

BERMONDSEY DIVE UNDER

DRAFT

22/10/20

Note: Stated areas and figures are approximate. They relate to the likely areas of the project at the current state of design. Any decisions to be made on the basis of these predictions, whether as project viability, pre-letting, lease agreements or the like, should include the due allowance for the increases and decreases inherent in the design development and the building process.

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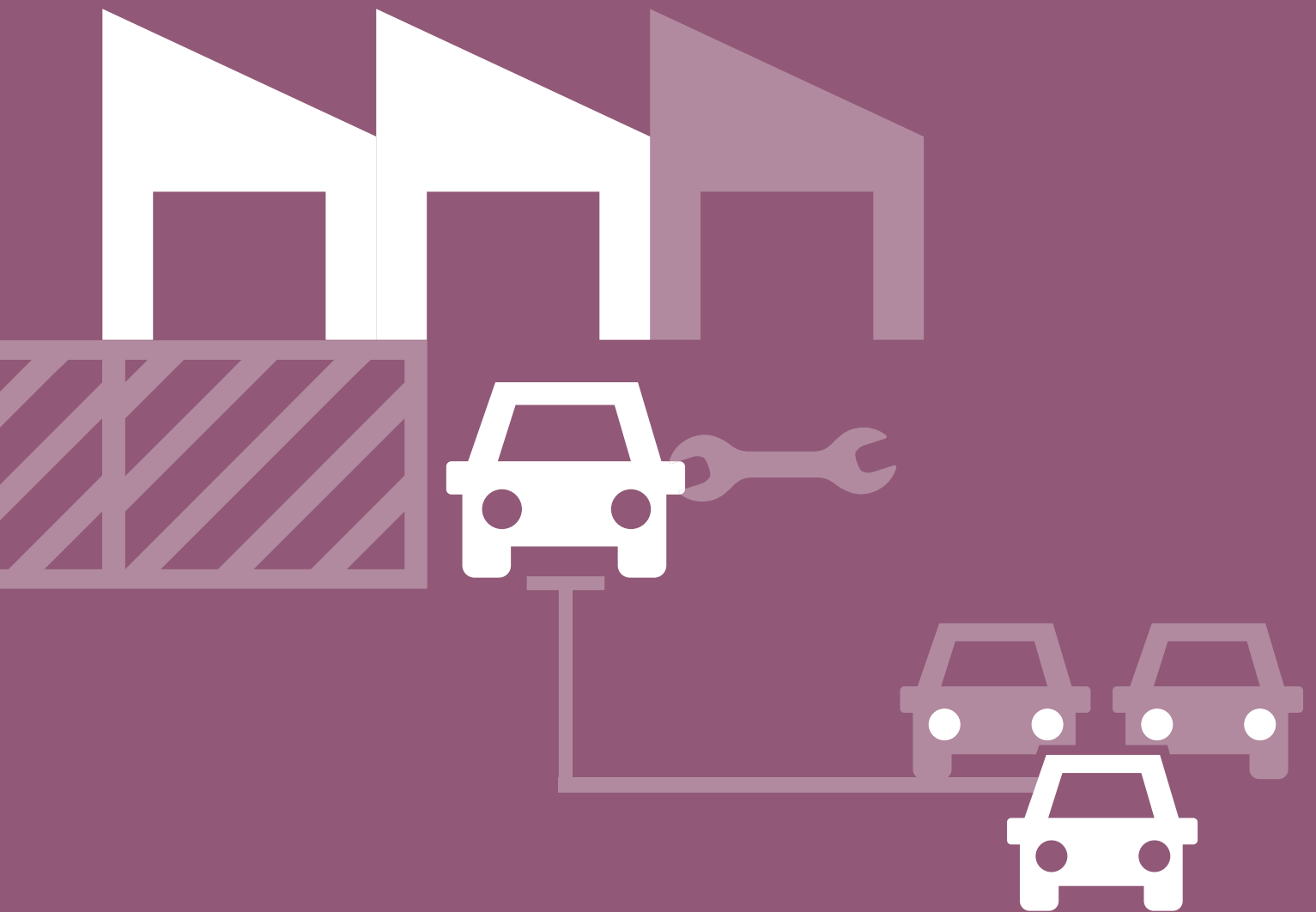
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CONTENT

EXISTING CONDITION	1
THE PROCESS	5
SITE 1 + 2	15
SITE 1 + 2 + 3 OPTION A	27
SITE 1 + 2 + 3 OPTION B	39
SITE 1 + 4	61



EXISTING CONDITION



Indicative Areas

Site 1: **0.43 ha**

Site 2: **0.49 ha**

Site 3 - Bermondsey TE East: **1.61 ha**

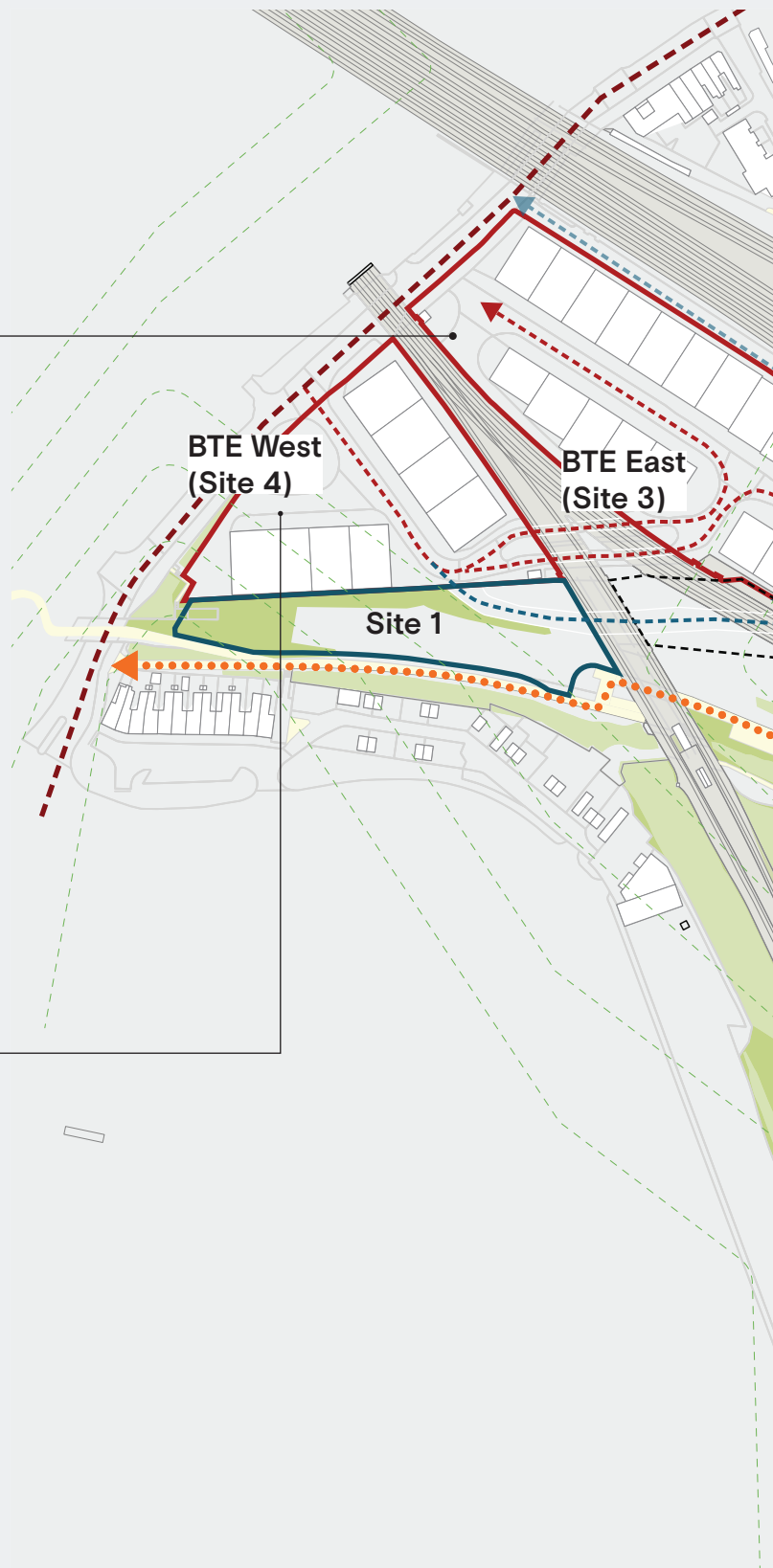
Site 4 - Bermondsey TE West: **0.80 ha**

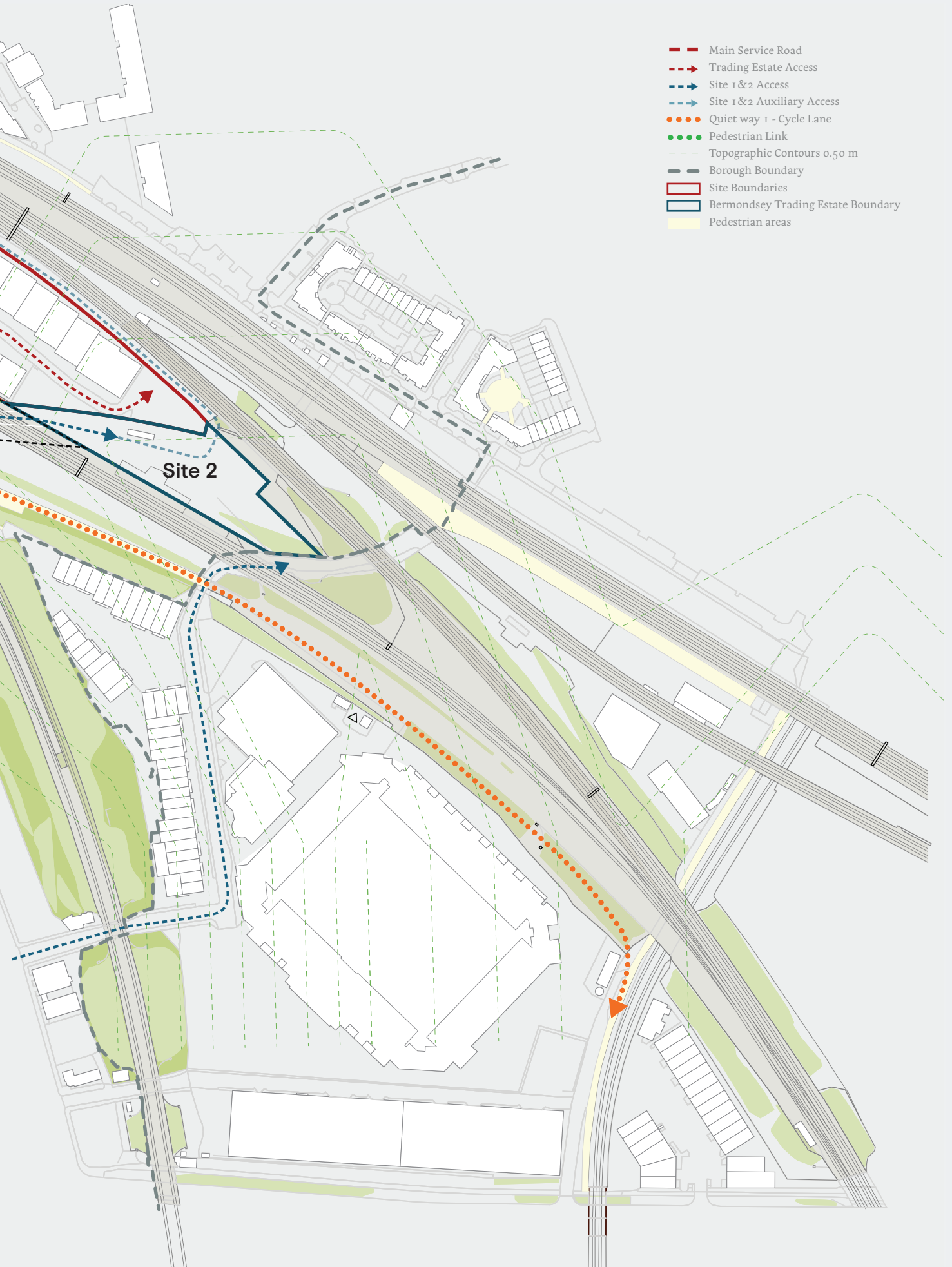
**Bermondsey Trading
Estate East**

Business Name	GF Floorspace	Total floorspace
Affinity Brew Co	1106	1106
Amey	333	433
Benugo	375	487
Moving venue catering	738	959
Smart Hospitality	374	486
Southside Waterjet Ltd.	350	455
Terminal Studios	363	471
Direct Seafoods London	343	343
Fourpure Brewing 2	782	782
Vacant	364	364
Bermondsey ambulance station	288	374
CMS Distribution	1096	1424
CSM Logistics	357	464
Jigsaw Colour Ltd.	284	369
Total	7151	8518
Plot Coverage		44%
Plot Ratio		53%

**Bermondsey Trading
Estate West**

Business Name	GF Floorspace	Total floorspace
Bew electrical distributors	745	969
City electrical factors	374	487
Vacant	365	365
Vacant	27	27
Howdens Joinery 1	905	1177
Screwfix	440	572
Tool Station 2	446	580
Total	3303	4177
Plot Coverage		41%
Plot Ratio		52%



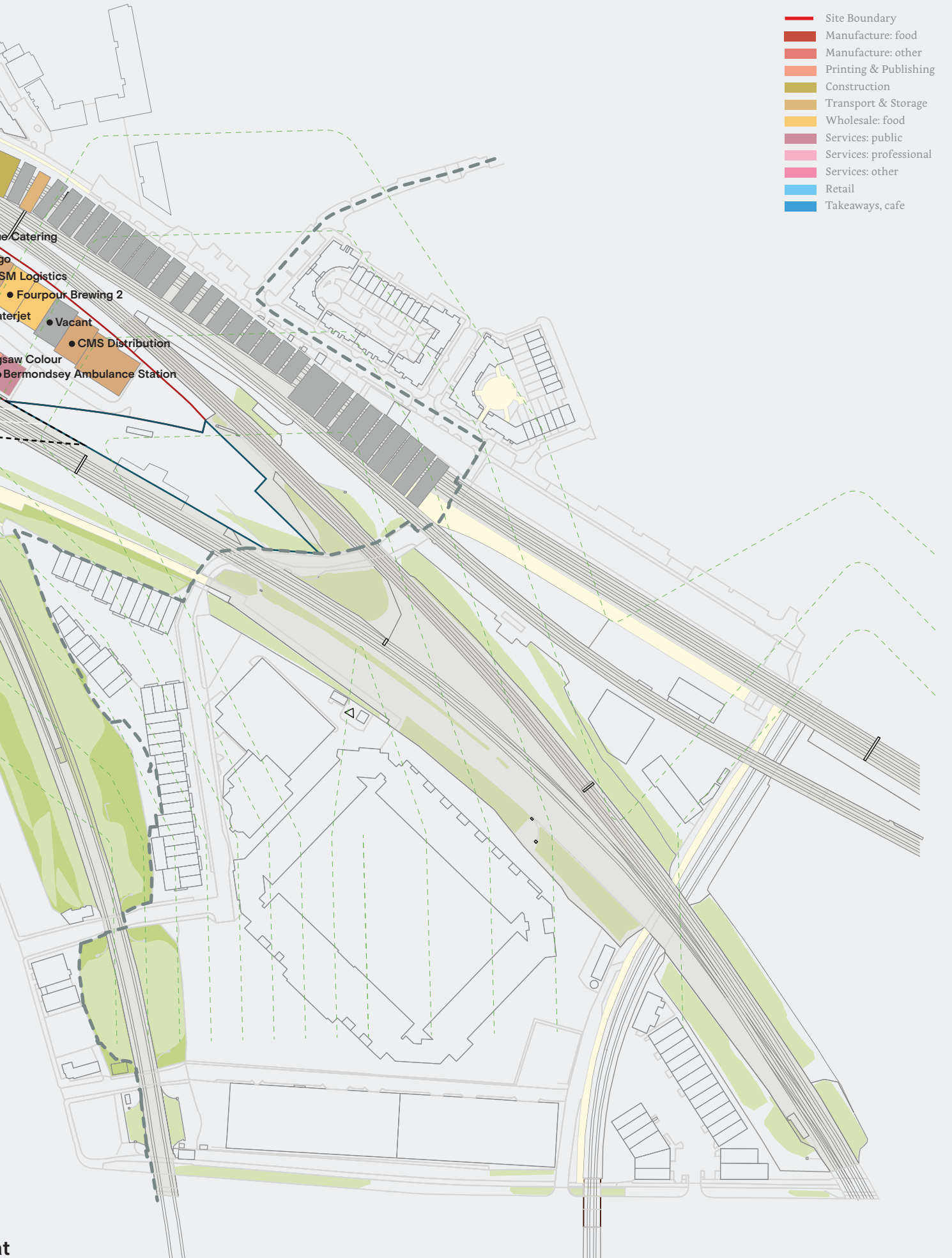


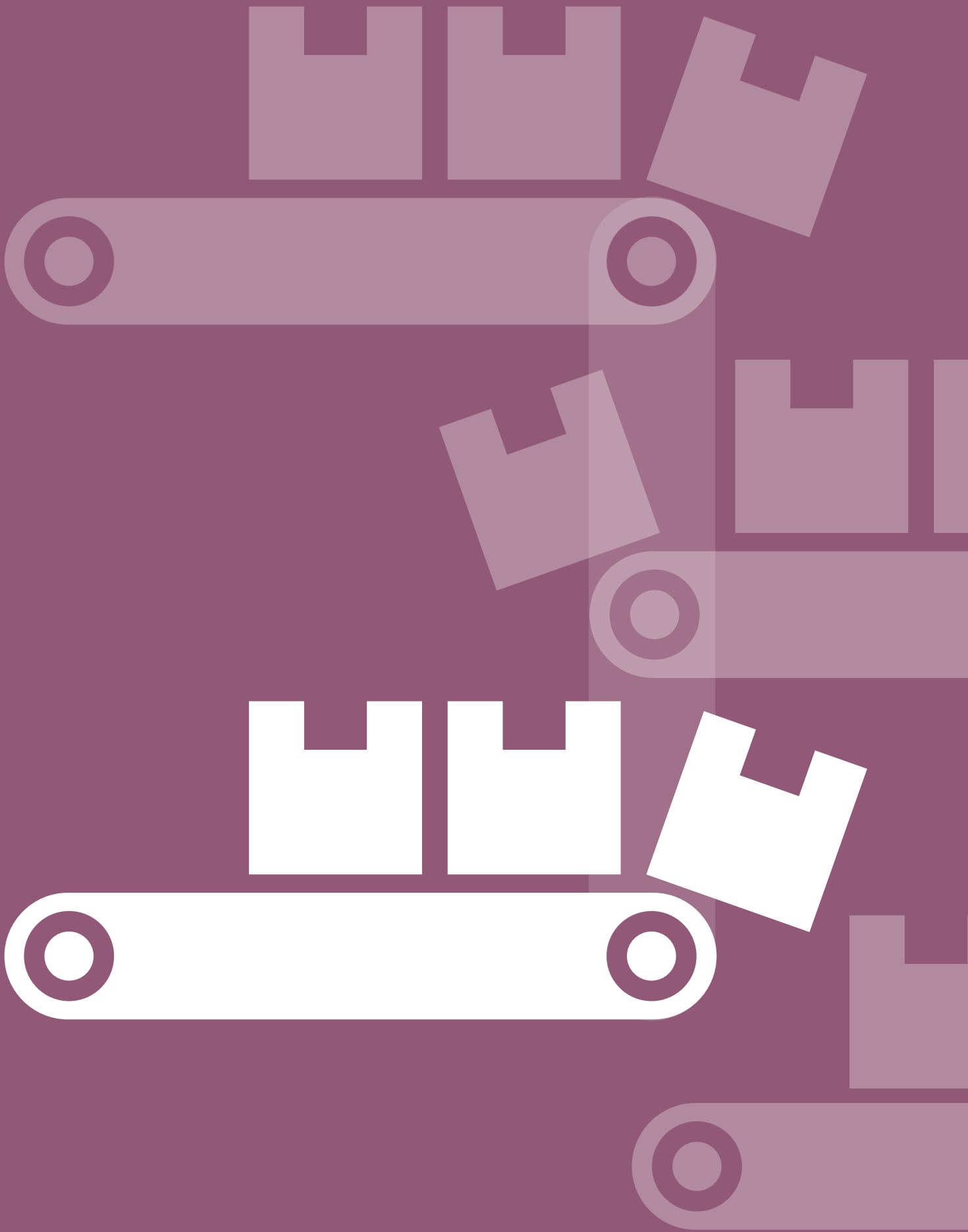
EXISTING BUSINESSES



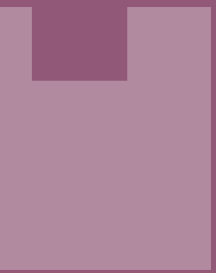
Ground floor plan.

Source: South Bermondsey Report/ We Made That





THE PROCESS



OBJECTIVES

The intensification of the Bermondsey Dive under is significant to the local economy by supporting and encouraging a wide range of skills and job types including the wide variety of businesses that serve central London and new and growing sectors such as the arts and creative industries.

According to the larger Old Kent Road masterplan, the development of the area will be largely car free, whilst promoting walking and cycling, electric buses, taxis and commercial vehicles in order to tackle air and noise pollution. This will extend to vital delivery options to and from the site.

The general objectives of the intensification proposals are:

- Retain and increase the amount of employment floor space
- Accommodate existing businesses on site or provide relocation options for businesses that will be displaced by development
- Ensure that employment floor space is suitable to meet current demand and intended occupiers

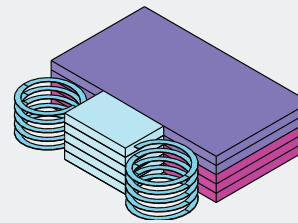
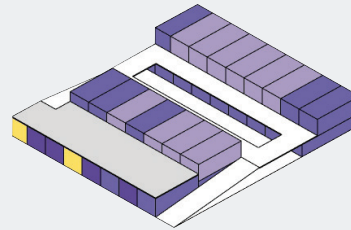
INDUSTRIAL INTENSIFICATION TYPOLOGIES

With the increase in land value, industry is transforming and adapting to create more compact and optimal spaces. There is a growing swell of enthusiasm within the landlord and developer arena to promote higher density schemes. These industrial space transformations are based on a series of design principles such as flexibility, stacking, and sharing facilities to intensive use of space.

