be assessed by planning decision-makers should an application come forward.

7.31 Alternatively, *sui generis* uses such as car showrooms could be particularly suitable to the Great West Corridor context where an existing highly visible cluster is established, and such uses are promoted for reinforcement in emerging policy.⁹⁰ Policy is supportive of innovatively designed flagship stores, which could catalyse and support employment across a range of related sectors including the repair of motor vehicles.⁹¹

Contribution to LBH policy and targets

7.32 The above analysis demonstrates that the working numbers regarding the quantum of proposed commercial floorspace at 980 Great West Road aligns with what would be expected to be provided at a mixed-use development.

7.33 It is appropriate to consider how this delivery compares against the floorspace targets set out in LBH's ELR. Conservatively assuming the 26,509m² GIA of core employment floorspace disaggregates into floorspace uses in line with the "Local specialisms" scenario, results in the below contributions to LBH's floorspace targets (**Table 7.3**).

7.34 Under these assumptions, the office space delivered by the redevelopment of 980 Great West Road would contribute to 16% of the floorspace targets between 2020 to 2041 as set out in the ELR, or 340% of the annual target.

7.35 This is considered a significant contribution for a site whose current employment floorspace is not viable and is not assigned any minimum commercial development quantum in its draft site allocation presented in the LBH's Local Plan review.

Table 7.3 The proposed employment floorspace at 980 Great West Road would contribute significantly to LBH's annual commercial floorspace targets

The contribution of 980 Great West Road to LBH's commercial floorspace targets (assuming "Local specialisms" floorspace split)

	Office	Workshop	Light industrial
ELR 2019-2043 target (m ²)	122,800	81,800	463,800
ELR annual target (m ²)	5,800	3,900	22,100
Assumed 980 Great West Road provision (m ²)	19,900	3,300	3,300
% of ELR 2019-2043 target	16%	4%	1%
% of ELR annual target	340%	85%	15%

Note: figures may not sum due to rounding.

Case study benchmarks

7.36 A number of case studies of other mixed-use developments are presented below for observation of the levels of employment floorspace provided.

7.37 In other locations across London, mixed use redevelopment has brought forward activated neighbourhoods which provide employment opportunities within commercial spaces alongside residential units. The London

⁹⁰ LB Hounslow, 2024. Hounslow Local Plan 2020 – 2041. Proposed Submission Version (Regulation 19).

⁹¹ LB Hounslow, 2020. Local Plan Review: Volume 4 Submission Great West Corridor.

City Island project, Meridian Water, and Greenwich Design District exemplify how this can be successfully delivered, and thought about in masterplan visioning. These case studies provide both benchmarks and sense checks for the assessment of the appropriate potential amount of employment space for 980 Great West Road.

London City Island

A hybrid planning application for London City Island was granted in 2007. The Masterplan set out a vision for Leamouth Peninsula to act as a gateway development for this part of East London. Between 2013 – 2020 a number of S73 / S96a applications were submitted and approved to refine and develop the masterplan.

The London City Island redevelopment transformed a 4.85 hectare brownfield site on the Leamouth Peninsula in the London Borough of Tower Hamlets (LBTH). Across a number of buildings, around 1,700 residential units were delivered, which were complemented with 6,000m² of commercial floorspace and 13,000m² of retail, leisure and community space. The site has offices, galleries, theatres, cinema, and studios. The neighbourhood hosts the English National Ballet in the Mulryan Centre for Dance, and the London Film School within purpose-built education space.

Around 11m² of commercial space was delivered per residential unit. Applying this ratio to the number of residential units that could be delivered through the regeneration of 980 Great West Road, would indicate that an appropriate quantum of floorspace could be 21,000m² (of which **7,000m² would be commercial**, and 14,000m² would be comprised of retail, leisure and community uses).

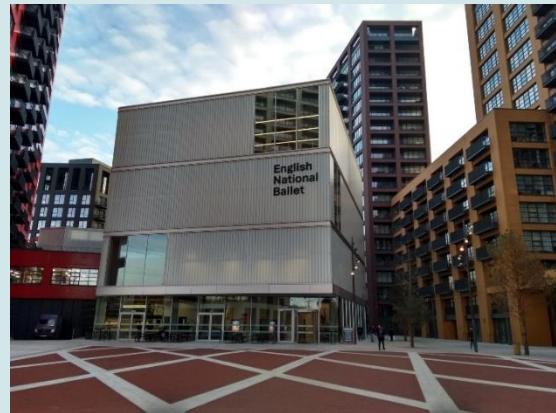


Image source: John Slater.

Meridian Water

Meridian Water in the London Borough of Enfield (LBE) is one of London's largest regeneration schemes, which will deliver 10,000 homes and 6,000 jobs across its masterplan. This includes the delivery of a new employment hub and two skills academies to promote high-quality jobs for local people⁹². During the construction of the scheme, meanwhile uses will also be promoted to support local enterprises.

