

ECOWORLD & POPLAR HARCA ABERFELDY MASTERPLAN & PHASE A COMMERCIAL STRATEGY REPORT

AUGUST 2022



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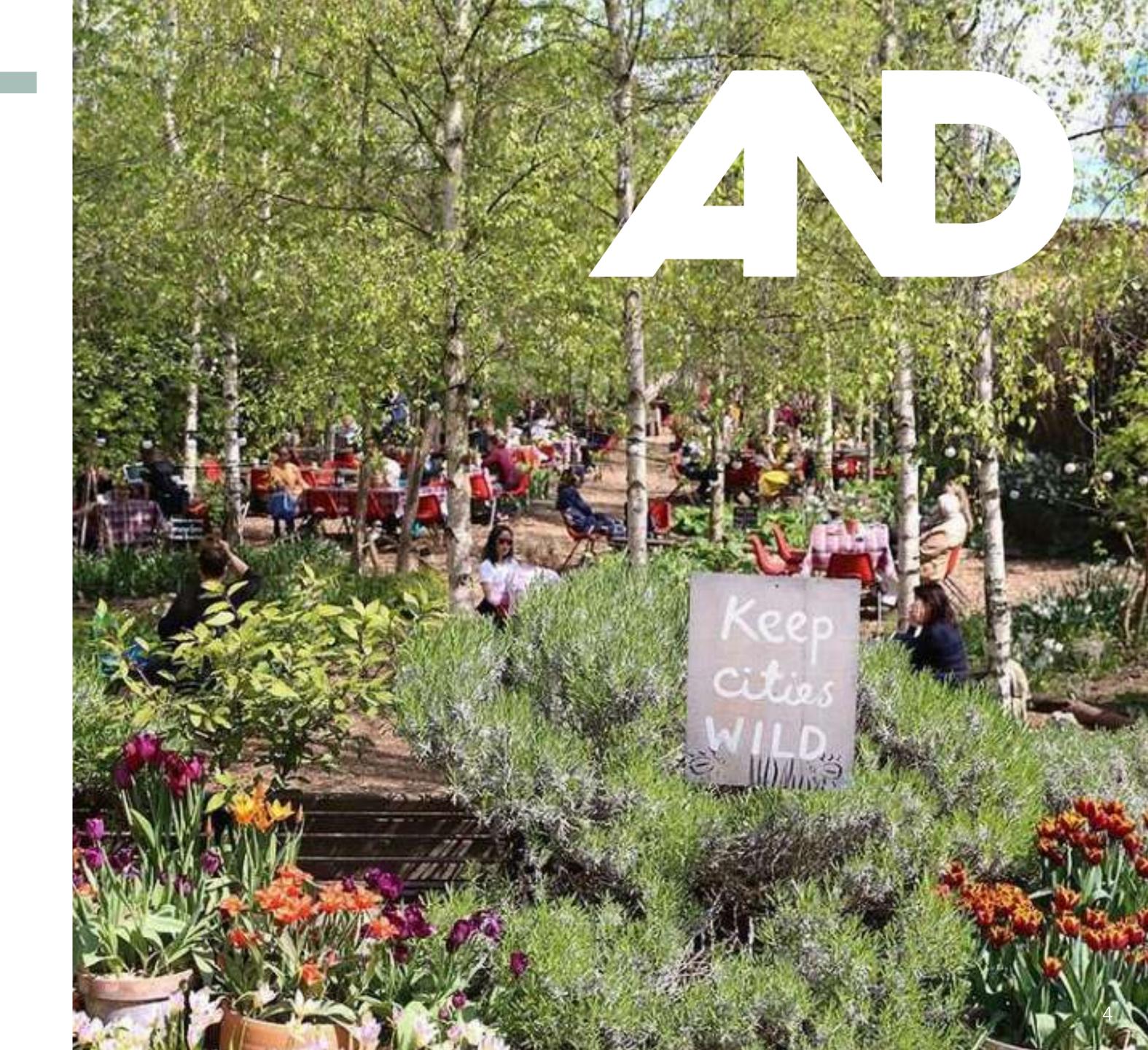
1. ABOUTAND

WENURTURE COMMUNITY

WE CREATE PLACES THAT SURPRISE AND DELIGHT

WETRANSFORM PLACES

WE CREATE ASPIRATION



ABOUTAND

AND was formed by Andrew Sissons upon leaving Hackney Council in 2015. At Hackney, Andrew headed up the Council's multi-award winning Regeneration Team and was responsible for a range of high profile projects including Tech City, Ways into Work, Hackney Fashion Hub, the Shoreditch Hotel cluster and the management of key Town Centre and business districts including Shoreditch, Stoke Newington, Dalston, Hackney Wick and Hackney Central.