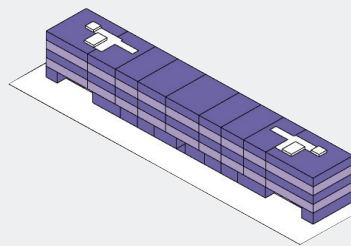
Several built examples around the world provide a different way to intensify industrial and employment uses. These can be a grouped in the following categories:

- Multi-storey : operational yard in other levels, ramped access for vehicles to higher levels
- Multi-level: Mix of ground dependent uses with stackable uses, all goods transported via good lifts
- Co-location: Mix of industrial with offices, retail, and housing

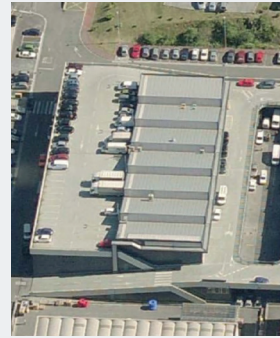
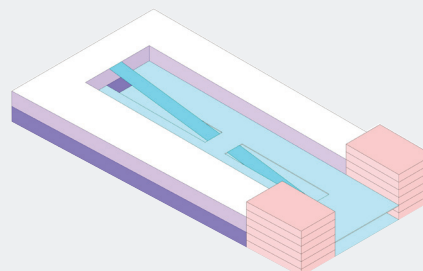
Multi-storey (Ramp)



Multi-level (Lift)



Co-location



Berlartza
Inaki Begiristain Arkitektura
Donostia-San Sebastian, S



Prologis Park Zama
Fujita Corporation
Kanagawa, Japan



Gewerbehof Laim
Bogevischs buero architekto
Munich, Germany



Binck Twins Business
The Hague, The Netherlands



la Bulegoa
pain



Park du Crevecoeur
Paris, France



Paris Air2 Logistic Centre
Paris, France



Hotel Industriel Patin
Paul Chemetov architect
Paris, France



1

Proposed Multi-Level projects (London)



en



Flatted factory
Singapore



The Generator
Michael Sparks
London, UK
PC expect 2021



Bow Yard - Urban Shed
Prologis
London, UK
PC Summer 2020



s Centre
s



Kaap Noord
Amsterdam, The Netherlands

INDUSTRIAL SPATIAL DEMAND

The JLL report considers a multi-level scheme for employment use is the most appropriate for the site. They anticipate that each of the properties would accommodate warehouse-type operators on the ground floor level with various uses on the upper floors accessed by a number of cargo lifts.

The multi-level schemes will generate good demand from a multitude of operators and an endless supply of SMEs across a wide spectrum of uses.

JLL consider that many businesses would consider this space for:

- Provision of cost-effective space for small businesses to locate in an inner London location
- Creation of a ready-made business community within which businesses can leverage off each other
- Promotion of a business within a high profile and statement building
- Allow a business to grow within the scheme, by offering flexibility of lease tenure such that occupiers can expand within the building or move elsewhere within the area.
- Good accessing 24/7 hour

JLL has undertaken some research into the current requirements in the immediate markets conceivably consider such space; they anticipate that the following uses will be suitable at Bermondsey Dive-Under.

- Events Production Space – 3-7,500 sq ft
- Photography Studio – 2-4,000 sq ft
- Florist warehousing – 1,500-3,000 sq ft
- Kitchen Space Provider – 5,000-10,000 sq ft
- Home décor design and production 3-7,000 sq ft
- Fruit smoothie producer 2-4,000 sq ft
- Digital signage 3-7,000 sq ft
- Events production 6-8,000 sq ft
- Creative card production 5-10,000 sq ft
- Film production 1-5,000 sq ft
- Artists studio 5-10,000 sq ft
- Photography studio 6-10,000 sq ft
- Recording studio – 3-10,000 sq ft



Multi-level Industrial Building, Munich, Germany

UNITS BASELINE

Based on the JLL’s feasibility study, we have created an industrial unit baseline, with the different spatial requirements.

The requirements include unit size, height, type of vehicle access, daylight, front office requirements, ability to be stacked or dependency on the ground floor, the potential for clustered servicing, and the type of operational yard needed.










After setting the requirement matrix, we identified the units that share the same spatial and technical requirements. Then, we created a set of units flexible to host different uses depending on the market’s needs. The units are categorized as small, medium, large, and extra-large. These units are the basic components to build the industrial intensification typologies and ensure that the proposed floorspace meets the current demand and intended occupiers.

- XS
- S
- M
- L
- XL
- Daylighting Requirement
- Loading bay Requirement
- Assembly Yard Requirement
- Operational Yard Requirement

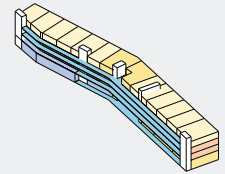
	JLL Uses	Use Class	JLL Unit Size range sqm	Size (XS, S, M, L, XL)
Storage & Services	Prop Hire	B8	500	M
	Prop Hire	B8	1,000	L
	Film Companies	B1c	90	XS
	Film Companies	B1c	200	S
	Film Companies	B1c	460	M
	Event Production	B2	280-700	M
	Event Production	B2	560-740	L
	Recording Studio	B1c	280	S
	Recording Studio	B1c	500	M
	Fine Art Storage	B8	200	S
	Recording Studio	B1c	930	L
Printing & Publishing	Digital Printing	B1c	280	S
	Digital Printing	B1c	650	M
	Photography Studio	B1c	190	S
	Photography Studio	B1c	370-560	M
	Photography Studio	B1c	930	L
	Media/ Publishing	B1c	200	S
	Media/ Publishing	B1c	500	M
Creative Industries & Manufacturing	Textiles	B1c	150	XS
	Textiles	B1c	300	S
	Florist Warehousing	B1c	140	XS
	Florist Warehousing	B1c	280	S
	Creative Card Production	B1c	470	M
	Creative Card Production	B2	930	L
	Arts & Crafts (Studios)	B1c	470	M
	Arts & Crafts (Studios)	B2	930	L
	Home Décor Production	B1c	280	S
	Home Décor Production	B2	650	M
	Light Assembly	B1c	100	XS
Light Assembly	B1c	200	S	
Food Manufacturing	Dark Kitchens	B1c	190	S
	Dark Kitchens	B2	370	M
	High End Food Companies	B2	470	M
	High End Food Companies	B2	930	L
Logistics	E-Commerce	B8		XL
	Last Mile Logistics	B8	4,000-8,000	XL
Others	R&D	B1b	100	XS
	R&D	B1b	200	S
	R&D	B1b	500	M

Floor-to-ceiling height	HGV or LCV Access	Operational Daylighting Requirement	ELS Front Office Requirement	Stacked	Operational Yard/ Loading Bay	Assembly Yard Requirement	Potential for Clustering Servicing	Business examples
4m	LCV	None	Yes	Yes	Loading Bay	Yes	Yes	Props/ backgrounds for product shoots
4m	LCV	None	Yes	Yes	Loading Bay	Yes	Yes	Props/ backgrounds for product shoots
4m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Video production service
4m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Video production service
4m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Video production service
4-6m	LCV	None	Yes	Yes	Loading Bay	Yes	Yes	Event planning & technical production
4-6m	LCV	None	Yes	Yes	Loading Bay	Yes	Yes	Event planning & technical production
4-6m	LCV	None	Yes	Yes	N/A	No	Yes	high end Music recording studio's
4-6m	LCV	None	Yes	Yes	N/A	No	Yes	high end Music recording studio's
4-8m	LCV	None	No	No	Loading Bay	No	No	Art Storage Facility
4-6m	LCV	None	Yes	Yes	N/A	No	Yes	high end Music recording studio's
4-6m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Digital Printing Service
4-6m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Digital Printing Service
4-6m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Photography studio rental
4-6m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Photography studio rental
4-6m	LCV	None	Yes	Yes	Loading Bay	No	Yes	Photography studio rental
4-6m	LCV	Yes	Yes	Yes	N/A	No	Yes	Digital Media Publisher
4-6m	LCV	Yes	Yes	Yes	N/A	No	Yes	Digital Media Publisher
4-6m	LCV	Yes		Yes	Loading Bay	No	Yes	Clothes and fabric manufacturer
4-6m	LCV	Yes		Yes	Loading Bay	No	Yes	Clothes and fabric manufacturer
4-6m	LCV	Yes	No	Yes	Loading Bay	Yes	Yes	Plant Warehouse
4-6m	LCV	Yes	No	Yes	Loading Bay	Yes	Yes	Plant Warehouse
4m	LCV	Yes	No	Yes	Loading Bay	No	Yes	Printing and Publishing
4m	LCV	Yes	No	Yes	Loading Bay	No	Yes	Printing and Publishing
4-6m	LCV	Yes	Yes	Yes	Loading Bay	Yes	Yes	
4-6m	LCV	Yes	Yes	Yes	Loading Bay	Yes	Yes	
	LCV	Yes	No	Yes	Loading Bay	Yes	Yes	
	LCV	Yes	No	Yes	Loading Bay	Yes	Yes	
4-6m	LCV	Yes	No	Yes	Loading Bay	Yes	Yes	Carpenters
4-6m	LCV	Yes	No	Yes	Loading Bay	Yes	Yes	Carpenters
4m	LCV	None	No	Yes	Loading Bay	No	Yes	Small Kitchen rental
4m	LCV	None	No	Yes	Loading Bay	No	Yes	Small Kitchen rental
6-8m	LCV/HGV	None	No	Yes	Loading Bay	No	Yes	Artisan Sandwich supplier
6-8m	LCV/HGV	None	No	Yes	Loading Bay	No	Yes	Artisan Sandwich supplier
8-12m	HGV	None	No	No	Operational Yard	No	Yes	
4-6m	HGV	None	No	No	Operational Yard	No	Yes	Distribution Center
4m	LCV	Yes	Yes	Yes	N/A	No		
4m	LCV	Yes	Yes	Yes	N/A	No		
4m	LCV	Yes	Yes	Yes	N/A	No		

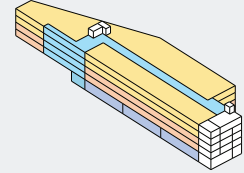
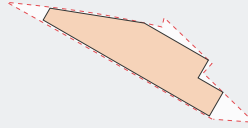
Unit	Area sqm	Basic Unit	Daylight	Loading Bay	Assembly Yard	Operational Yard	Uses	Use Class
XS 1	100						Film Companies	B1c
XS 2	100						Textiles Research & Development	B1c B1b
XS 3	100						Light Assembly Florist Warehousing	B1c
S1	200						Film Companies Recording Studio Digital Printing Photography Studio Fine Art Storage Dark Kitchens	B1c B1c B1c B1c B8 B1c
S2	200						Media/ Publishing Textiles Research & Development	B1c
S3	200						Florist Warehousing Home Décor design & Production Light Assembly	B1c
M1	500						Film Companies Recording Studio Digital Printing Photography Studio Dark Kitchens High End Food Companies	B1c B1c B1c B1c B2 B2
M2	500						Media/ Publishing Creative Card Production Research & Development	B1c B1c B1b
M3	500						Arts & Crafts (Studios) Prop Hire Event Production Home Décor Design & Production	B1c B8 B2 B2
L1	1000						Recording Studio Photography Studio High End Food Companies	B1c B1c B2
L2	1000						Creative Card Production	B2
L3	1000						Arts & Crafts (Studios) Prop Hire Event Production	B2 B8 B2
XL1	2000+						E-Commerce Last Mile Logistics	B8

-  XS
-  S
-  M
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-  Daylighting Requirement
-  Loading bay Requirement
-  Assembly Yard Requirement
-  Operational Yard Requirement

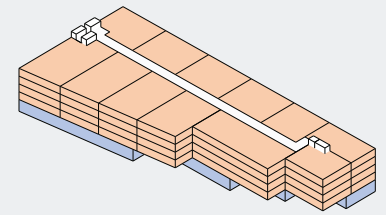
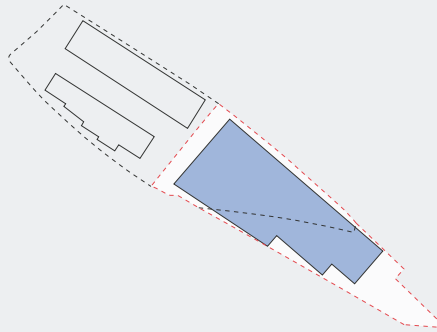
Site 1



Site 2



Site 2 + Site 3, Option A (Back)



BUILDING TYPOLOGIES

Based on the market demand and understanding of the different intensification typologies, we decided to design a series of buildings that responded to each site's limitations.

Each building can be developed independently and in phases, depending on the market. The building development can be scaled up, and the amount of accommodation in each phase scaled up or down. For this reason, it is indicated in the schedule the amount of accommodation you can achieve with different storeys.

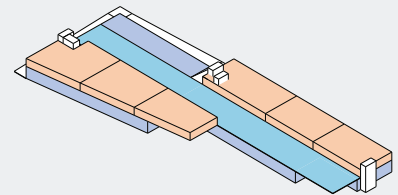
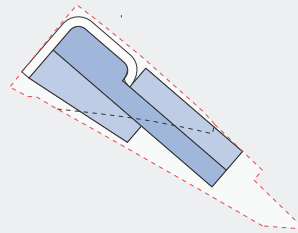
BUILDING COMBINATIONS

The building can be combined in different ways to achieve different levels of intensification. The development of two or more buildings is by phases taking into consideration the existing business.

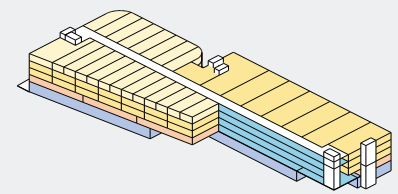
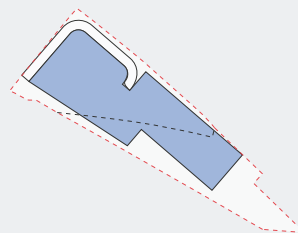
We select different scenarios to exemplified this concept and to explain the phasing of the existing business.

All combinations would required require a transport assessment at planning application stage to assess and mitigate impacts on public highways and transportation networks.

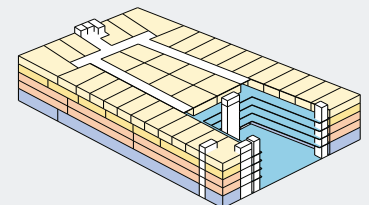
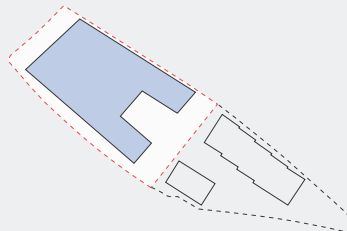
Site 2 + 3, Option b



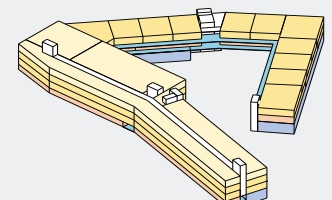
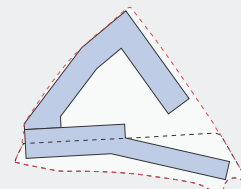
Site 2 + 3, Option b *Future growth



Site 3 (Front)



Site 1 + 4



Site			Existing Condition				Area (sqm) by Unit Type													Total				
	Area (Ha)	Proposed Floors	Footprint	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift	
1	0.43	2	0	0%	0%	0	900	0	0	1,050	0	0	1,100	0	0	0	0	1,250	0	4,300	5,900	68%	137%	137%
1	0.43	4	0	0%	0%	0	2,400	900	0	1,550	600	0	2,200	0	0	0	0	1,250	0	8,900	11,800	68%	274%	274%

Site			Existing Condition				Area (sqm) by Unit Type													Total				
	Area (Ha)	Proposed Floors	Footprint	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift	
2	0.49	3	0	0%	0%	0	0	0	0	1,650	0	0	4,200	550	0	0	0	1,250	0	7,650	9,550	41%	195%	195%
2	0.49	5	0	0%	0%	0	1,550	0	0	4,700	0	0	5,500	550	0	0	0	1,250	0	13,550	17,100	41%	349%	349%

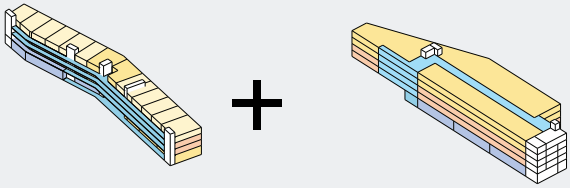
Site			Existing Condition				Area (sqm) by Unit Type													Total					
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift	
2 + 3, Option A	1.12	3	3,170	3,777	28%	34%	0	0	0	0	0	0	0	0	12,200	0	0	0	0	6,300	18,500	20,850	57%	186%	152%
2 + 3, Option A	1.12	5	3,170	3,777	28%	34%	0	0	0	0	0	0	0	0	24,400	0	0	0	0	6,300	30,700	35,250	57%	287%	253%

Site			Existing Condition				Area (sqm) by Unit Type													Total					
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift	
Site 2 + 3	1.12	2	3,170	3,777	28%	34%	0	0	0	0	0	0	0	0	3,300	0	0	0	0	5,650	8,950	9,300	52%	83%	49%

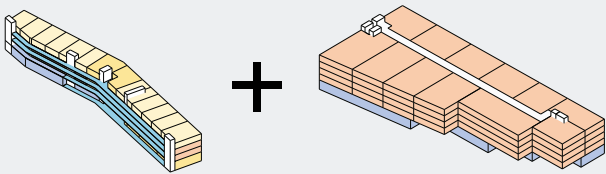
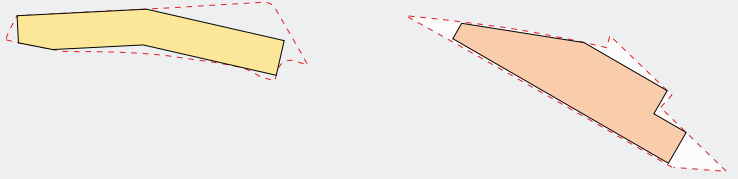
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	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift	
Site 2 + 3	1.12	5	3,170	3,777	28%	34%	0	2,900	0	0	13,250	0	0	3,300	0	0	0	0	0	5,650	25,100	31,750	52%	283%	249%

Site			Existing Condition				Area (sqm) by Unit Type													Total				
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift
Site 3 (Front)	0.97	3	3,981	4,741	41%	49%	0	0	0	0	0	0	1,850	2,050	4,200	0	1,050	3,150	0	12,300	16,250	56%	168%	119%
Site 3 (Front)	0.97	5	3,981	4,741	41%	49%	950	2,100	950	950	2,000	1,150	1,850	2,050	4,200	0	1,050	3,150	0	20,400	27,100	56%	279%	230%

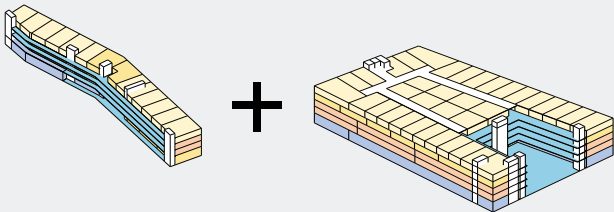
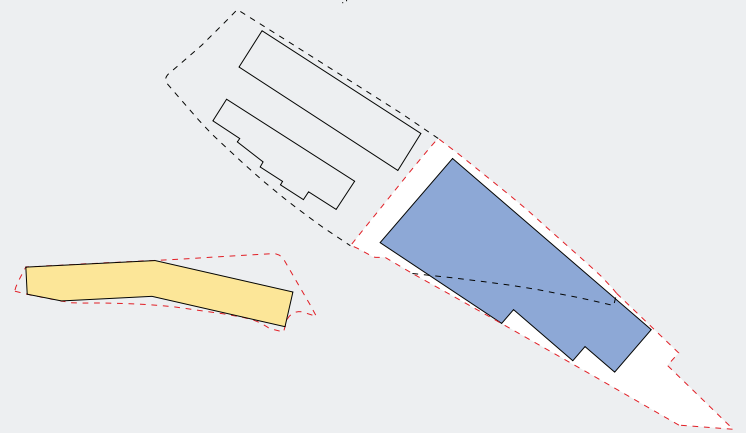
Site			Existing Condition				Area (sqm) by Unit Type													Total				
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift
Site 1 + Site 4 (partially)	0.57	2	1,512	1,848	27%	32%	0	0	0	0	550	0	0	3,450	0	0	0	1,700	0	5,700	8,000	67%	140%	108%
Site 1 + Site 4 (partially)	0.57	4	1,512	1,848	27%	32%	0	2,450	0	0	4,100	0	0	3,450	0	0	0	1,700	0	11,700	15,650	67%	275%	243%
Site 4	0.65	2	1,792	2,329	27%	36%	0	0	0	0	0	0	0	2,450	0	0	0	2,450	0	4,900	5,750	40%	88%	525%
Site 4	0.65	3	1,792	2,329	27%	36%	0	0	0	0	2,450	0	0	2,450	0	0	0	2,450	0	7,350	8,800	40%	135%	99%



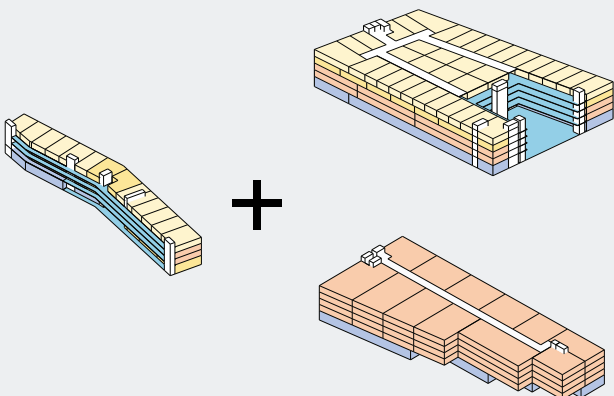
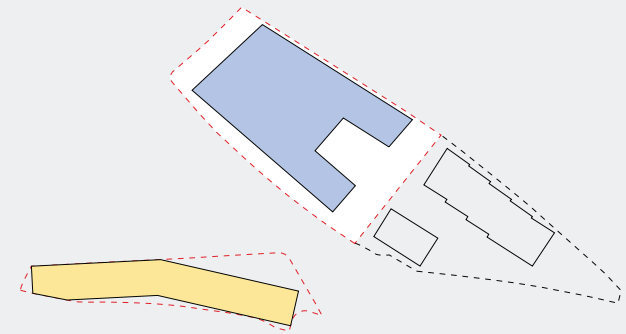
Site 1 + 2