The jobs target for the mixed use regeneration equates to approximately 0.6 jobs per residential properties. Applying this ratio to the number of residential units that could be brought forward at 980 Great West Road indicates that around **1,110 jobs** could be a possible target to be supported.



Image source: Sludge G.

Greenwich Design District

The Greenwich Design District was delivered in 2021, comprising 16 bespoke buildings designed by eight different 'pioneering' architects and provides purpose-built workspace specifically targeted at creative industry tenants. The workspaces include co-working, offices, event spaces, studios, galleries and exhibition spaces. The Design District hosted more than 170 businesses in 2023, and supported a network of 675 employees and 250 freelancers, across 14,000m² of floorspace.⁹³



The GLA worked with the developer Knight Dragon to bring forward this development.

Image source: Matt Brown.

Ruby Triangle

Ruby Triangle, a joint venture between Avanton and A2 Dominion (housing association), is a mixed-use development on the Old Kent Road. It will deliver 1,165 homes and 7,634m² of commercial floorspace. Applying this ratio of homes to commercial floorspace to 980 Great West Road would imply a commercial floorspace provision of **12,100m²**.

⁹² LB Enfield, 2024. Meridian Water. Retrieved from: <https://www.meridianwater.co.uk/>

⁹³ Social Life, 2023. Understanding the impact of London's Design District two years on.

8.

Appendix A – Assumptions

8.1

The assessment of appropriate types and quantum of employment space at 980 Great West Road utilised a number of assumptions within each of the scenarios, which are presented here.

ELR implied split

Uses	Split of jobs	Proportion of employment which is part-time (%)	Employment density source (sqm [GIA] per FTE)			Employment density source
			High	Moderate	Low	
Office	57%	9%	9.4	11.8	15.3	HCA Employment Densities Guide High = Call centres Moderate = Finance and insurance Low = Corporate
Workshop	19%	9%	23.5	35.3	47.1	HCA Employment Densities Guide Studio
Industrial	4%	38%	36.0	36.0	36.0	HCA Employment Densities Guide Industrial and manufacturing
Warehousing	19%	38%	66.5	73.2	90.3	HCA Employment Densities Guide High = 'Final mile' distribution centre Moderate = Regional

Uses	Split of jobs	Proportion of employment which is part-time (%)	Employment density source (sqm [GIA] per FTE)			Employment density source
			High	Moderate	Low	
						Low = National distribution centre

8.2

The split of jobs relates to that of employment forecasts within the 2024 ELR Update.

Local specialisms

Uses	Split of jobs	Proportion of employment which is part-time (%)	Employment density source (sqm [GIA] per FTE)			Employment density source
			High	Moderate	Low	
Office	71%	9%	9.4	11.8	15.3	HCA Employment Densities Guide High = Call centres Moderate = Finance and insurance Low = Corporate
Workshop	14%	9%	23.5	35.3	47.1	HCA Employment Densities Guide Studio
Light industrial	14%	38%	55.3	55.3	55.3	HCA Employment Densities Guide Industrial and manufacturing

8.3 The split of jobs is apportioned to the ratio between office : workshop and industrial when the remaining uses from the split of employment forecasts (warehousing and other) in the 2024 ELR Update are discounted. The amount of workshop and industrial floorspace expected to come forward at studio (half) and light industrial (half) employment densities is also accounted for.

Creative cluster

Uses	Split of jobs	Proportion of employment which is part-time (%)	Employment density source (sqm [GIA] per FTE)			Employment density source
			High	Moderate	Low	
Office	33%	9%	9.4	11.8	15.3	HCA Employment Densities Guide High = Call centres Moderate = Finance and insurance Low = Corporate
Workshop	33%	9%	23.5	35.3	47.1	HCA Employment Densities Guide Studio
Light industrial	33%	38%	55.3	55.3	55.3	HCA Employment Densities Guide Industrial and manufacturing

Life sciences cluster

Uses	Split of jobs	Proportion of employment which is part-time (%)	Employment density source (sqm [GIA] per FTE)			Employment density source
			High	Moderate	Low	
Blended life science space	100%	9%	20.6	22.9	25.3	<p>A range based on Volterra research on the blended employment density of:</p> <p>Babraham Research Campus: 17.5⁹⁴</p> <p>Cambridge Science Park: 18.0⁹⁵</p> <p>Greater Cambridge Employment and Housing Evidence Update: 21.5⁹⁶.</p> <p>The 'high hybrid working efficiency' figure reflects the upper range of the HCA Employment Densities Guide figure for 'office'.</p>

⁹⁴ Bidwells, 2023. Grafton Centre Economic Impact Assessment.

⁹⁵ Bidwells, 2023. Grafton Centre Economic Impact Assessment.

⁹⁶ Greater Cambridge Shared Planning Service, 2023.



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