Since leaving Hackney, Andrew has worked on array of economic clusters such as Tile Yard music studios campus in Kings Cross, the Vulcan Wharf brewing and cycling cluster and Intensifying Barking industrial.

AND work with many major developers, housing associations and local authorities to provide a full service property and place consultancy.

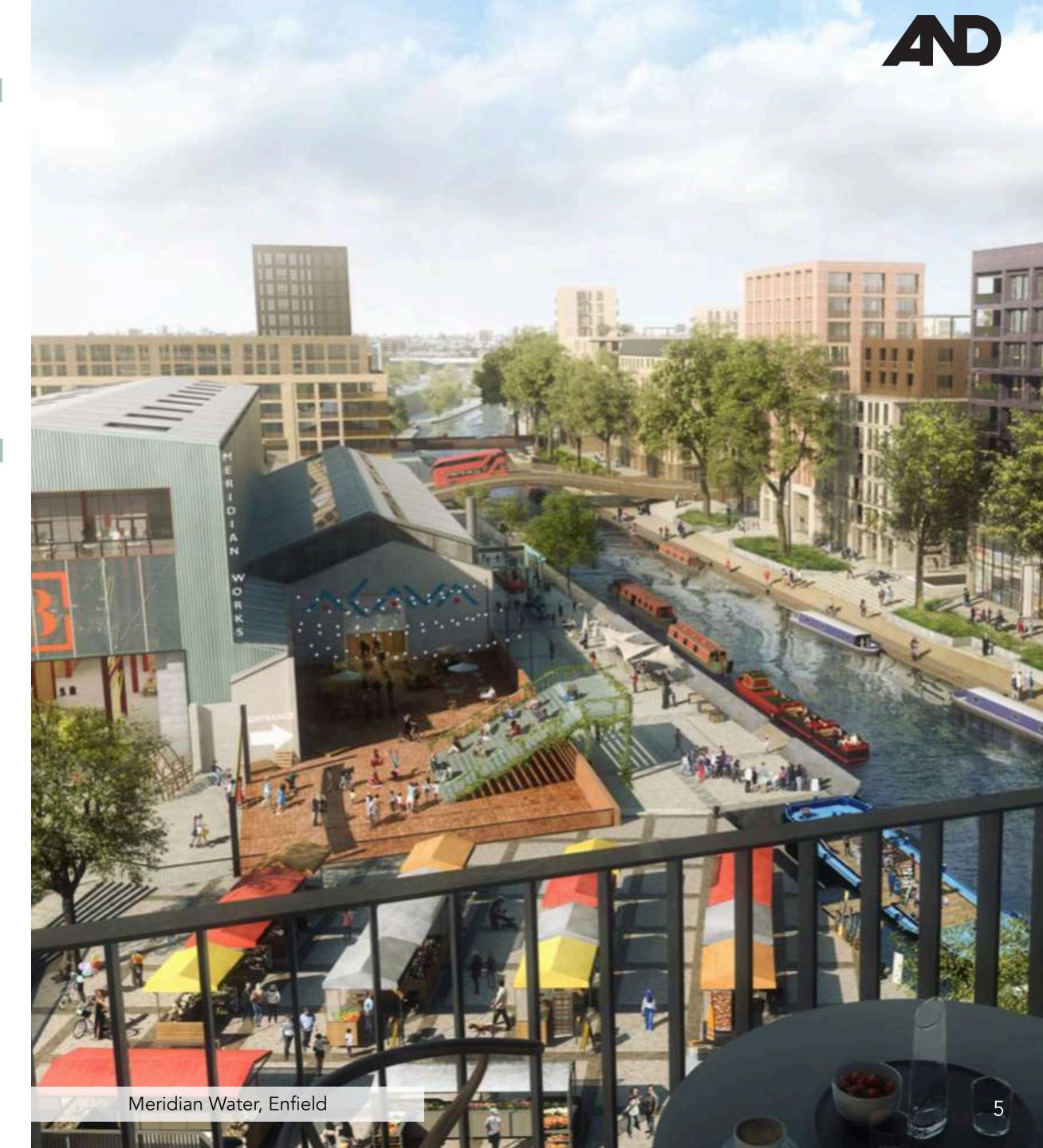
Our team has now grown to nine people from a variety of key sectors. The team were selected to cover a wide range of skills and expertise including regeneration, commercial leasing, planning policy and strategy, insight and research, branding and marketing.

authorities producing employment land studies. We are working closely with Boroughs such as Enfield, Barking & Dagenham and Waltham Forest, helping to devise innovative solutions for employment land along with policy and analysis for local plans, regeneration strategies and socio-economic strategies.