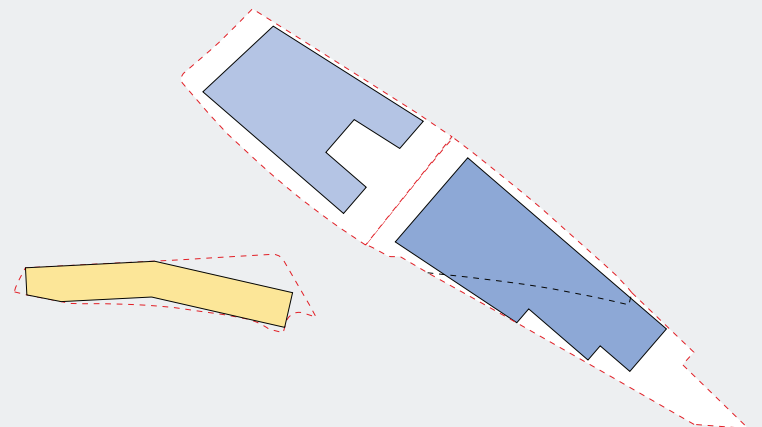
Site 1 + 3, Option a (back)

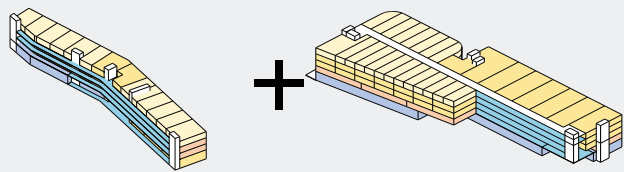


Site 1 + 3 (Front)

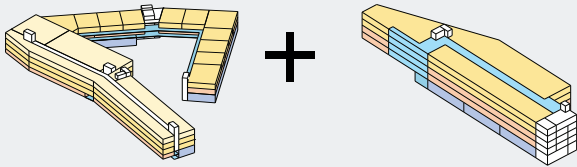
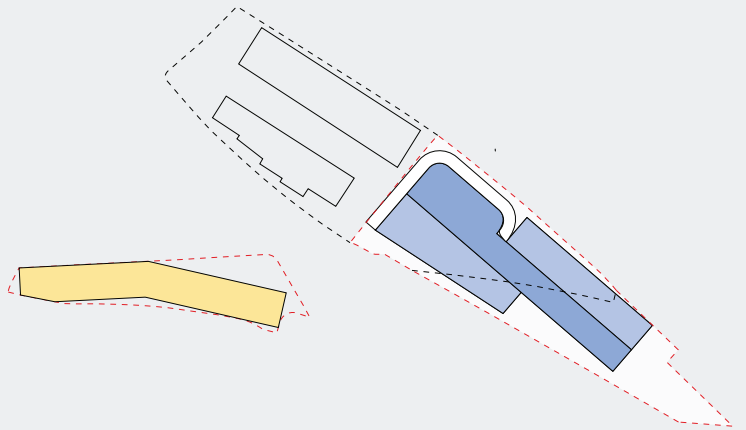


Site 1 + 3, Option a

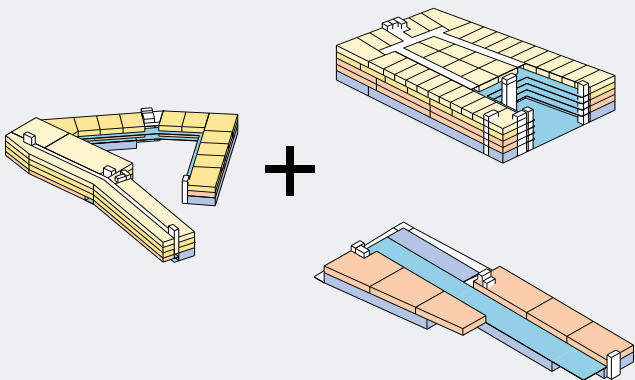
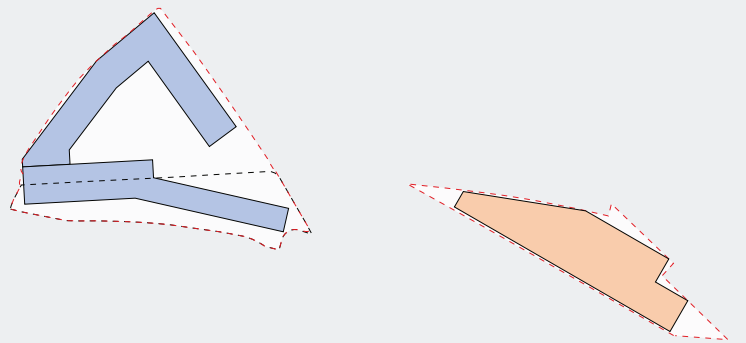




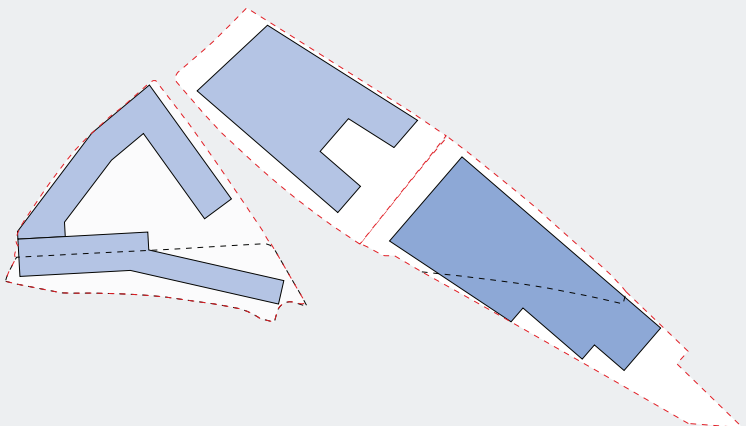
Site 1 + 3 Option b

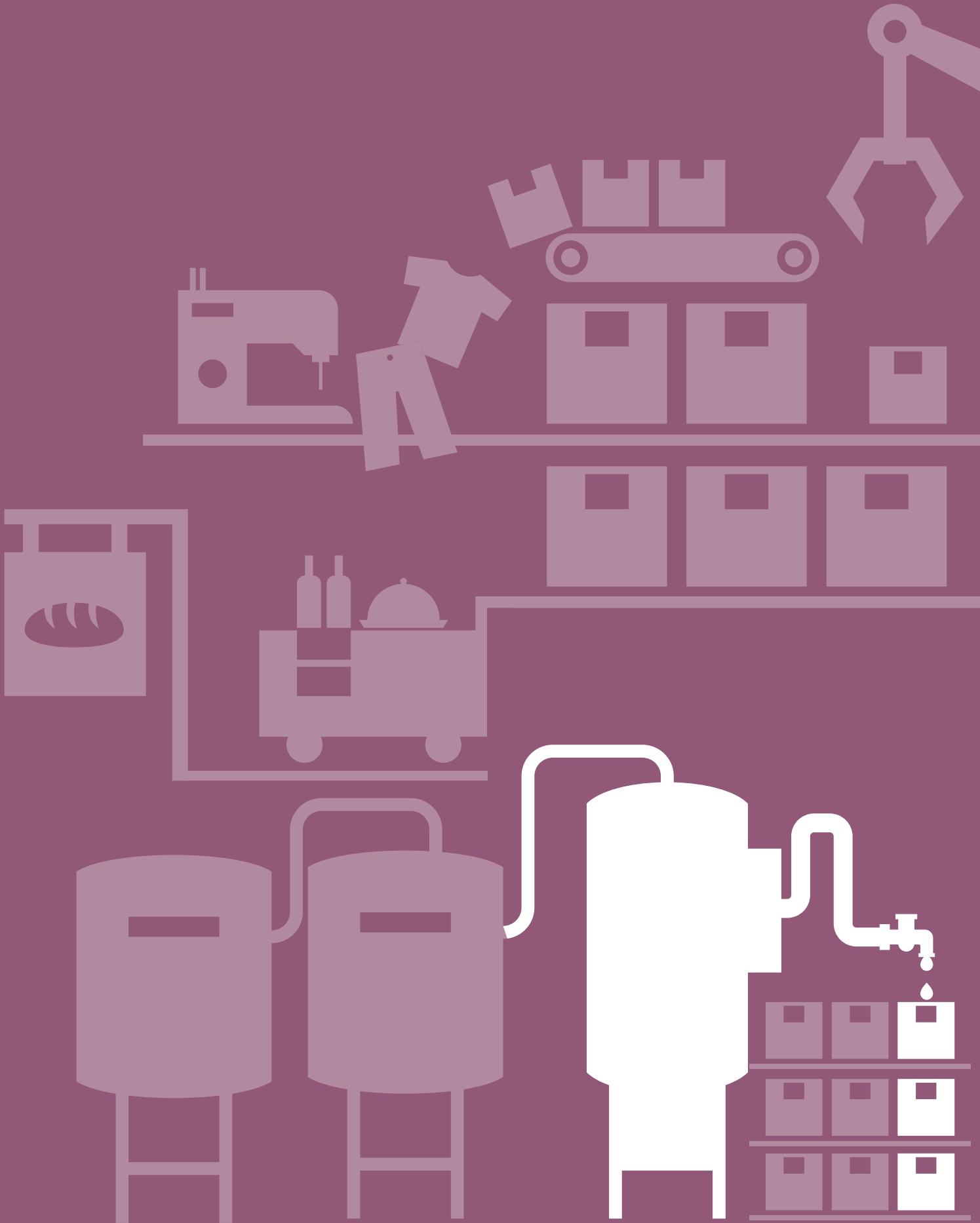


Site 1 + 2 + 4

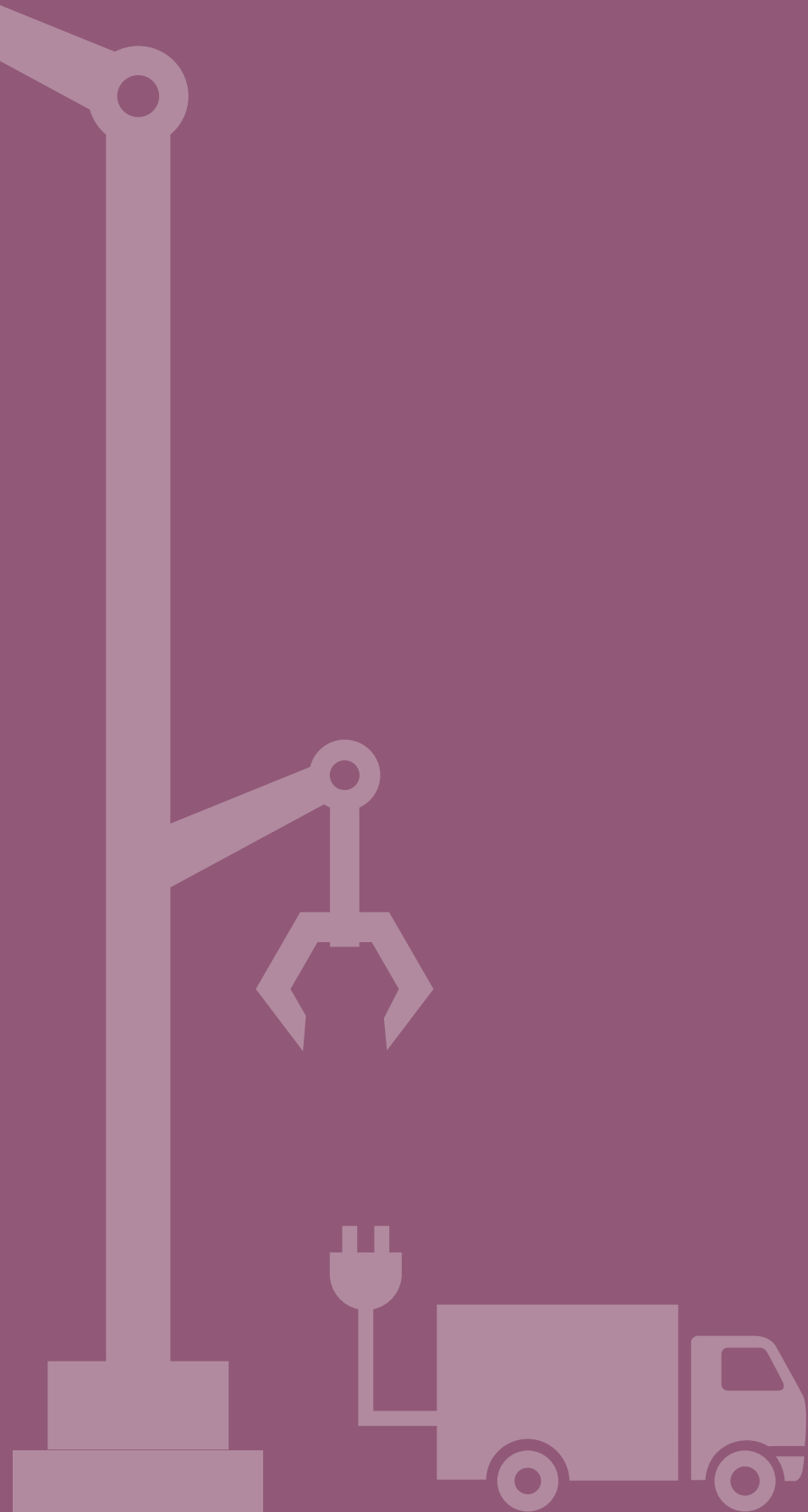


Site 1 + 3 (option a) + 4





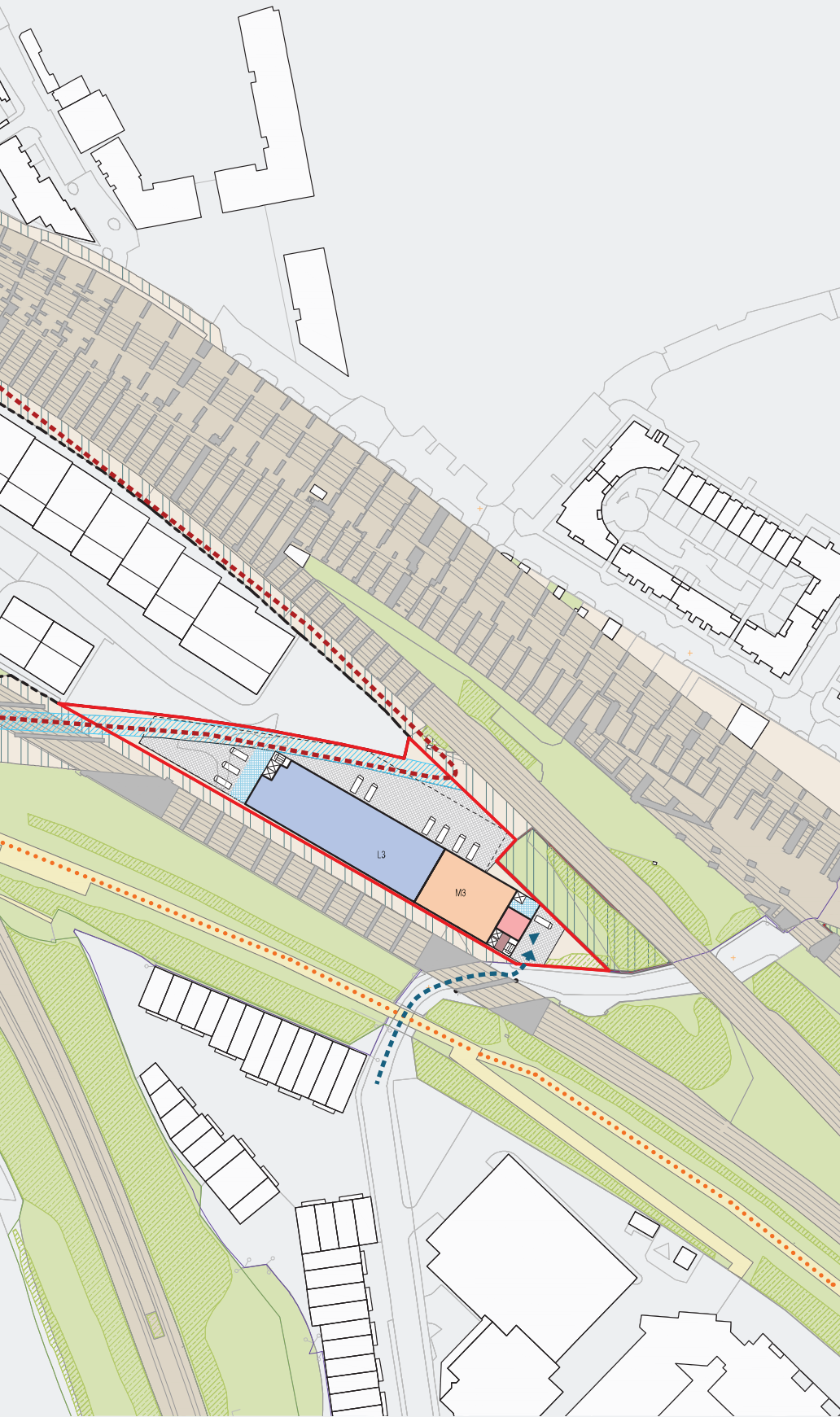
SITE 1 & 2





Servicing & Access

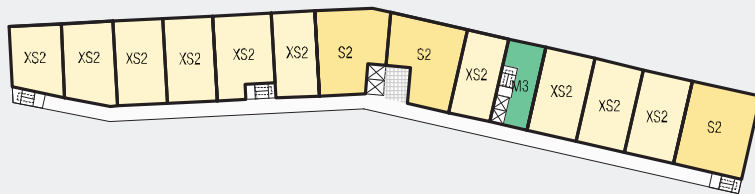
- Sites 1 & 2 primary access via Jarrow Road
- Site has a secondary access from Bolina Road
- Independent development from Bermondsey Trading Estate



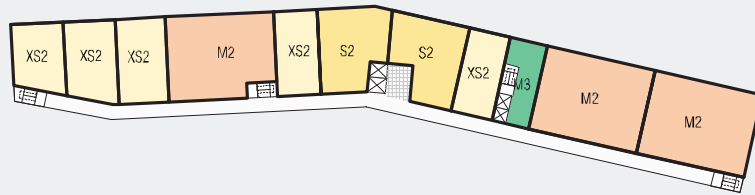
- Site Boundary
- - - Main Service Road
- - - Vehicular Access
- - - Visitor Access
- ▲ Building Access
- ● ● ● Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Kitchen/ Toilets

SITE 1

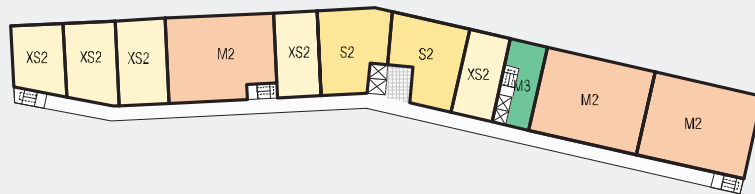
Level 3



Level 2



Level 1

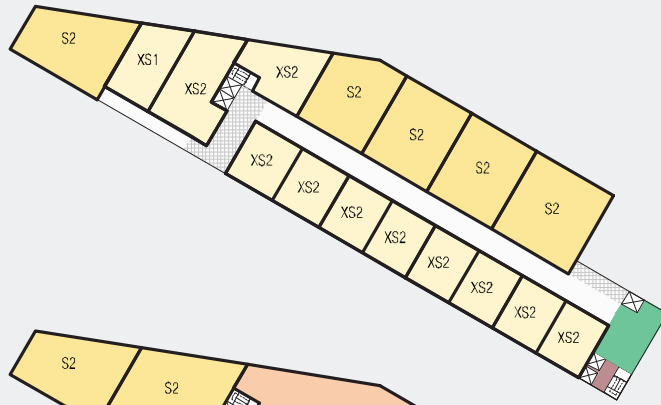


Ground

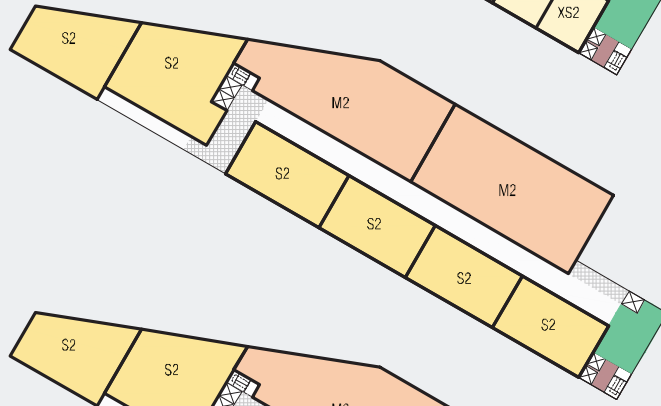


SITE 2

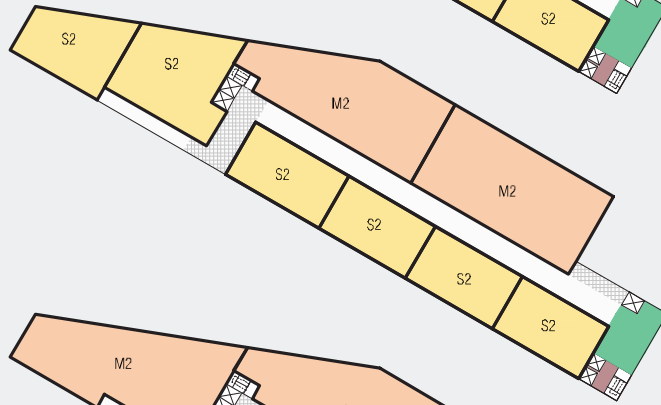
Level 4



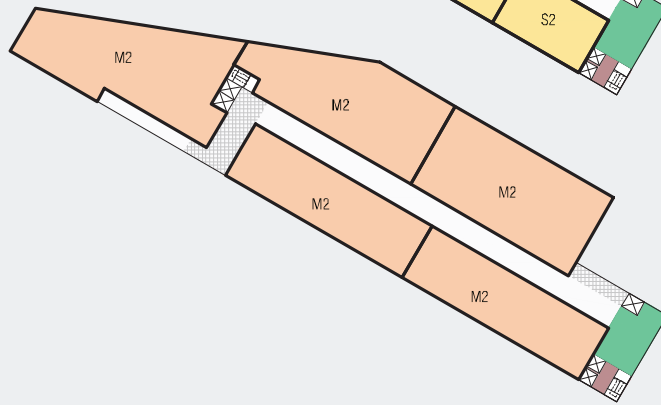
Level 3



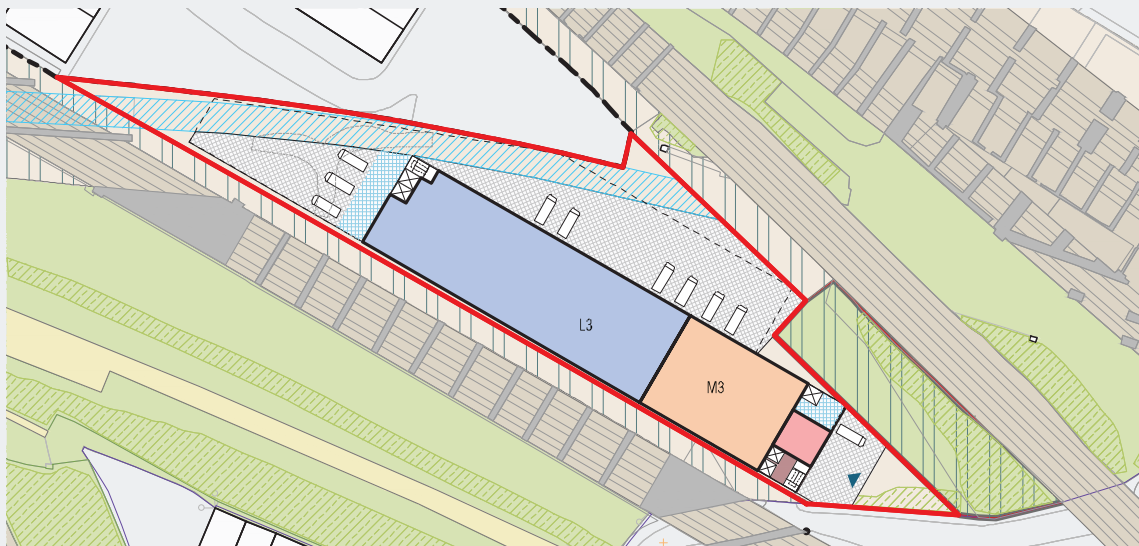
Level 2




Level 1



Ground



-  Site Boundary
-  Main Service Road
-  Vehicular Access
-  Visitor Access
-  Building Access
-  Cycling Links
-  Operational yard
-  Pedestrian areas
-  XS
-  S
-  M
-  L
-  Reception
-  Kitchen/ Toilets

Site			Existing Condition				GIA (sqm) by						
	Area (Ha)	Proposed Floors	Footprint	Floorspace	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1
I	0.43	2	0	0	0%	0%	0	900	0	0	1,050	0	0
I	0.43	4	0	0	0%	0%	0	2,400	900	0	1,550	600	0
2	0.49	3	0	0	0%	0%	0	0	0	0	1,650	0	0
2	0.49	5	0	0	0%	0%	0	1,550	0	0	4,700	0	0
Minimum Total							0	900	0	0	2,700	0	0
Maximum Total							0	3,950	900	0	6,250	600	0

- XS1: B1C
- XS2: B1b, B1c
- XS3: B1C
- S1: B1C, B8
- S2: B1C
- S3: B1C
- M1: B1C, B2
- M2: B1b, B1c
- M3: B1c, B2, B8
- L1: B1c, B2
- L2: B2
- L3: B2, B8
- XL: B8

Unit						Total						
M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Buildings GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift %	Uplift GEA
1,100	0	0	0	1,250	0	4,300	5,723	5,900	68%	137%	137%	5,900
2,200	0	0	0	1,250	0	8,900	11,446	11,800	68%	274%	274%	11,800
4,200	550	0	0	1,250	0	7,650	9,264	9,550	41%	195%	195%	9,550
5,500	550	0	0	1,250	0	13,550	16,587	17,100	41%	349%	349%	17,100
5,300	550	0	0	2,500	0	11,950	14,987	15,450				15,450
7,700	550	0	0	2,500	0	22,450	28,033	28,900				28,900







Rotherhithe New Road



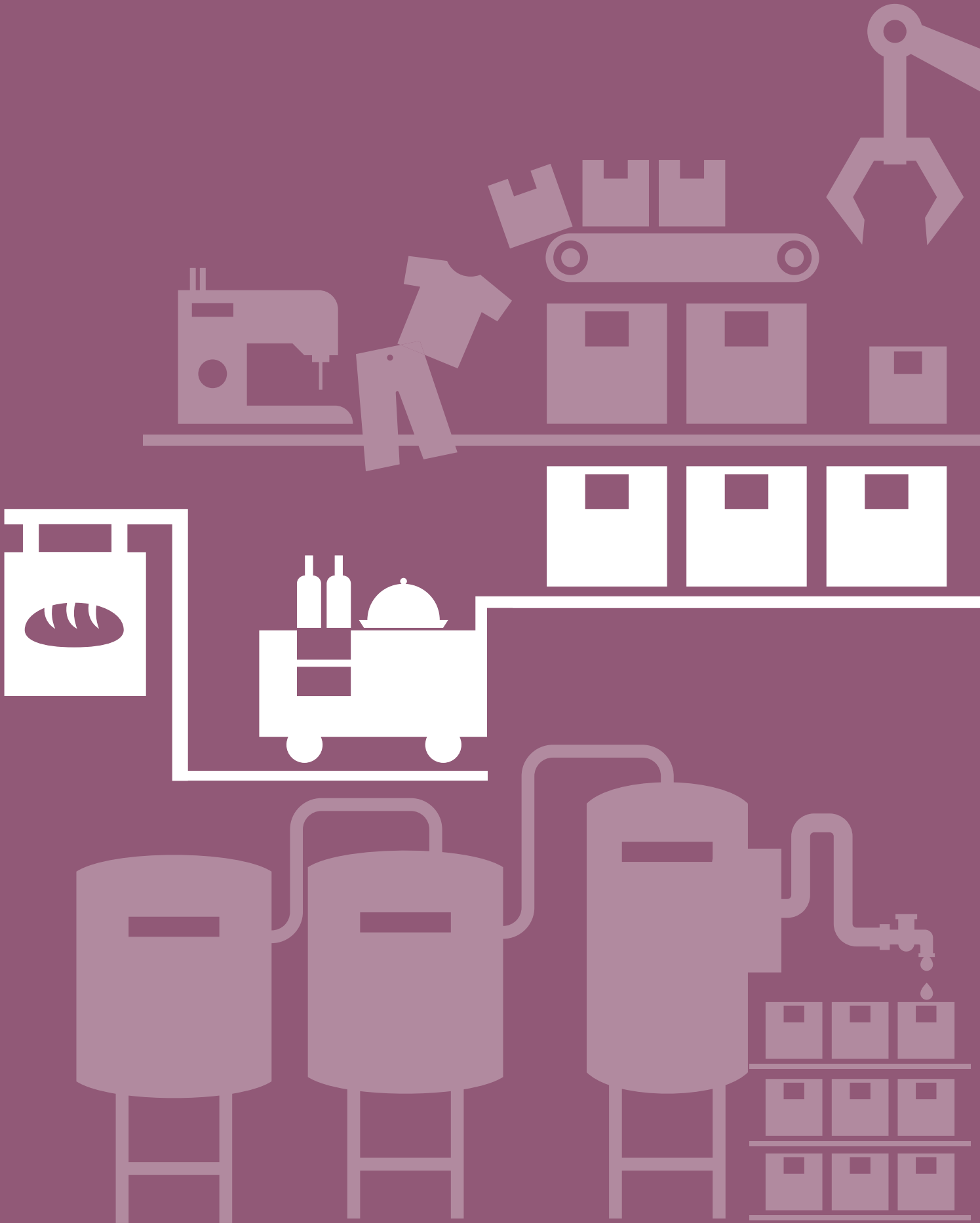
Ilderton Road



Ilderton Road

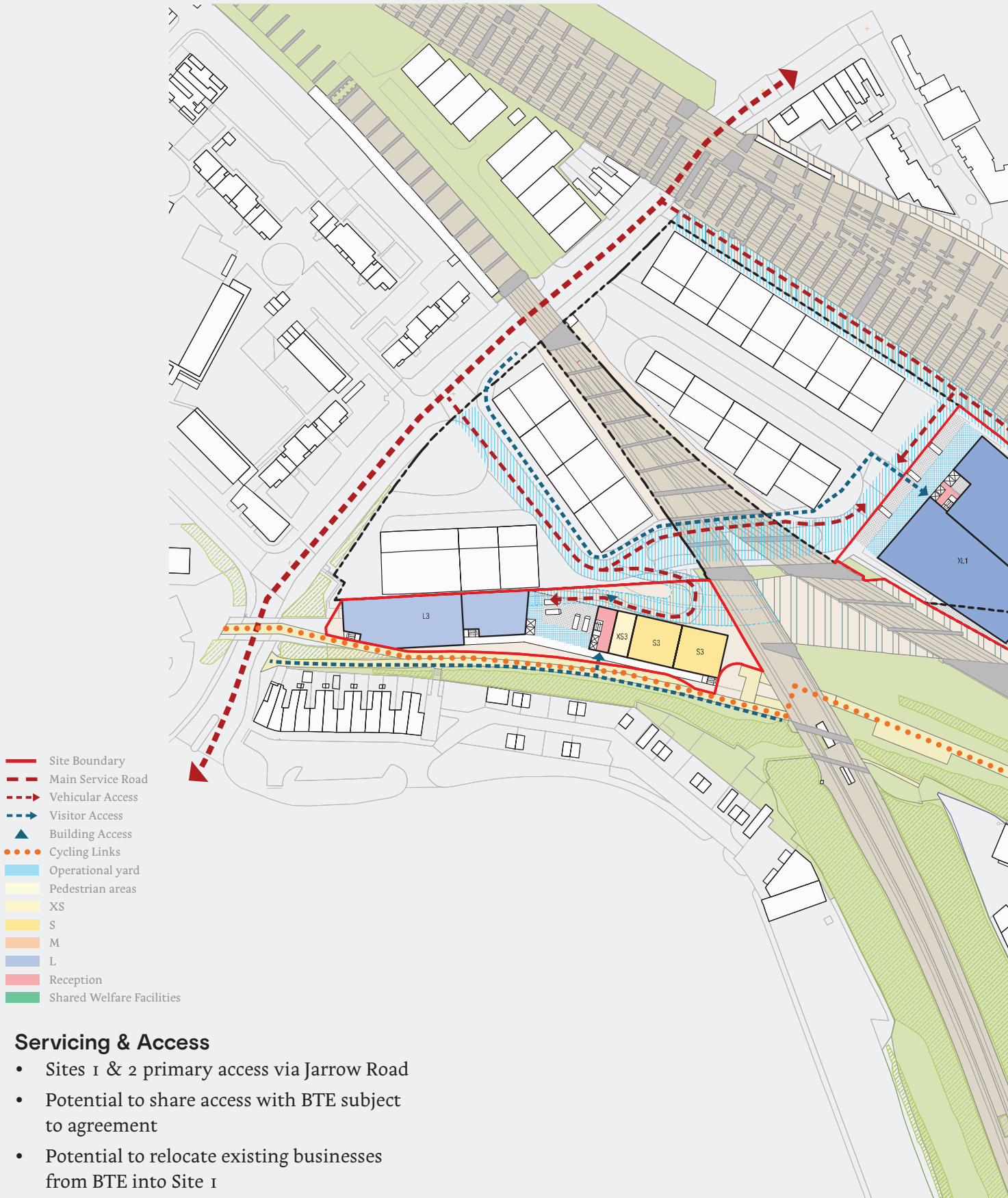


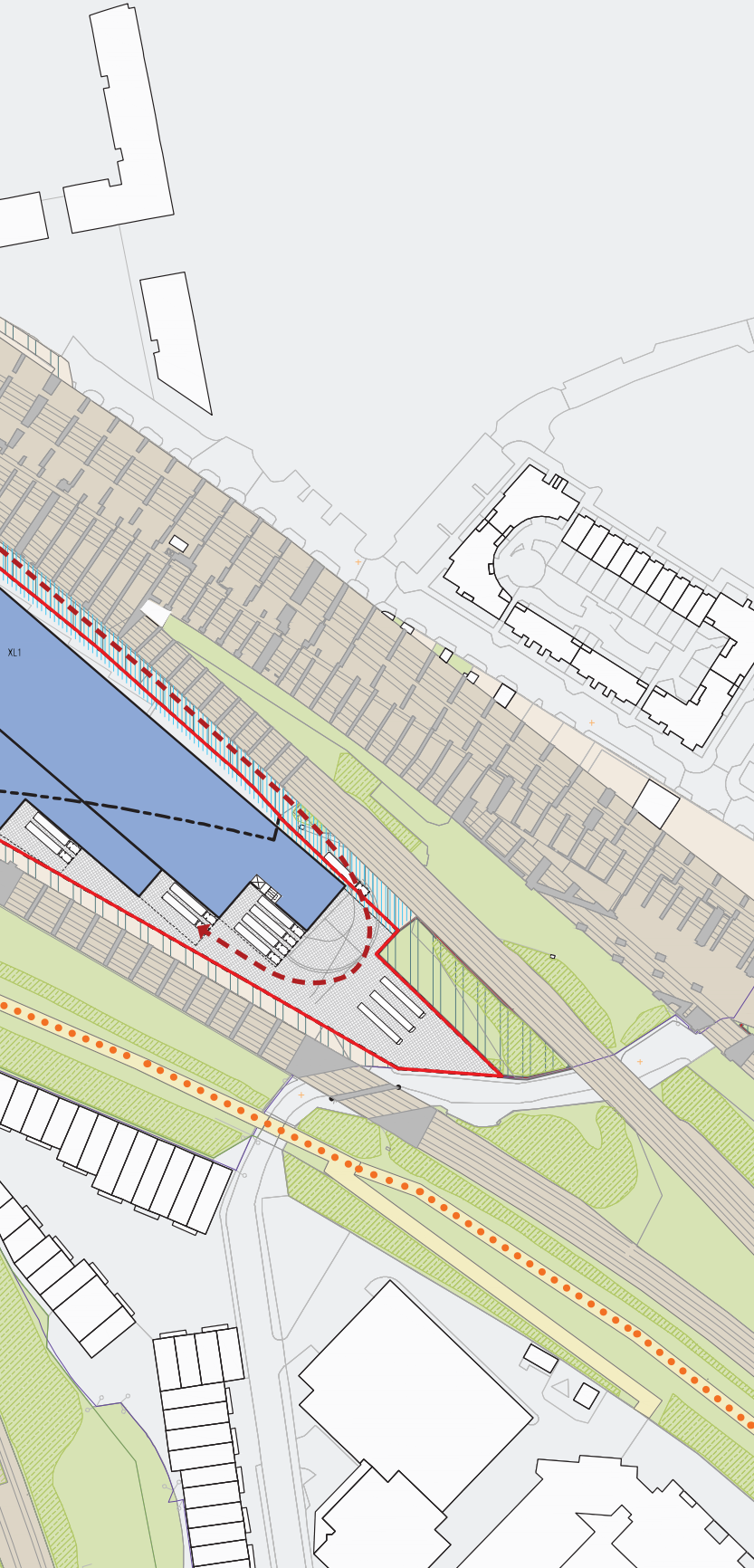
Stubbs Drive



SITE 1, 2 & 3 OPTION A

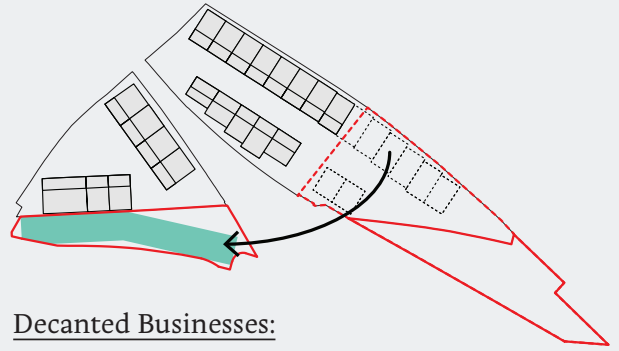






Phasing

1



Decanted Businesses:

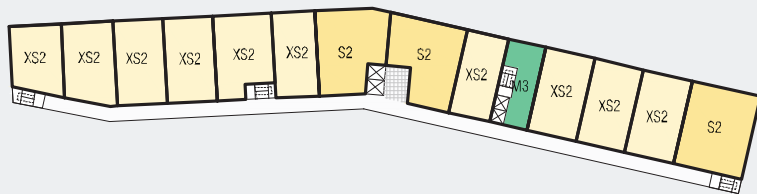
Site Area:		11219	
Site	Business Name	GF Floorspace	Total floorspace
2a	Fourpure Brewing 2	782	782
2a	Vacant	364	364
2a	Bermondsey ambulance station	288	374
2a	CMS Distribution	1096	1424
2a	CSM Logistics	357	464
2a	Jigsaw Colour Ltd.	284	369
Total		3170	3777
Plot Coverage		28%	
Plot Ratio		34%	

2

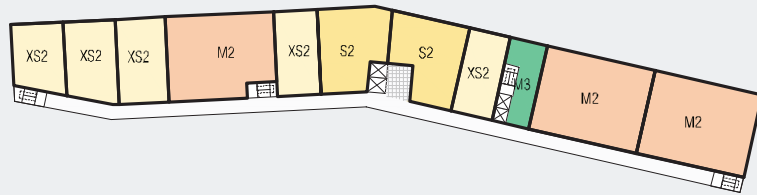


SITE 1

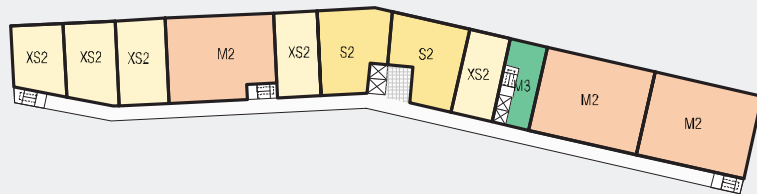
Level 3



Level 2



Level 1



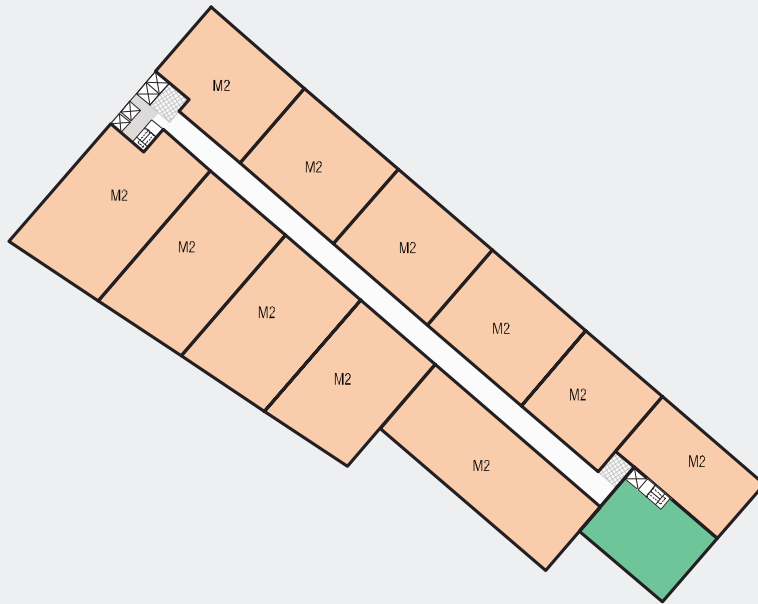
Ground



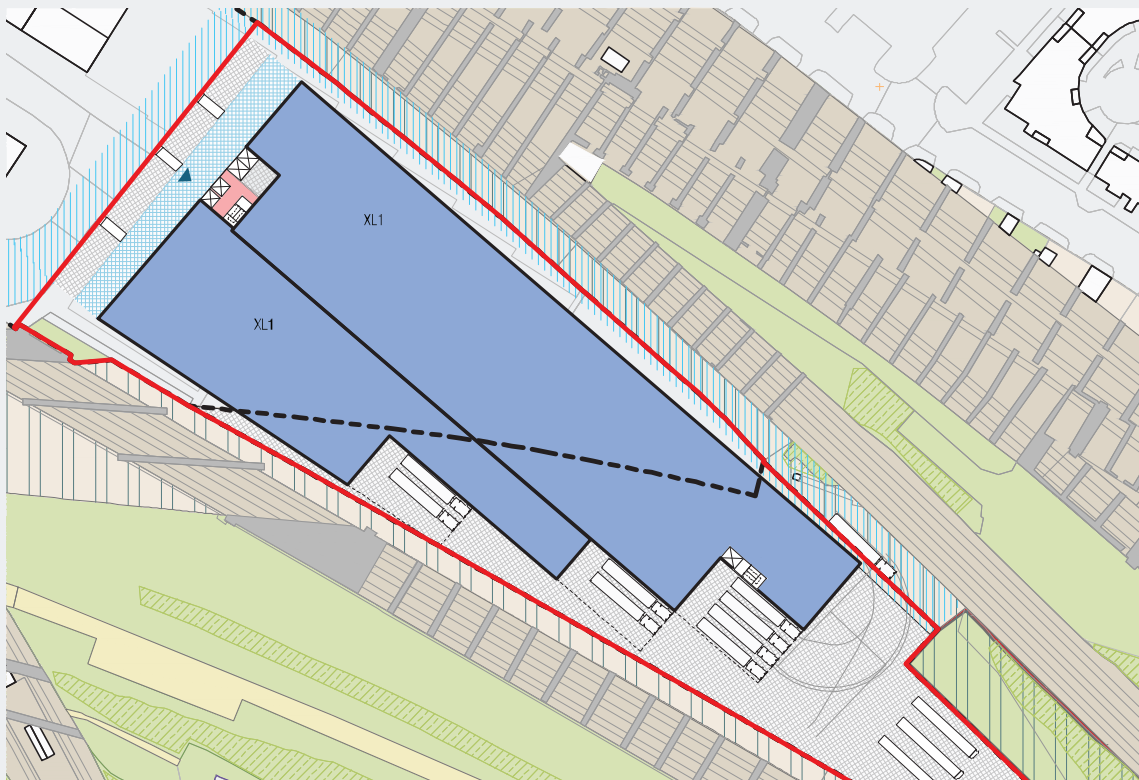
SITE 2 A

- Site Boundary
- - - Main Service Road
- - - Vehicular Access
- - - Visitor Access
- ▲ Building Access
- ● ● Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Kitchen/ Toilets