We are very influential in our East London heartlands and have great officer and political connections, as well as wider key stakeholders in these Boroughs. AND has a particular specialism in producing commercial strategies, providing planning advice for former industrial estates and leading on the transformation of estates from pure in dustrial to mixed-use developments.

At the present point in time AND is leading on approximately 8 million sq ft of new commercial space across London.

We are closely aligned with London's creative, tech and maker communities and involved in many influential leasing deals which help to create a sense of place. These include breweries, fashion houses, furniture makers, restaurants, cafés and bars. AND work closely with these industries and will always find great occupiers that will improve a scheme.



2. THE SCHEME

THESCHEME

This report is an update to the previously submitted version that was submitted to the Council in support of the hybrid planning application. This updated version has been prepared in response to the changes to the planning application boundary as explained in the covering letter to accompany the amendments to the Proposed Development.

This Commercial Strategy Report has been prepared by AND London and is submitted in support of a hybrid planning application for the Aberfeldy Village Masterplan. The hybrid planning application is made in relation to the north of East India Dock Road (A13), east of the Blackwall Tunnel Northern Approach Road (A12) and to the south west of Abbot Road (the "Site") on behalf of The Aberfeldy New Village LLP' ("The Applicant"). The hybrid planning application is formed of detailed development proposals in respect of Phase A for which no matters are reserved ("Detailed Proposals"), and outline development proposals for the remainder of the Site, with all matters reserved ("Outline Proposals"). The Detailed Proposals and Outline Proposals together are referred to as the "Proposed Development".

The Proposed Development comprises the comprehensive redevelopment of the Site. The Proposed Development will provide new retail and workspace floorspace along with residential dwellings and the pedestrianisation of the A12 Abbott Road vehicular underpass to create a new east to west route. The Development will also provide significant, high quality public realm, including a new Town Square, a new High Street and a public park.

Extant Outline Planning Application

Outline Permission rf: PA/11/02716/P0 (granted June 2012): What has been delivered to date:

- Phases 1 and 2 built out, with Phase 3 under construction
- 901 new homes
- 29% affordable homes by habitable room or 9.18% affordable homes by habitable room on the uplift
- New larger Community Centre with improved facilities
- Larger modern Health Centre
- New retail floorspace
- New energy centre
- New and enhanced high quality open space including play-space and a linear park
- Heights: 2 to 10 storeys
- Parking ratio: 0.2 spaces

Format of the Planning Application

Hybrid planning application with a detailed first phase referred to as the "Detailed Proposals" and a further three phases to be submitted in outline and referred to as the "Outline Proposals".



THESCHEME

Description of development

Hybrid application seeking detailed planning permission for Phase A and outline planning permission for future phases, comprising: Outline planning permission (all matters reserved) for the demolition of all existing structures and redevelopment to include a number of buildings (up to 100m AOD) and up to 141,014.4sqm (GEA) of floorspace comprising the following mix of uses:

Residential (Class C3);

Retail, workspace, food and drink uses (Class E);

Car and cycle parking;