Level 1, 2, 3, 4



Ground



Site			Existing Condition				GIA (sqm)						
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1
I	0.43	2	0	0	0%	0%	0	900	0	0	1,050	0	0
I	0.43	4	0	0	0%	0%	0	2,400	900	0	1,550	600	0
2 + 3, Option A	1.12	3	3,170	3,777	28%	34%	0	0	0	0	0	0	0
2 + 3, Option A	1.12	5	3,170	3,777	28%	34%	0	0	0	0	0	0	0
Minimum Total							0	900	0	0	1,050	0	0
Maximum Total							0	2,400	900	0	1,550	600	0

	XS1: B1C
	XS2: B1b, B1c
	XS3: B1C
	S1: B1C, B8
	S2: B1C
	S3: B1C
	M1: B1C, B2
	M2: B1b, B1c
	M3: B1c, B2, B8
	L1: B1c, B2
	L2: B2
	L3: B2, B8
	XL: B8

by Unit							Total						
	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift %	Uplift GEA
	1,100	0	0	0	1,250	0	4,300	5,723	5,900	68%	137%	137%	5,900
	2,200	0	0	0	1,250	0	8,900	11,446	11,800	68%	274%	274%	11,800
	12,200	0	0	0	0	6,300	18,500	20,225	20,850	57%	186%	152%	17,073
	24,400	0	0	0	0	6,300	30,700	34,193	35,250	57%	287%	253%	31,473
	13,300	0	0	0	1,250	6,300	22,800	25,948	26,750				22,973
	26,600	0	0	0	1,250	6,300	39,600	45,639	47,050				43,273







Rotherhithe New Road



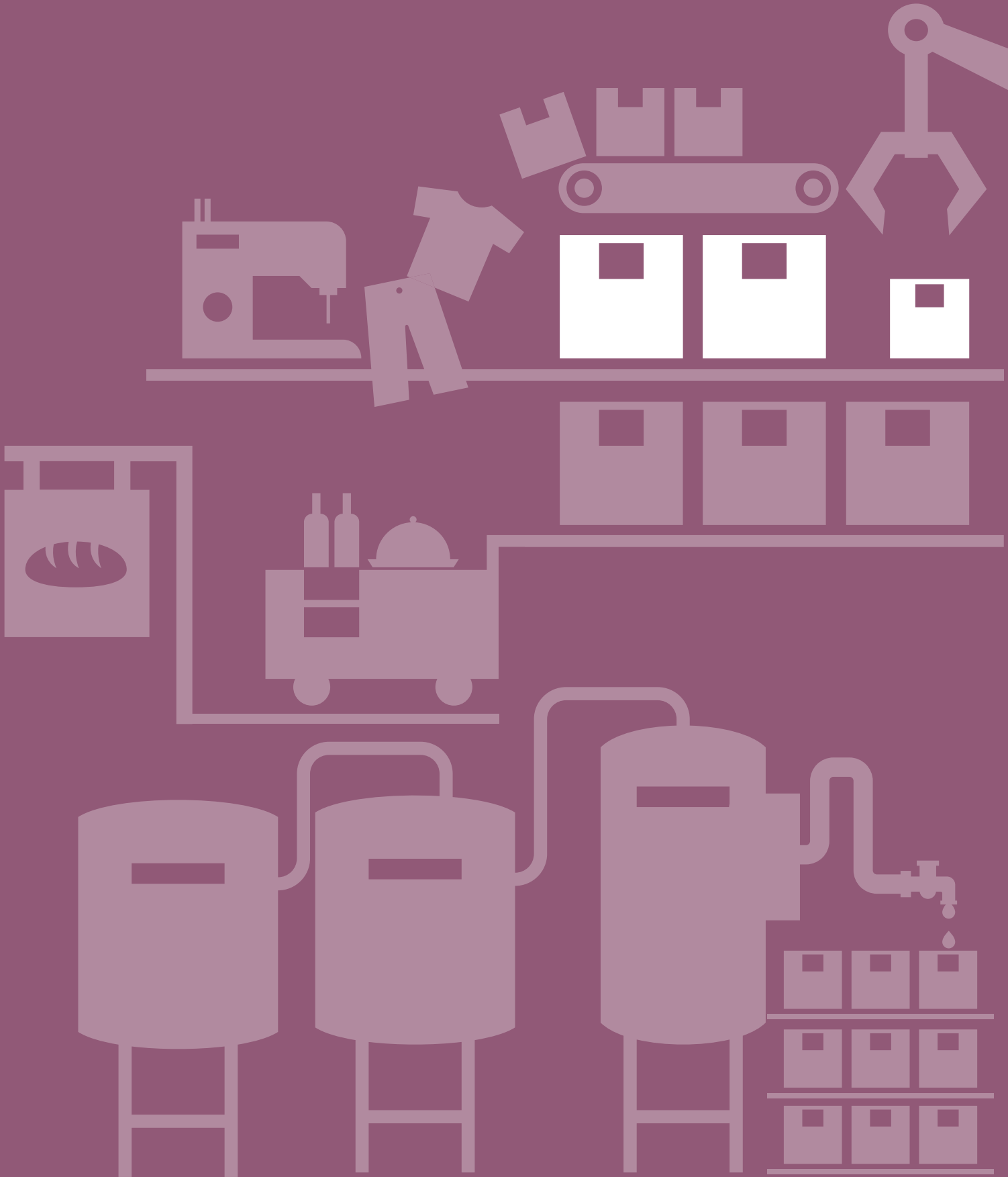
Ilderton Road



Ilderton Road

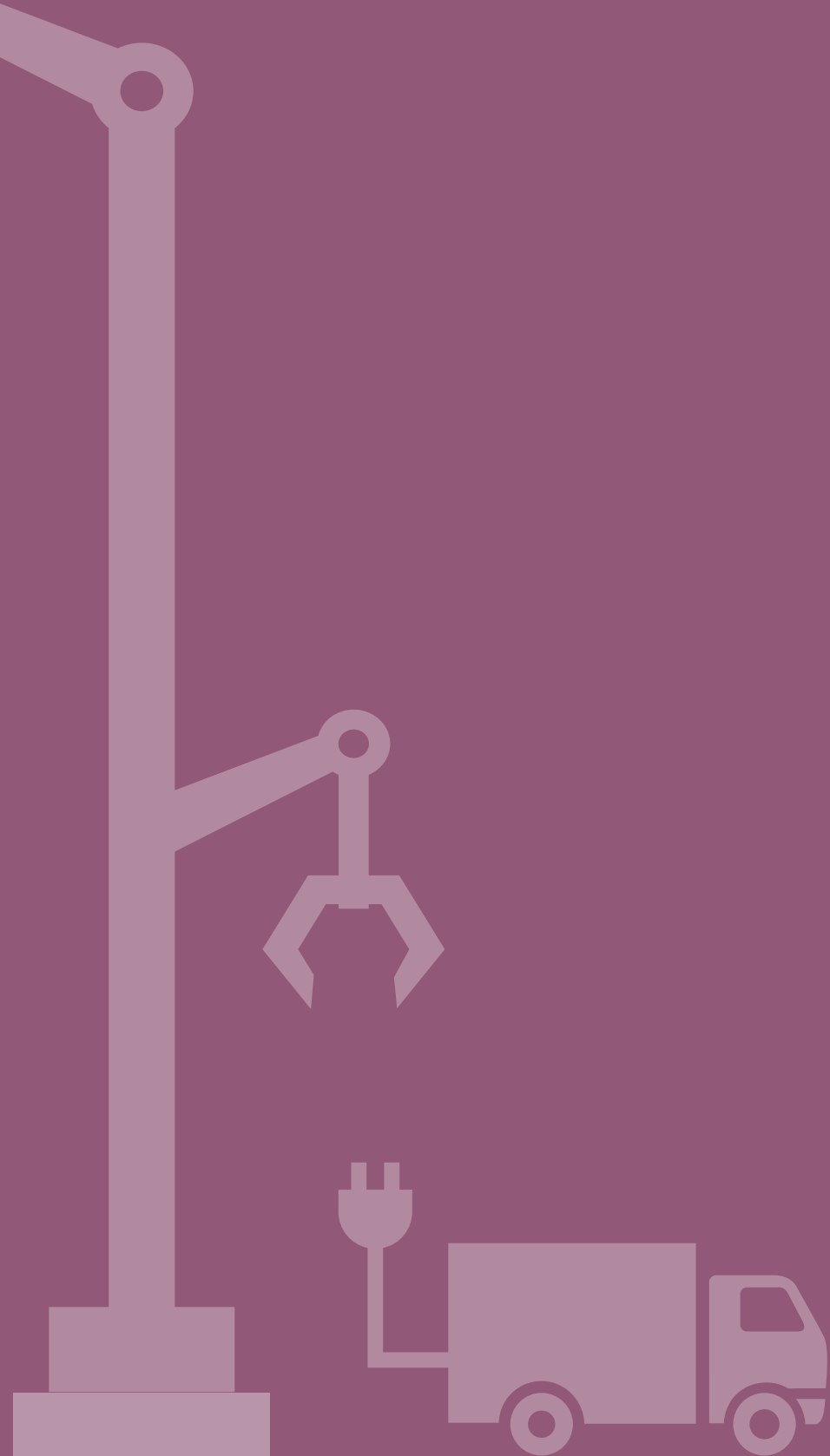


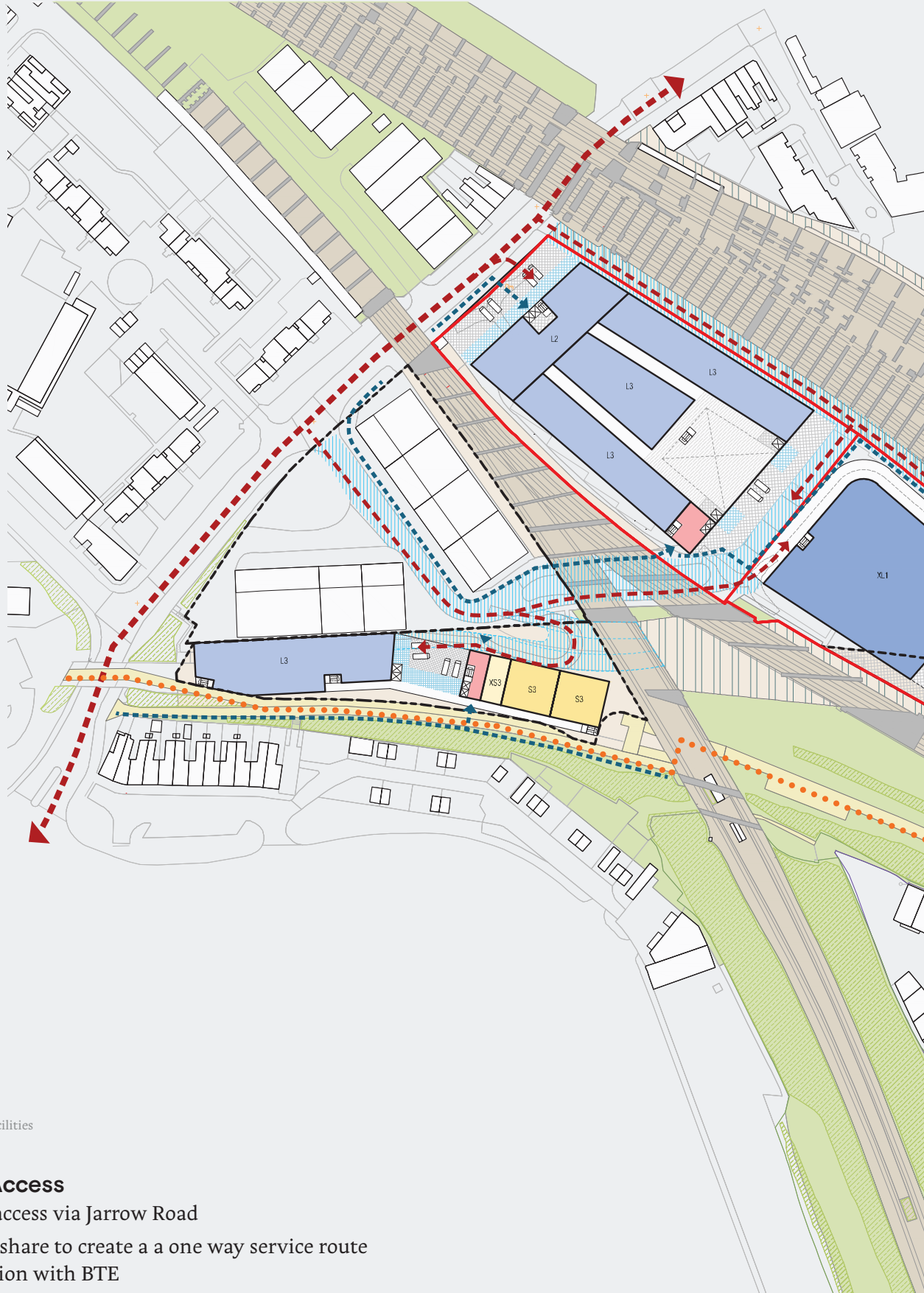
Stubbs Drive



SITE 1, 2 & 3

OPTION B

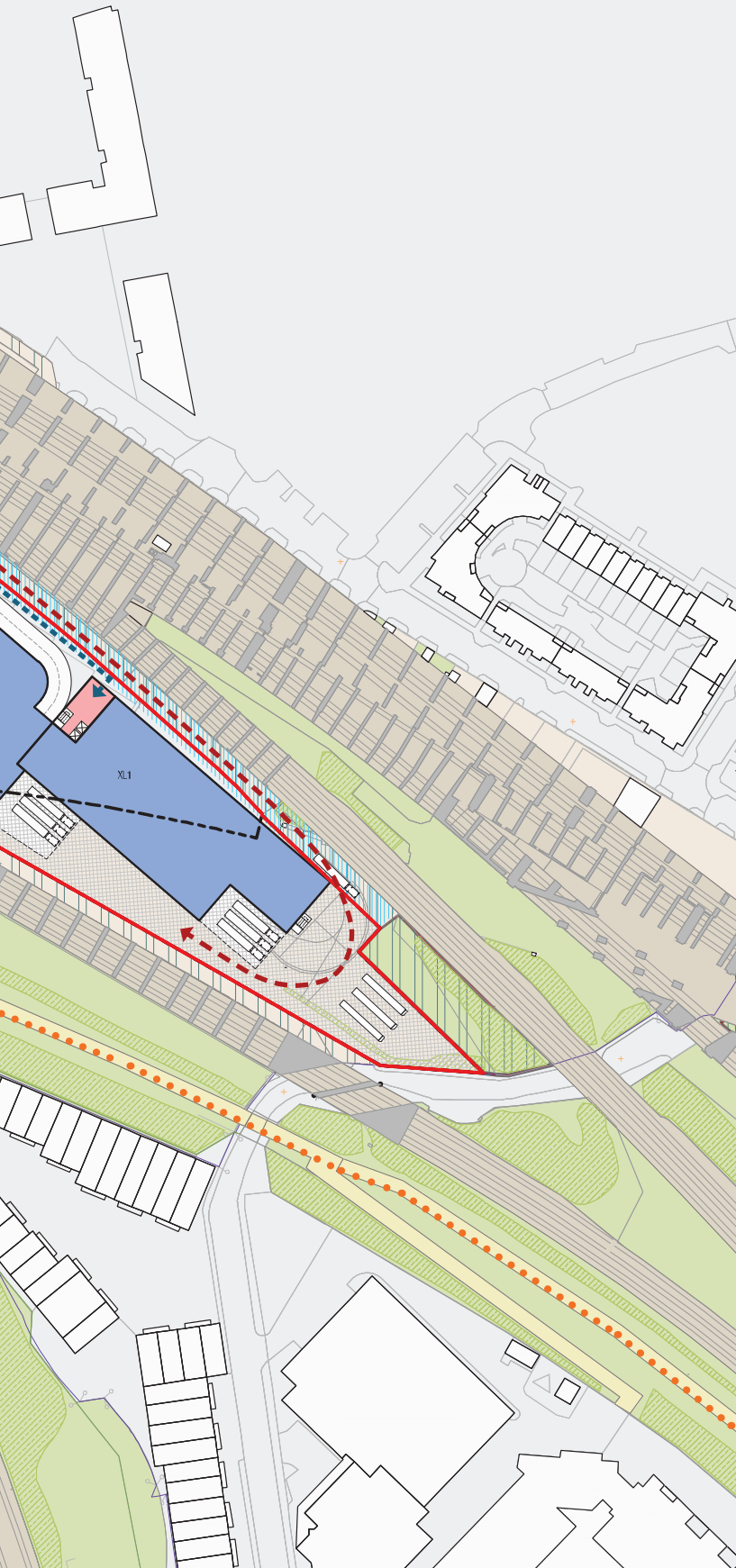




- Site Boundary
- Main Service Road
- Vehicular Access
- Visitor Access
- ▲ Building Access
- Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Shared Welfare Facilities

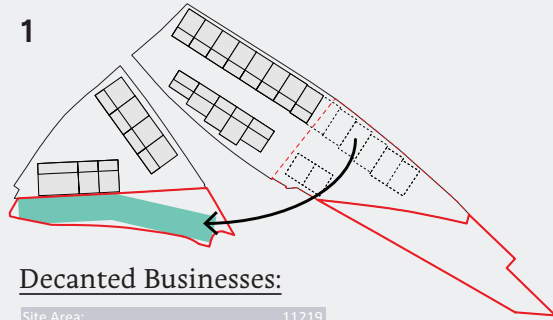
Servicing & Access

- Sites 1 & 2 access via Jarrow Road
- Potential to share to create a one way service route in combination with BTE



Phasing

1



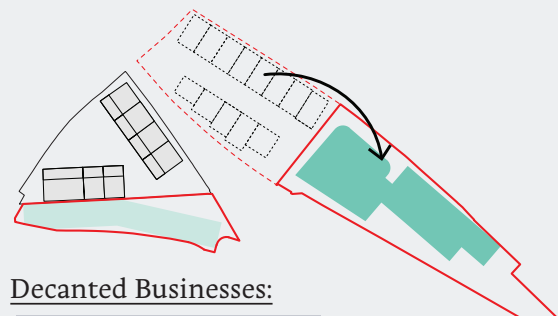
Decanted Businesses:

Site Area: 11219		GF	Total
Site	Business Name	Floorspace	floorspace
2a	Fourpure Brewing 2	782	782
2a	Vacant	364	364
2a	Bermondsey ambulance station	288	374
2a	CMS Distribution	1096	1424
2a	CSM Logistics	357	464
2a	Jigsaw Colour Ltd.	284	369
Total		3170	3777
Plot Coverage		28%	
Plot Ratio		34%	

2



3



Decanted Businesses:

Site Area: 9712		GF	Total
Site	Business Name	Floorspace	floorspace
3	Affinity Brew Co	1106	1106
3	Amey	333	433
3	Benugo	375	487
3	Moving venue catering	738	959
3	Smart Hospitality	374	486
3	Southside Waterjet Ltd.	350	455
3	Terminal Studios	363	471
3	Direct Seafoods London	343	343
Total		3981	4741
Plot Coverage		41%	
Plot Ratio		49%	

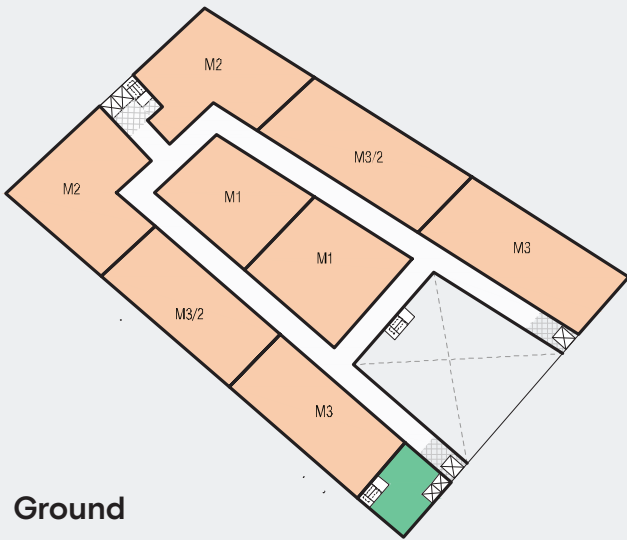
4



Level 4



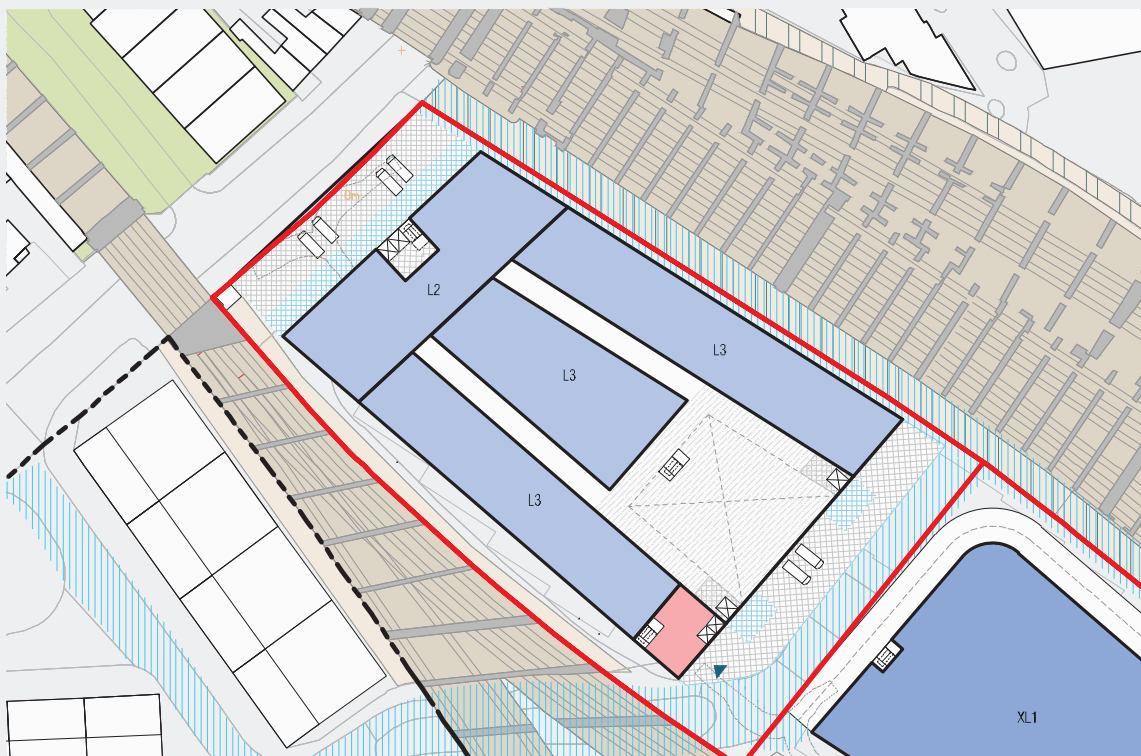
Level 1 & 2



Level 3

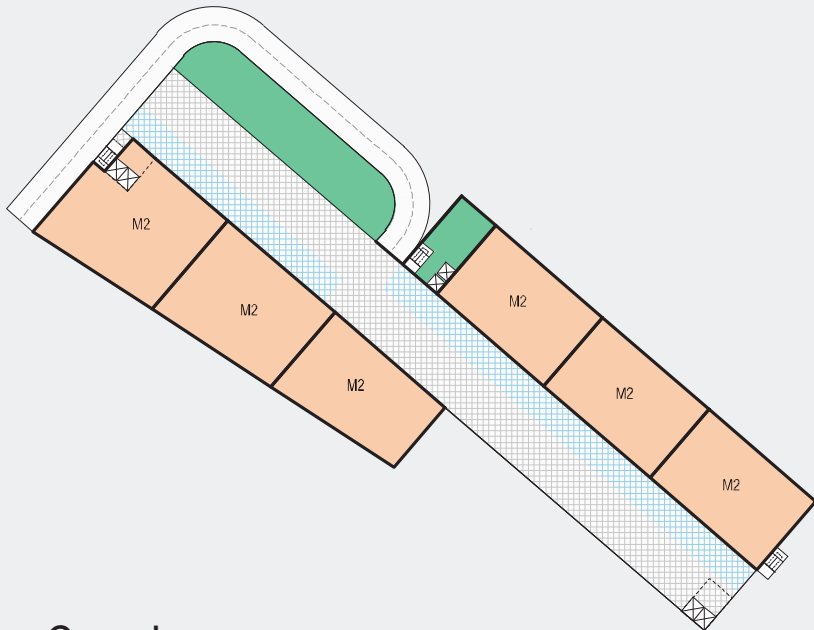


Ground

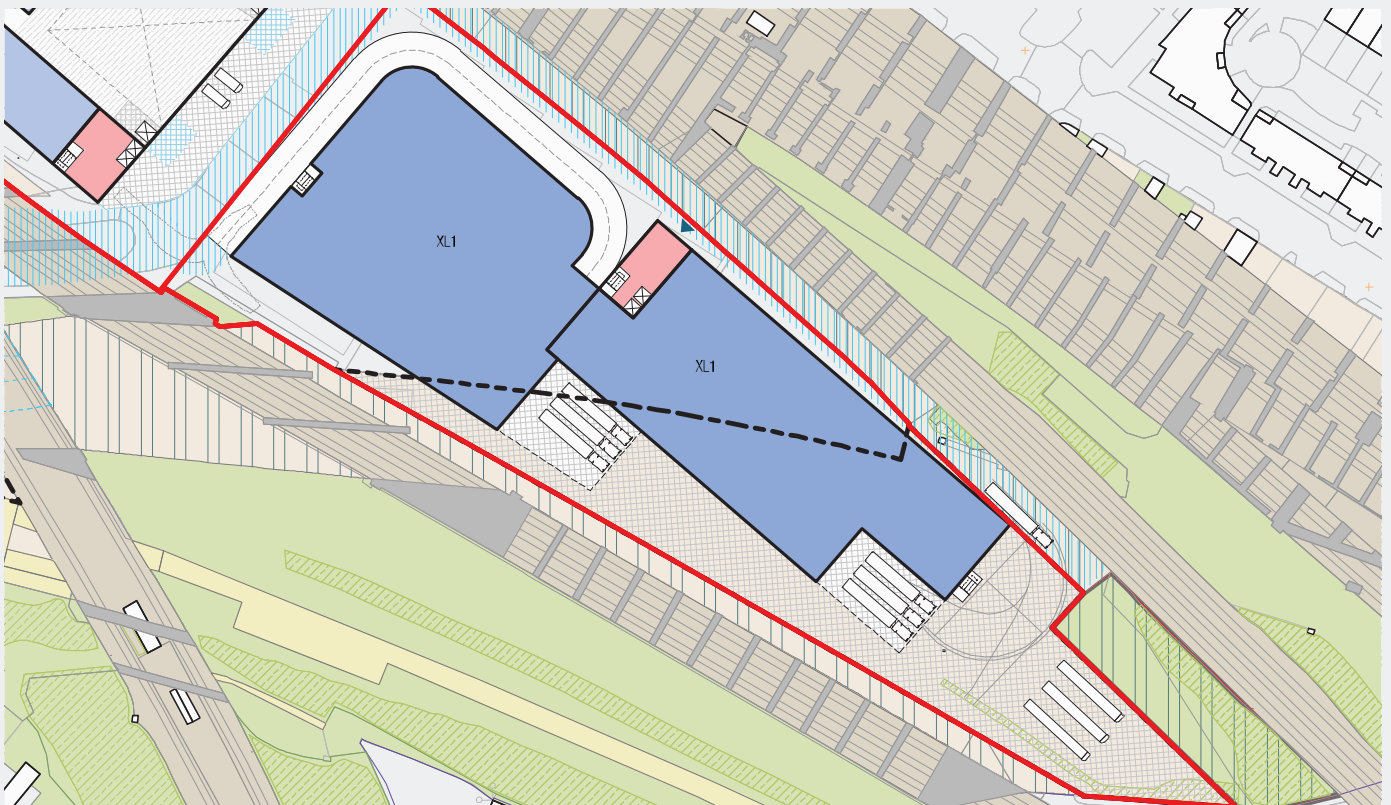


- Site Boundary
- Main Service Road
- Vehicular Access
- Visitor Access
- Building Access
- Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Kitchen/ Toilets














Level 1



Ground



Site			Existing Condition				GIA (sqm)						
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1
I	0.43	2	0	0	0	0	0	900	0	0	1,050	0	0
I	0.43	4	0	0	0%	0%	0	2,400	900	0	1,550	600	0
2 + 3 Option B	1.12	2	3,170	3,777	28%	34%	0	0	0	0	0	0	0
Site 3 (Front)	0.97	3	3,981	4,741	41%	49%	0	0	0	0	0	0	1,850
Site 3 (Front)	0.97	5	3,981	4,741	41%	49%	950	2,100	950	950	2,000	1,150	1,850
Minimum Total							0	900	0	0	1,050	0	1,850
Maximum Total							950	4,500	1,850	950	3,550	1,750	1,850

	XS1: B1C
	XS2: B1b, B1c
	XS3: B1C
	S1: B1C, B8
	S2: B1C
	S3: B1C
	M1: B1C, B2
	M2: B1b, B1c
	M3: B1c, B2, B8
	L1: B1c, B2
	L2: B2
	L3: B2, B8
	XL: B8

by Unit							Total						
	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift%	Uplift GEA
	1,100	0	0	0	1,250	0	4,300	5,723	5,900	68%	137%	137%	5,900
	2,200	0	0	0	1,250	0	8,900	11,446	11,800	68%	274%	274%	11,800
	3,300	0	0	0	0	5,650	8,950	9,021	9,300	52%	83%	49%	5,523
0	2,050	4,200	0	1,050	3,150	0	12,300	15,763	16,250	56%	168%	119%	11,509
0	2,050	4,200	0	1,050	3,150	0	20,400	26,287	27,100	56%	279%	230%	22,359
0	6,450	4,200	0	1,050	4,400	5,650	25,550	30,507	31,450				22,932
0	7,550	4,200	0	1,050	4,400	5,650	38,250	46,754	48,200				39,682







Rotherhithe New Road



Ilderton Road



Ilderton Road



Stubbs Drive



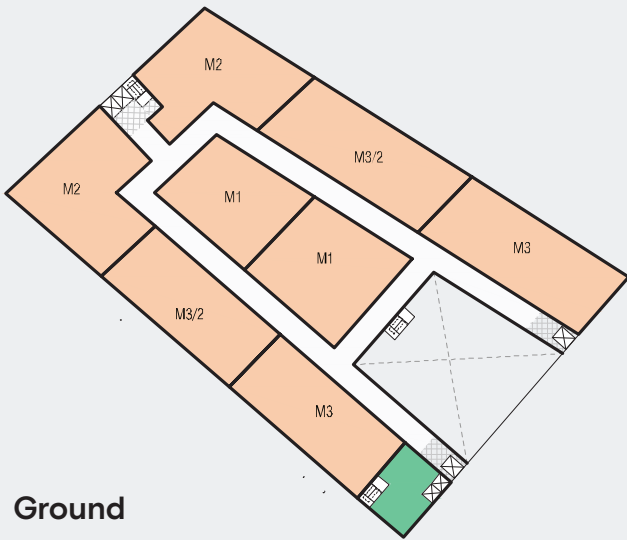
Rotherhithe New Road

SITE 1, 2 & 3 OPTION B+ FUTURE GROWTH

Level 4



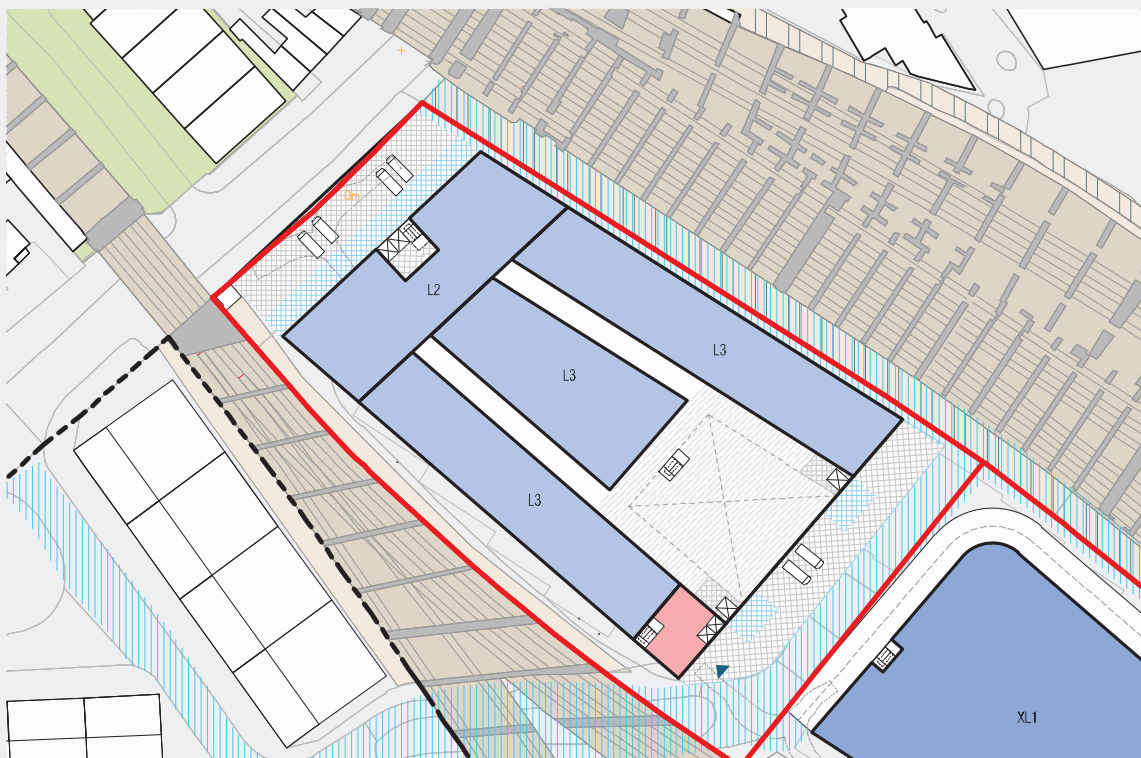
Level 1 & 2



Level 3



Ground



- Site Boundary
- - - Main Service Road
- - - Vehicular Access
- - - Visitor Access
- ▲ Building Access
- ● ● Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Shared Welfare Facilities

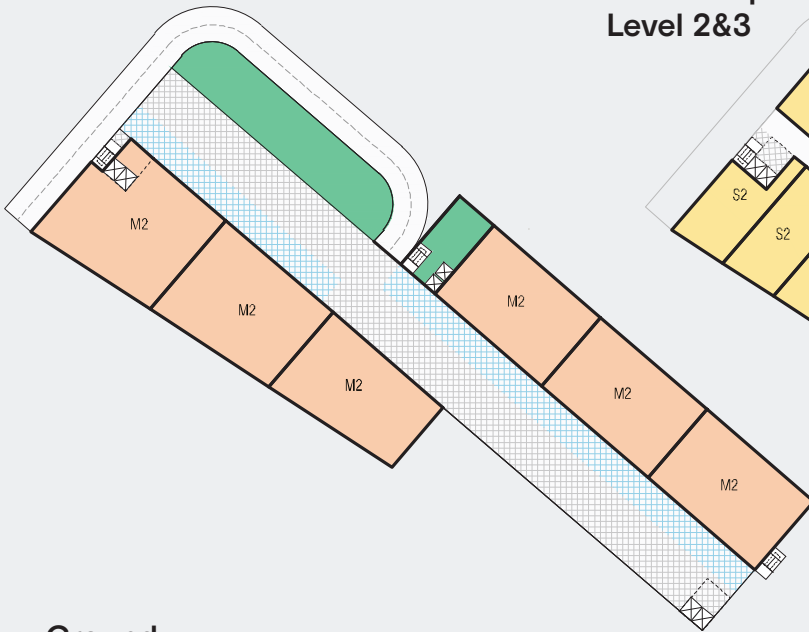
Future Expansion Level 4



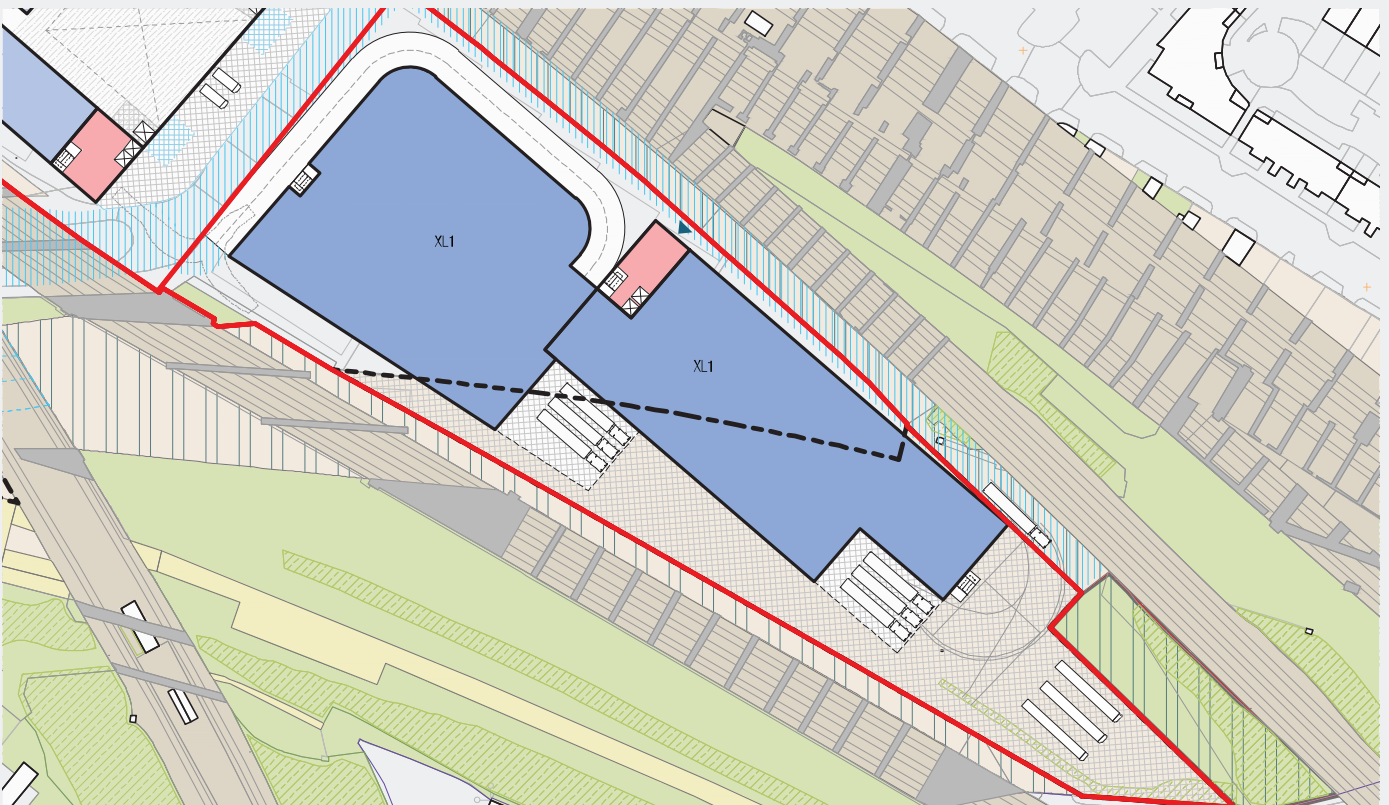
Future Expansion Level 2&3



Level 1



Ground



Site		Proposed Floors	Existing Condition				GIA (sqm)						
Area (Ha)	Footprint		Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1	
I	0.43	2	0	0	0%	0%	0	900	0	0	1,050	0	0
I	0.43	4	0	0	0%	0%	0	2,400	900	0	1,550	600	0
Site 2 + 3	1.12	5	3,170	3,777	28%	34%	0	2,900	0	0	13,250	0	0
Site 3 (Front)	0.97	3	3,981	4,741	41%	49%	0	0	0	0	0	0	1,850
Site 3 (Front)	0.97	5	3,981	4,741	41%	49%	950	2,100	950	950	2,000	1,150	1,850
Minimum Total							0	3,800	0	0	14,300	0	1,850
Maximum Total							950	7,400	1,850	950	16,800	1,750	1,850

- XS1: B1C
- XS2: B1b, B1c
- XS3: B1C
- S1: B1C, B8
- S2: B1C
- S3: B1C
- M1: B1C, B2
- M2: B1b, B1c
- M3: B1c, B2, B8
- L1: B1c, B2
- L2: B2
- L3: B2, B8
- XL: B8

by Unit							Total						
	M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift %	Uplift GEA
	1,100	0	0	0	1,250	0	4,300	5,723	5,900	68%	137%	137%	5,900
	2,200	0	0	0	1,250	0	8,900	11,446	11,800	68%	274%	274%	11,800
	3,300	0	0	0	0	5,650	25,100	30,798	31,750	52%	283%	249%	27,973
0	2,050	4,200	0	1,050	3,150	0	12,300	15,763	16,250	56%	168%	119%	11,509
0	2,050	4,200	0	1,050	3,150	0	20,400	26,287	27,100	56%	279%	230%	22,359
0	6,450	4,200	0	1,050	4,400	5,650	41,700	52,283	53,900				45,382
0	7,550	4,200	0	1,050	4,400	5,650	54,400	68,531	70,650				62,132







Rotherhithe New Road



Ilderton Road



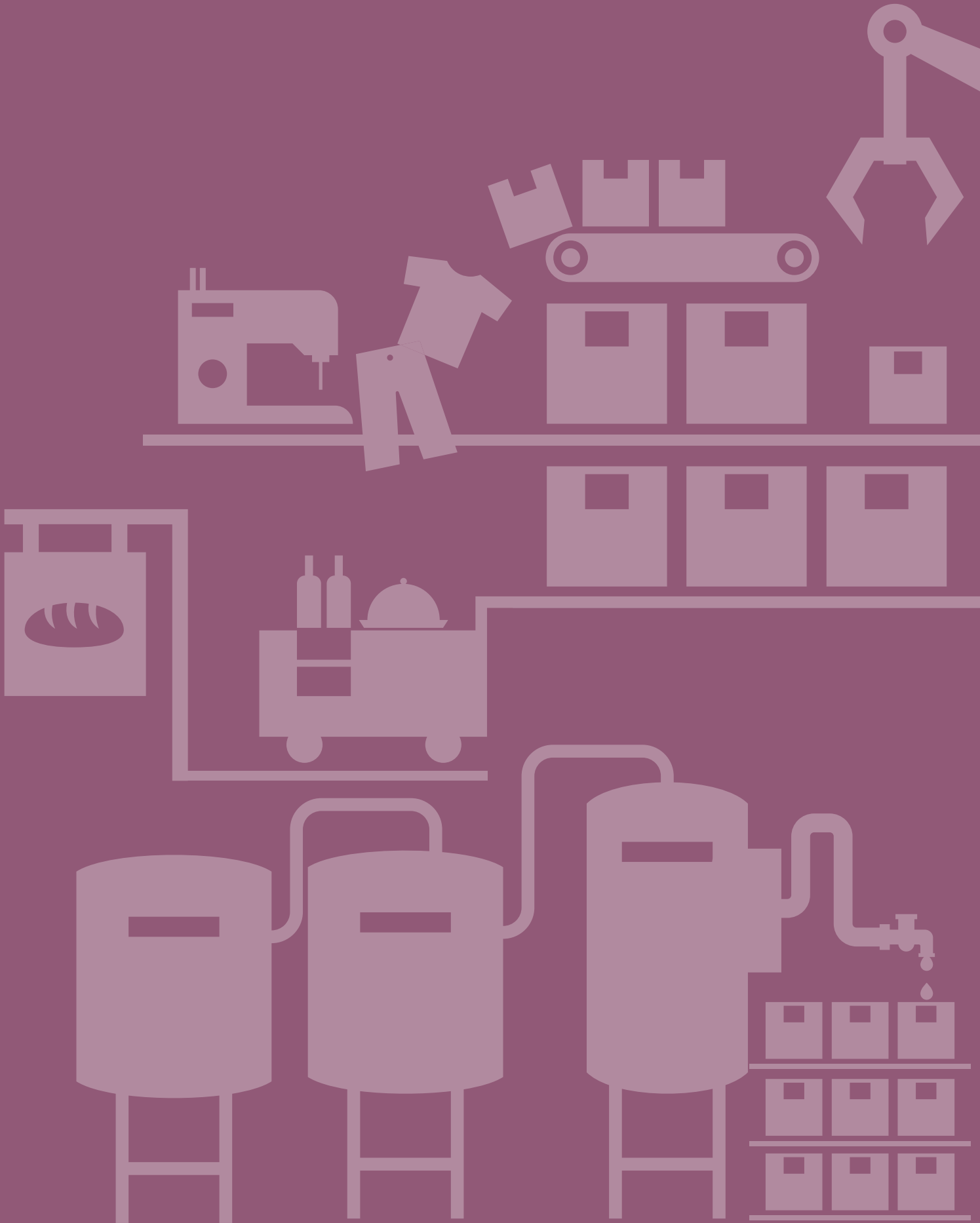
Ilderton Road



Stubbs Drive

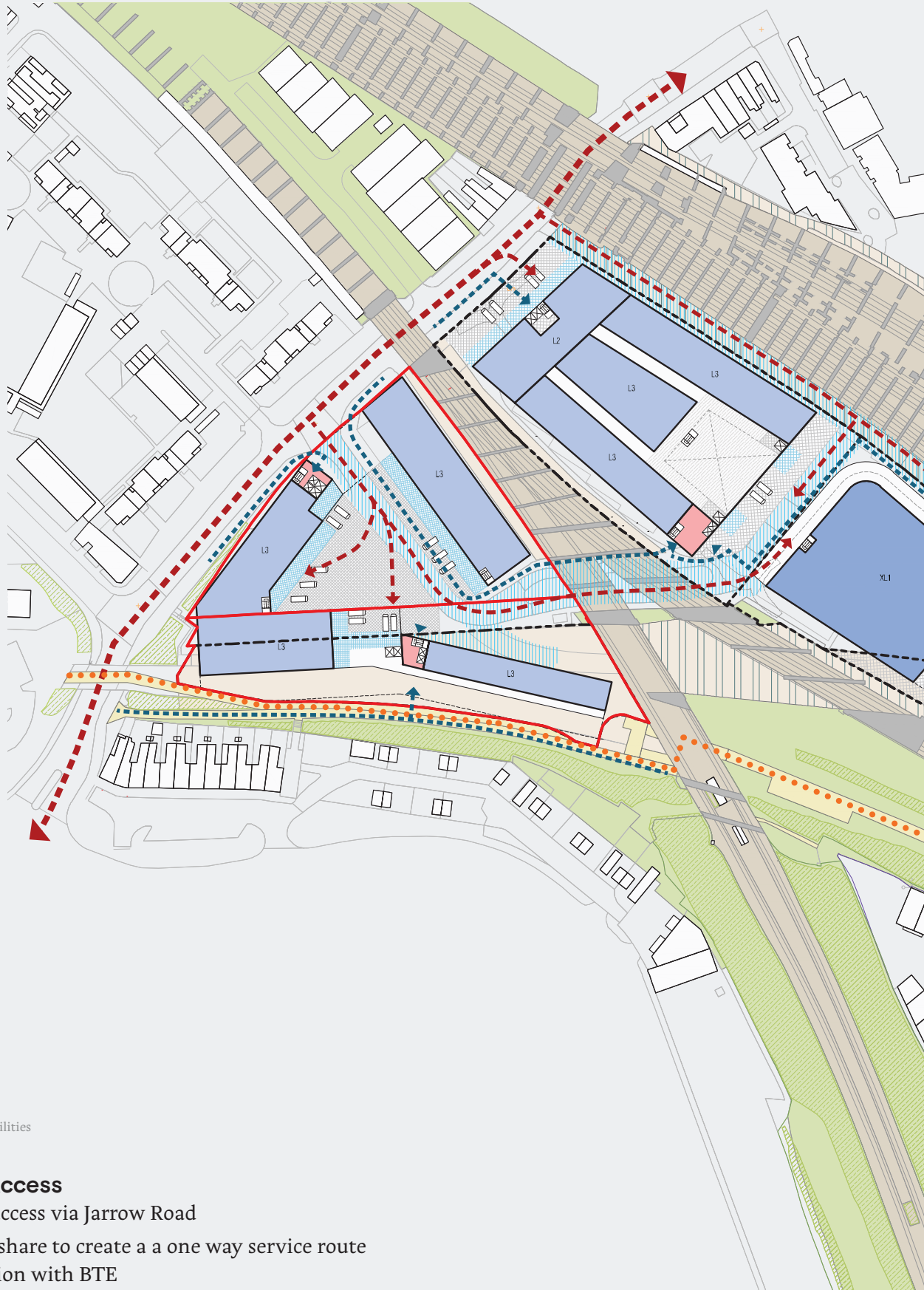


Rotherhithe New Road



SITE 1 + SITE 4

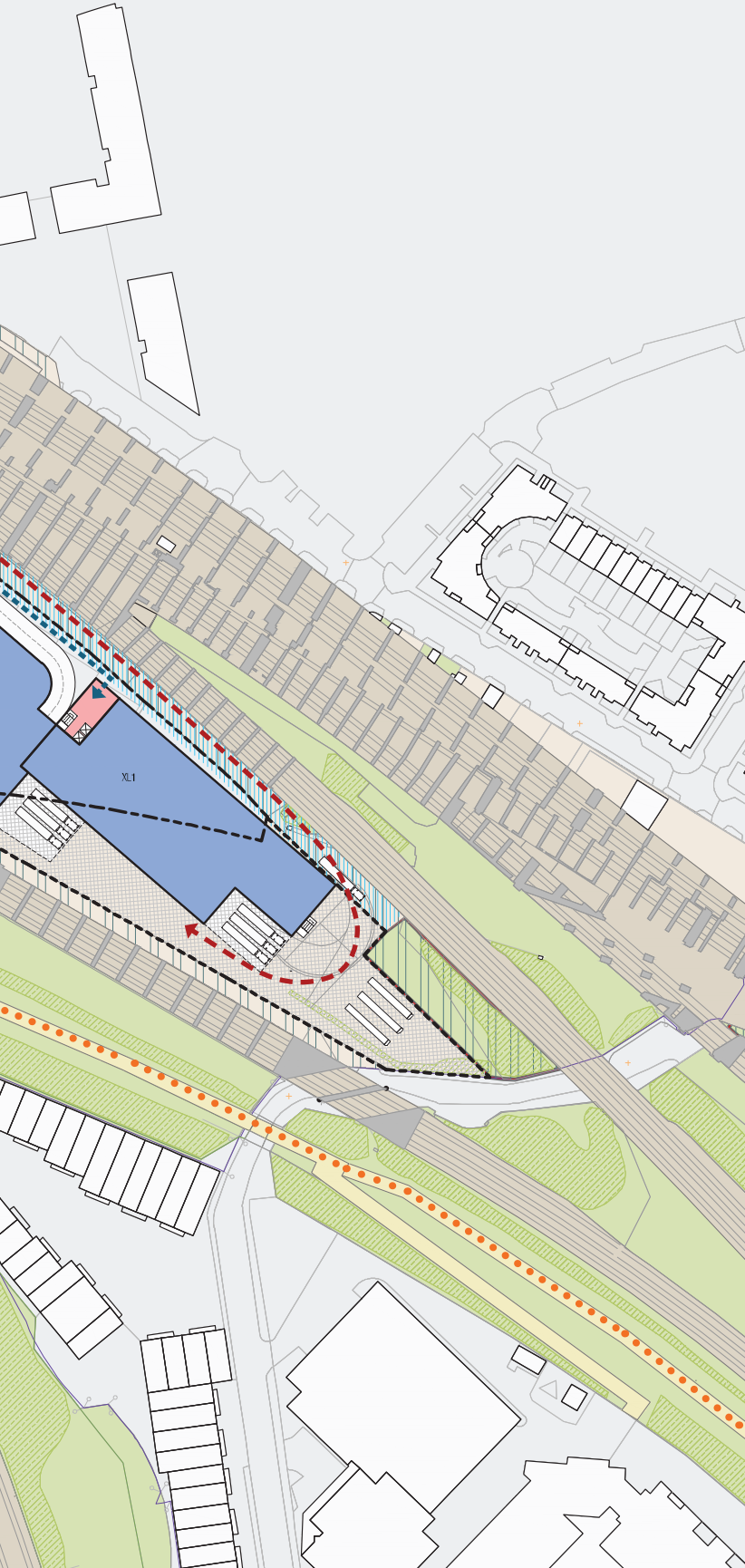




- Site Boundary
- - - Main Service Road
- - -> Vehicular Access
- - -> Visitor Access
- ▲ Building Access
- Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Shared Welfare Facilities

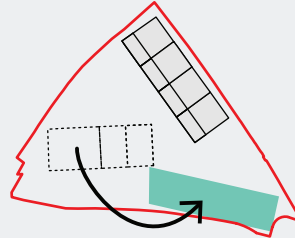
Servicing & Access

- Sites 1 & 2 access via Jarrow Road
- Potential to share to create a one way service route in combination with BTE



Phasing

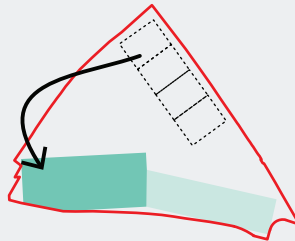
1



Decanted Businesses:

Site Area:		5689	
Site	Business Name	GF Floorspace	Total floorspace
1a	Bew electrical distributors	745	969
1a	City electrical factors	374	487
1a	Vacant	365	365
1a	Vacant	27	27
Total		1512	1848
Plot Coverage		27%	
Plot Ratio		32%	

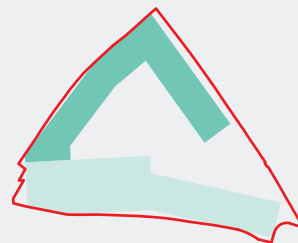
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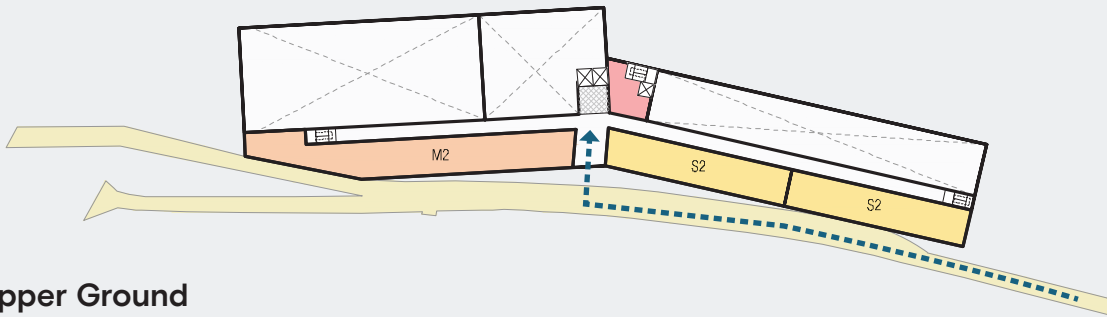


Decanted Businesses:

Site Area:		6541	
Site	Business Name	GF Floorspace	Total floorspace
4	Howdens Joinery 1	905	1177
4	Screwfix	440	572
4	Tool Station 2	446	580
Total		1792	2329
Plot Coverage		27%	
Plot Ratio		36%	

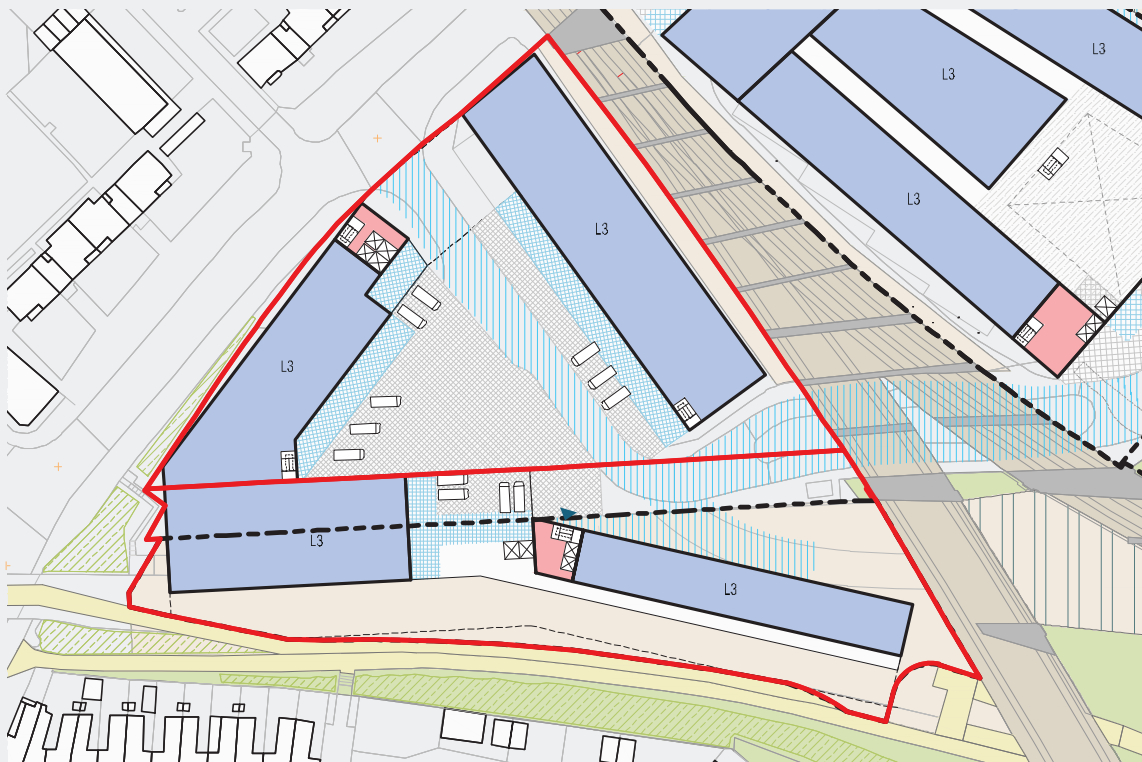
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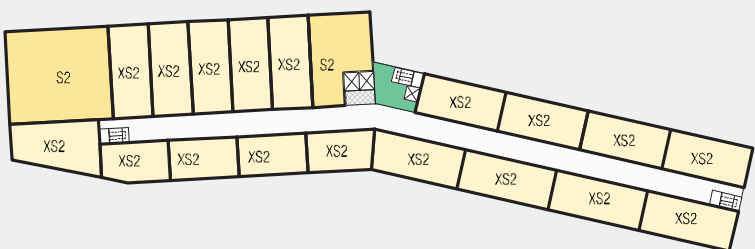


Upper Ground

Lower Ground

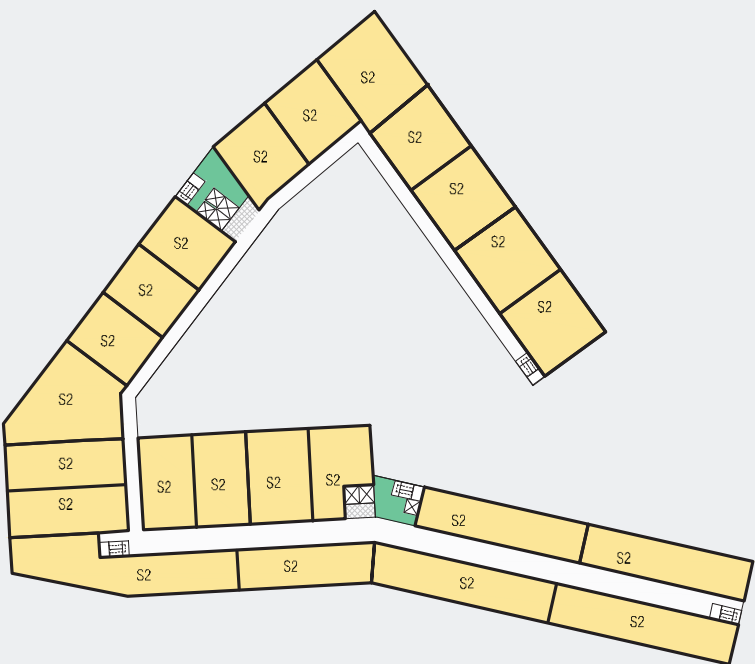


Level 3

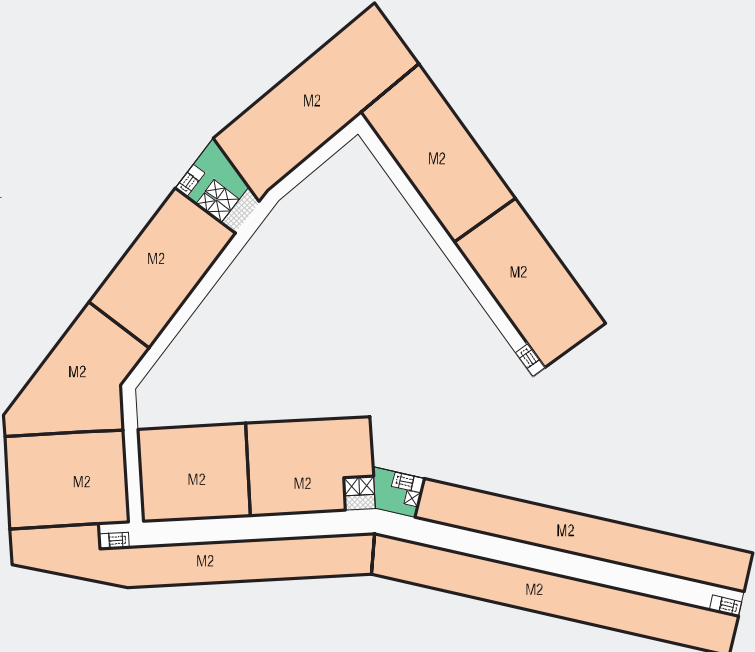


- Site Boundary
- - - Main Service Road
- - - Vehicular Access
- - - Visitor Access
- ▲ Building Access
- ● ● Cycling Links
- Operational yard
- Pedestrian areas
- XS
- S
- M
- L
- Reception
- Kitchen/ Toilets

Level 2



Level 1



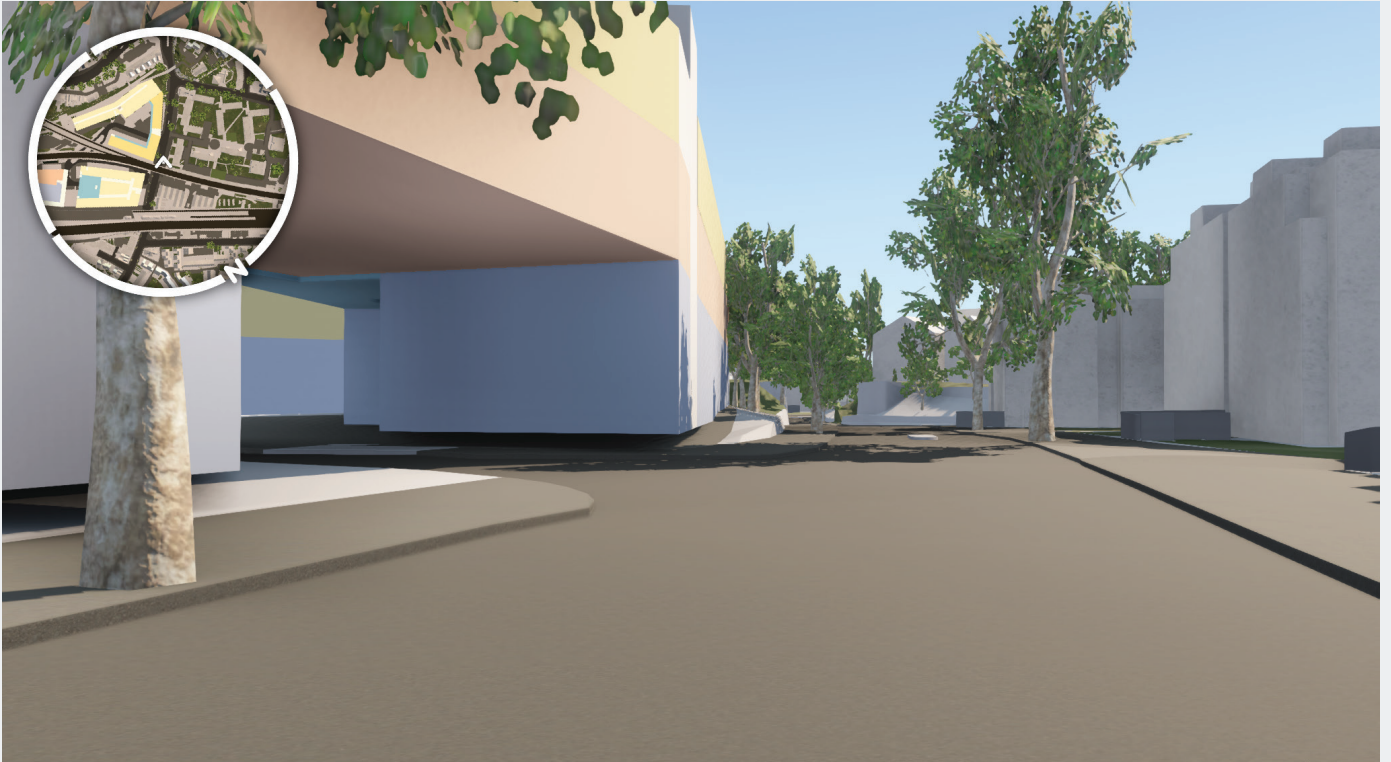
Site			Existing Condition				GIA (sqm) by						
	Area (Ha)	Proposed Floors	Footprint	Floor-space	Plot Coverage	Plot Ratio	XS 1	XS 2	XS 3	S 1	S 2	S 3	M 1
Site 1 + Site 4 (partially)	0.57	2	1,512	1,848	27%	32%	0	0	0	0	550	0	0
Site 1 + Site 4 (partially)	0.57	4	1,512	1,848	27%	32%	0	2,450	0	0	4,100	0	0
Site 4	0.65	2	1,792	2,329	27%	36%	0	0	0	0	0	0	0
Site 4	0.65	3	1,792	2,329	27%	36%	0	0	0	0	2,450	0	0
Minimum Total							0	0	0	0	550	0	0
Maximum Total							0	2,450	0	0	6,550	0	0

- XS1: B1C
- XS2: B1b, B1c
- XS3: B1C
- S1: B1C, B8
- S2: B1C
- S3: B1C
- M1: B1C, B2
- M2: B1b, B1c
- M3: B1c, B2, B8
- L1: B1c, B2
- L2: B2
- L3: B2, B8
- XL: B8

y Unit						Total						
M 2	M 3	L 1	L 2	L 3	XL 1	Units GIA (sqm)	Building GIA (sqm)	Building GEA (sqm)	Plot Coverage	Plot Ratio	Uplift %	Uplift GEA
3450	0	0	0	1,700	0	5,700	7,760	8,000	67%	140%	108%	6,152
3,450	0	0	0	1,700	0	11,700	15,181	15,650	67%	275%	243%	13,802
2,450	0	0	0	2,450	0	4,900	5,578	5,750	40%	88%	525%	3,421
2,450	0	0	0	2,450	0	7,350	8,536	8,800	40%	135%	99%	6,471
5,900	0	0	0	4,150	0	10,600	13,338	13,750				9,573
5,900	0	0	0	4,150	0	19,050	23,717	24,450				20,273







Rotherhithe New Road



Ilderton Road



Ilderton Road



Stubbs Drive



Rotherhithe New Road

APPENDIX

Jones Lang LaSalle Incorporated

*Feasibility study for potential
redevelopment of
**Bermondsey Dive Under,
Bermondsey, London SE16 3LL***

ON BEHALF OF

Southwark Council



Table of Contents

1	Introduction	3
2	Bermondsey Under-Dive Potential Redevelopment	4
3	JLL's London City Logistics Group	6
3.1	Our Credentials:	6
4	The Rationale for Higher Density Schemes.....	7
5	Types of Intensification for Industrial / Warehouse use	8
6	What type of development is suitable for Bermondsey Dive Under.....	13
7	Who will take this space?.....	14
8	Conclusions and Recommendations	16

1 Introduction

JLL have been invited to provide a feasibility report on the potential redevelopment of Bermondsey Dive Under for a high density industrial-based scheme in line with the Draft London Plan and Southwark Council 's Old Kent Road Area Action Plan / opportunity area planning framework consultation (December 2017). This feasibility will enable Maccreanor Lavington Architects to draw up a number of suitable schemes on the site.

This report provides the following:

- An explanation of the forms of high density industrial-based development currently being considered in London and their key characteristics
- A brief specification based on JLL's experience within this market and their recent fact-finding missions in both mainland Europe and SE Asia
- A critique as to the type of occupiers that would consider this space

2 Bermondsey Under-Dive Potential Redevelopment

Bermondsey Under – Dive until recently has been occupied by Network Rail who have recently vacated the site and recently purchased by The Arch Co. which provides at present a total of 2.1 acres (0.85 Ha) of open storage land and up to 40,000 sq ft of arches under the railway. Access to the land is via Jarrow Road and Bolina Road only, although previously Network Rail had access to the site through an agreement with the owner of Bermondsey Trading Estate which is now shut off by a welded fence. Jarrow Road is deemed the most suitable road for HGVs as it is accessed directly off Rotherhithe New Road where as Bolina Road has residential dwellings within it.

The site benefits from good public transport links either via bus from Rotherhithe New Road or train into Central London from South Bermondsey Station.

As a site it is split into two distinct areas, known as site 1 and site 2 which have net developable areas of approximately 0.42 Ha (1.03 acres) and 0.48 Ha (1.3 acres).

The site falls within the South Bermondsey sub section of the Old Kent Road AAP within the strategic Protected Industrial Land (SPIL) which totals 26Ha (64.2 acres), has 95 businesses within the sub area providing 1,606 jobs. This area is also deemed a suitable location for business to be relocated to from the Old Kent Road area.

Within the Old Kent Road AAP Bermondsey Under-Dive falls under policy AAP 6: Business Space and Workspace which strives to strengthen the vibrant business community of Old Kent Road and promote an innovative mix of uses that include light industrial, offices, manufacturing, distribution and creative spaces from laptops to forklifts. To achieve this Southwark Council will:

- Double the number of jobs from 10,000 - 20,000 by 2037
- Increase range of jobs by providing different types and sizes of employment space from laptops to forklifts including light industrial, maker space, warehousing and distribution, offices, workspaces, retail, leisure and entertainment facilities.
- Increase employment space for existing small and independent businesses; and
- Increase industrious workspace in developments along with housing, offices, shops using innovative design and solutions; and
- Work with local businesses and other partners to make sure our residents are trained and ready to access the many exciting job opportunities.

Development must:

- Retain and increase the amount of employment floor space (GIA) on site (B class use or sui generis employment generating uses); and
- Accommodate existing businesses on site or in the OKR opportunity area or provide relocation options for businesses that will be displaced by development; and
- Generate employment where non-residential floor space is required and result in an increase in the number of jobs provided; and
- Ensure that employment floor space is suitable to meet current demand and intended occupiers; and
- Deliver workspace managed by a specialist provided of office and light industrial uses to support existing and new businesses. The provider must be identified in the early stages of planning to ensure the space can be designed and tailored to specific needs; and

- Provide an element of affordable workspace on site that is either managed by a non-profit organisation or let to existing businesses from the Old Kent Road opportunity area. This should be secured for at least 30 years at rents an appropriate to the viability of business. If it is not possible to provide this quota on site a financial contribution will be required for off-site projects.

3 JLL's London City Logistics Group

3.1 Our Credentials:

JLL have recognised over the course of the last 3 years that there is a growing swell of enthusiasm within the landlord and developer arena for the promotion of higher density schemes. As such, and as JLL continually got approached on providing specialist advice on this growing sector, the London City Logistics Group was formed with the sole purpose of being able to provide advice with some authority and experience.

The experience thus far gathered include;

- Toured Singapore, Hong Kong and Shanghai inspecting a large number of both multi-storey ("ramped-up warehousing") and multi-level ("flatted factories") buildings
- Inspected SEGRO's Air 2 Gennevilliers (2-storey), Parc Du Crevecoeur, Innovespace in Paris, Gewerbehof LAIM and Gewerbehof Nord in Munich and Gewerbehof Hamburg (multi-level)
- Inspected Sogaris's co-location development at La Chapelle in Paris & Caxton Works in Canning Town
- Advised and let X2, Hatton Cross, Heathrow
- As such currently, the Team is advising on 18 of the 27 current known projects in London.

4 The Rationale for Higher Density Schemes

As has been well-documented over the last few years, London is undergoing a rapid change in many ways – lifestyles, business operations, shopping preferences, flexible working.

Many of these changes have been shaped by the changing environment within London, with some key factors being the main drivers:

Population on the increase: currently London has a population of 8.9 million people with an estimate that this will increase to 10.5 million by 2040.

House building: within the Draft London Plan, it is estimated that 66,000 new homes per annum until 2040 are required to keep pace with the increasing population

Population density: London's population density is c.5,700 people per sq km, which is one of the highest in Europe

Loss of industrial land: between 2001-2015 1,300 hectares of industrial land in London was lost to other uses (primarily residential)

Increasing consumer demand: population growth and the growth of e-commerce and demand from consumers to have anything anywhere is increasing the need for companies to be located in or close to cities.

Growth of e-commerce: in 2018 around 18% of total retail sales were online in the UK. Sales are forecast to grow to up 40% by 2030.

Government policy: the Draft London Plan, City of London planning policy, TFL's ultra low emission zones are all major significant factors in driving this new type of development.

Limited land leading to rental growth: prime headline light industrial rents have increased 65% over the last five years across the six locations JLL monitors in London.

Bringing these factors together, it is estimated that per household 41sq ft of e-commerce-related logistics space is required to satisfy demand, which equates to 2.7million sq ft of new logistic - based space required year on year to keep pace with housing starts until 2040 (according to the British Property Federation and the Draft London Plan).

5 Types of Intensification for Industrial / Warehouse use

This can be grouped into three main categories:

- Multi-storey (ramped access for vehicles to higher levels)
- Multi-level (all goods transported via good lifts from the ground floor)
- Co-location (either vertical or horizontal) whereby industrial / logistics space sits alongside or beneath other uses, primarily residential and retail.

The form of development is largely dictated by the shape of the site, it's immediate location (heights of surrounding buildings), ground conditions and immediate transport connectivity.

There would seem no one building type with many being a hybrid of each other with, in some cases, an element of ramped-up warehousing but with some cargo lifts.

Below, a brief description of the main building types is provided.

Multi-Storey "Ramped-up" Logistics space (Singapore)



Toll City, Singapore – 1 million sq ft on 6 levels



From the initial research undertaken, there is an entry point in terms of plot size and number of floors which will render a project viable. Whilst not completing prescriptive, with the ramp for a multi-level solution taking at least 40,000 sq ft of land for a two-way circular ramp and the need to at least build three floors, then circa 4 acres is the minimum to become financially viable.

Typically, the space can be accessed by vehicles up to HGV size to all floors, warehouse units having an internal height of a minimum of 6m clear (with many substantially higher), a floor loading of 25 – 30Kn/sqm, but with fairly minimal office contents set in defined areas within a scheme (suggesting more communal offices and welfare blocks).

Co-location



Section perspective.

Thameside West, Silvertown – Keystone



Travis Perkins, Kings Cross (UK)
PC 2011



Chapelle International (France)
PC 2018

Above are three differing examples of co-location proving that one size does not fit all.

Thameside West sits on a SIL site with the logistics / industrial space driven by a need to replace lost industrial with new, whilst maximising density with a podium arrangement with retail and extensive apartments above. The key factor here is demonstrating to the GLA and local authority that the uses can sit comfortably together with some sensitive design measures in place. The concrete podium and buffer zone allows delivery and manufacturing uses to operate beneath new housing.

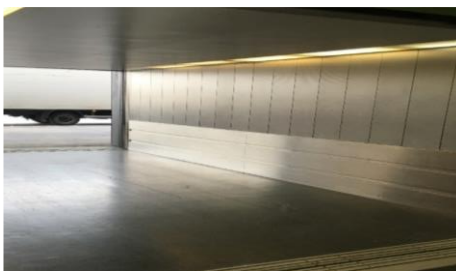
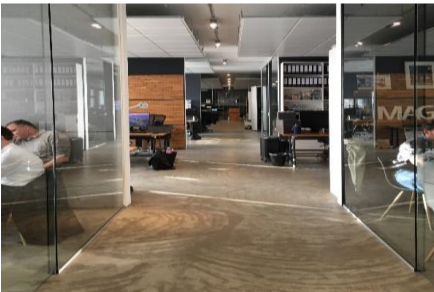
Travis Perkins, Kings Cross is the "classic" co-location example used to demonstrate how two differing uses can operate on the same site. Travis Perkins operate a full builders merchants to the ground floor with deliveries and customer visits throughout the day with a full student village above.

Chapelle International provides an example where a multitude of uses, normally not associated with each other, work in relative harmony with some sensitive design and operational criteria. There is a rail terminal (providing goods which are distributed via DPD as a consolidation arrangement), high-rise apartments, a data centre, workshops and basement cash and carry.

Multi-Level "flatted factory" (Singapore):



Multi-Level – modern version built in 2012 (Munich)



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MGH, a public / private venture have built two of these multi-level buildings in Munich, which whilst well-built and well-managed are essentially similar to the Singapore example. This example is fully let to a variety of occupiers who are involved in such businesses as R&D and testing for warehouse robotics, a vegan ice cream maker, a glass manufacturer and more “traditional” last mile logistics.

Proposed Multi-Level projects (London)

Whilst there is a number of development companies discussing building multi-level buildings at present there are only two live London-based projects. JLL have harnessed the experience of the Munich, Hamburg and Singapore buildings and redefined based on the London requirements.



The Generator, Park Royal – St George
PC expect 2021



Gillender Street, Bow – Prologis
PC Summer 2020

JLL is advising on both these project

The Generator: this is a direct result of dealing with the conundrum of maximising density on a small and difficult site with a number of site constraints – flood risk, sensitive boundaries, 2,900 new homes to be built to the rear, the need to reach a minimum lettable area whilst ensuring that the GLA and two local authorities are on board on such a project. It should be noted that the latter issue was never in doubt as all parties were very positive with the proposal and could identify the potential opportunity for new and existing businesses to be located within a cluster arrangement creating a fantastic show piece for future similar projects within the GLA.

Essentially the main elements of the building are:

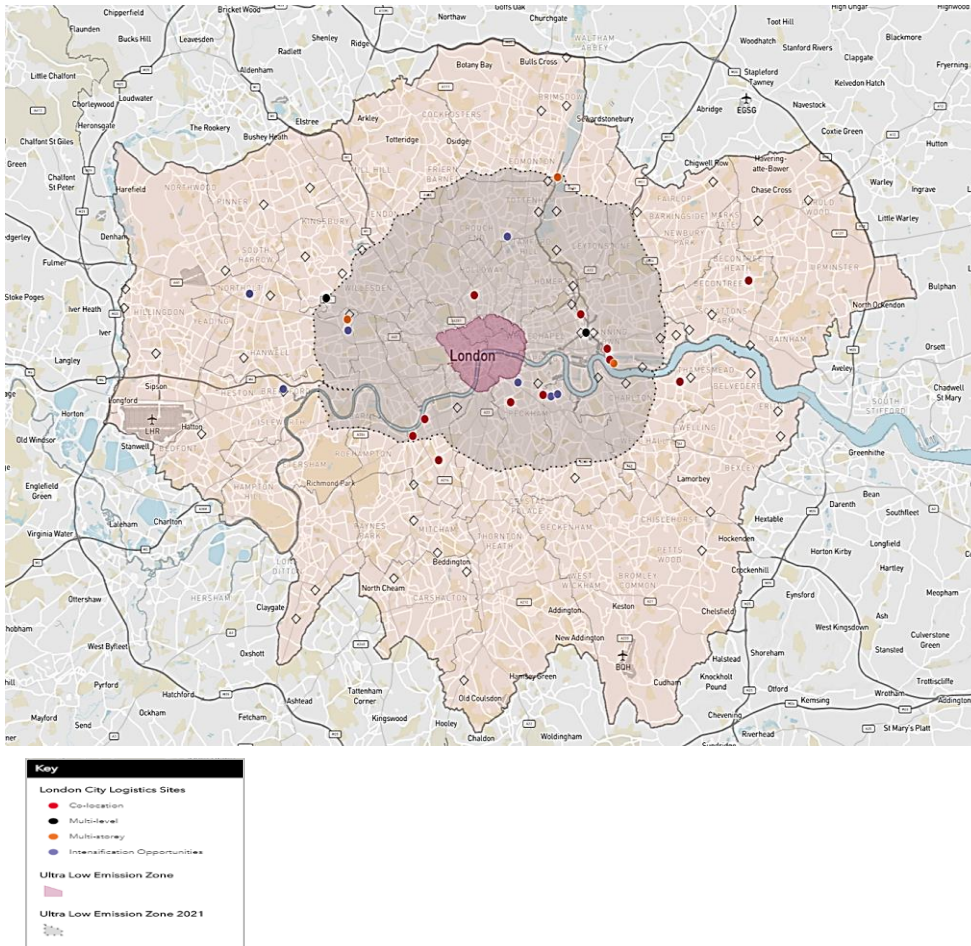
- 130,000 sq ft of building provided on 1.6 acres
- 2 floors of car parking (decked arrangement) / 4 floors of workshop / industrial / manufacturing space
- 1st and 2nd floors 5m clear; 3rd and 4th floors 4m clear
- Ability to let on a floor by floor basis or floors can be split in units from 3,000 sq ft upwards
- Secure yard capable of HGV servicing onto a loading / despatch plinth
- Access to all upper floors via 5 goods / cargo lifts (two capable of accepting a fully laden forklift)
- Separate staff lifts and staircases
- Communal WCs on all floors
- Café / Reception on ground floor
- Proposed onsite security and management team

Gillender Street: recently acquired by Prologis from Iron Mountain (who remain in occupation to end of Q3 2019) this space is due for a major overhaul and refurbishment providing a combination of ground floor logistics space for both the last mile logistics market, but also for the consolidation requirements that are now flowing through from the new office schemes being built in The City together with servicing mainstream retail outlets.

The focus is providing flexible space which can accommodate a multitude of users from traditional B8 users, through food manufacturing, industrial, design and R&D through to traditional office space, at the upper floors.

As is clear from the design there is a real emphasis on the wellness of the occupiers and their staff with gym, creche and café/restaurants set within a well thought out environment.

Finally, to put the activity into context, the map below shows the known schemes which are being considered, in for planning or in the case of The Generator, planning achieved. This demonstrates the momentum that is now driving these types of new development proposals.



6 What type of development is suitable for Bermondsey Dive Under

Due to the site sizes as highlighted in the typology above clearly a multi-level scheme for employment use is the most appropriate and in line with Southwark Council's objectives in the Old Kent Road AAP and intensification of land that the Mayor of London is seeking within the draft London Plan.

We would anticipate that each of the properties would accommodate warehouse type operators on the ground floor level with a variety of uses on the upper floors accessed by a number of cargo lifts, the number of which needs to be advised by a TRIP advisor but will be based on the number of floors and total floor area.

On the upper floors we would expect there to be good natural light throughout via windows on the exterior and internally where there is likely to be a central corridor via light wells.

Whilst the local area provides a good range of amenities from our extensive travels the importance of the wellbeing of the occupiers within the building, which also helps to retain tenants as well. To help with this we would recommend that balconies or break out areas are included in the plans.

For the ground floor we would anticipate a floor to ceiling height of circa 6m and circa 4m and floor loadings of between 10-15 Kn/m.

7 Who will take this space?

As can be surmised by the activity of some significant operators in the London market there is a growing feeling of optimism that this new type of space will generate good demand from a multitude of operators across all sectors.

Our experience in both Munich and Hamburg, where multi-level space is fully embraced with full occupancy and is becoming more the norm is further enhanced following a soft market testing which JLL undertook in Park Royal, which has an endless supply of SMEs across a wide spectrum of uses. The overwhelming feedback from the majority is that this space would definitely work and in many cases are keen to explore further. Of particular note is the film and media industries who recognised immediately the synergies of working so closely together.

It has to be stated that this type of space will not suit every use and indeed, there are examples where certain uses will not sit comfortably within this built environment – some food manufacturing, noisy or uses that create noxious fumes, operators who have a large fleet of vehicles, etc.

However, there is a significant group of operators within various sectors who would sit comfortably together, with many openly seeking to “cluster” - such as film and media, artists and designers, some food producers etc.

Whilst not exhaustive, below is a list of those key markets whom this type of multi-level space would work for them:

- Light assembly
- “dark kitchens” – e.g. Deliveroo
- R&D/prototyping
- Prop hire
- Film companies including camera/lighting equipment hire
- Media/publishing
- Digital printing companies
- Textiles
- High-end food companies e.g. artisan bakers
- Arts & crafts (a recent Future of London report estimated up to 30% of artist studios are being lost in London)
- Recording (sound proof) studios
- Photographic studios
- Fine Art Storage
- Last mile logistics
- E-tailers

If designed with a greater business community ethic and feel in mind, then many of the businesses above would consider this space, not just for the property fundamentals above, but identifying the potential for:

- Provision of cost-effective space for small businesses to locate in an inner London location
- Creation of a ready-made business community within which businesses can leverage off each other
- Promotion of a business within a high profile and statement building
- Allow a business to grow within the scheme, by offering flexibility of lease tenure such that occupiers can expand within the building or move elsewhere within the area
- Good accessing 24/7 hour

To provide some context to this section, JLL has undertaken some research into the current requirements in the immediate markets that conceivably would consider such space as we would anticipate is suitable at Bermondsey Dive-Under.

- Events Production Space – 3-7,500 sq ft
- Photography Studio – 2-4,000 sq ft
- Florist warehousing – 1,500-3,000 sq ft
- Kitchen Space Provider – 5,000-10,000 sq ft
- Home décor design and production 3-7,000 sq ft
- Fruit smoothie producer 2-4,000 sq ft
- Digital signage 3-7,000 sq ft
- Events production 6-8,000 sq ft
- Creative card production 5-10,000 sq ft
- Film production 1-5,000 sq ft
- Artists studio 5-10,000 sq ft
- Photography studio 6-10,000 sq ft
- Recording studio – 3-10,000 sq ft

What is apparent that many fall within the sectors outlined above and could operate within a multi-level building with a number clearly benefitting from clustering or collaborating – e.g. photography, events organisers, digital design.

8 Conclusions and Recommendations

The tone and information in the report provided has demonstrated the potential for this proposed development form not only within the immediate area, but as response to the prevailing and sustainable market conditions across Inner London.

Bermondsey Dive-Under is strategically well located and will be recognised by local and regional occupiers as a key location to move to. The site lends itself to intensification making it attractive not only to existing businesses in the borough that need to relocate but new businesses helping to achieve the objectives set out in AAP 6.

Clearly the most important factor is whether a multi-level building will be well received and of attraction to a sufficient proportion of the market. The overwhelming indication from the experience that JLL have gleaned over the last 12 months is that occupiers are seeking new ways of working, are keen to locate close to business that they have synergy with and recognise the need to be very close to their customer base.



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