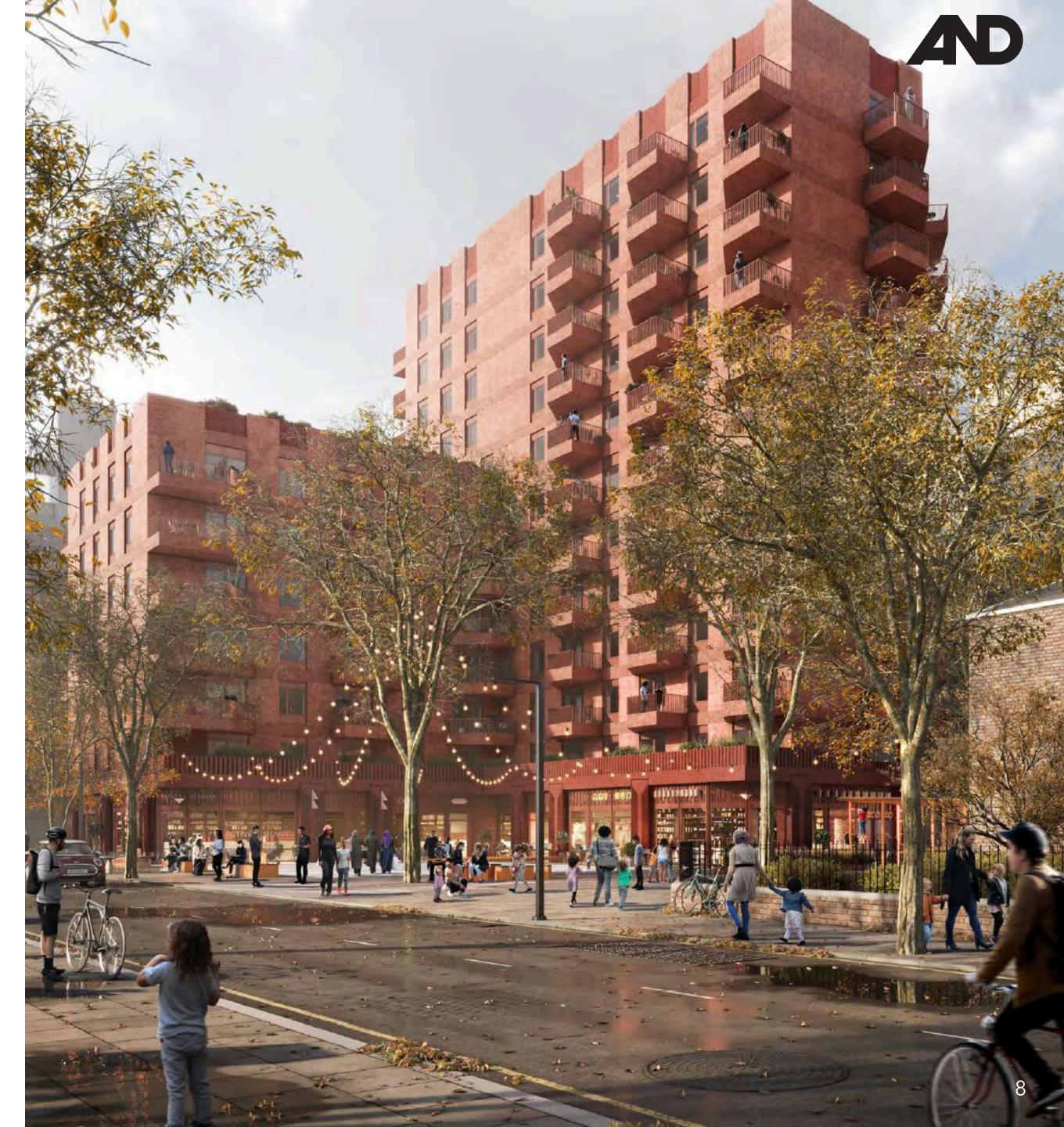
Formation of new pedestrian route through the conversion of the existing vehicular underpass;

Landscaping including open spaces and public realm; and

New means of access, associated infrastructure and highways works.

In Full, for residential (Class C3), retail, food and drink uses and a temporary marketing suite (Class E and Sui Generis), together with access, car and cycle parking, associated landscaping and new public realm, and private open space.

		Propose	d Floor Areas		
Use	Use Class	Phase B GEA (sqm)	Phase C GEA (sqm)	Phase D GEA (sqm)	Maximum GEA Cap by Use (sqm)
Retail	Е	395	-	849	1,244
Workspace	Е	1,026	2,174	-	3,200
Residential	C3	57,607	56,833	19,531	133,971
Podium Parking	C3	712	1,887	-	2,599
Maximum GEA Cap per Zone (sqm)	-	59,740	60,894	20,380	-
Total Maximum GEA Cap (sqm)			141,0	014	



3. EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

The Aberfeldy Village Masterplan and Phase A planning application sets the wider commercial strategy for the scheme, detailing the quantum and types of commercial space that will be essential to build a sustainable community. This includes a mix of different uses and functions that will help to create a great place and ensure the ground floor and commercial areas of the scheme are active and viable.

The scheme will deliver a mix of retail and workspace. Alongside this document we have authored the Retail Impact Assessment, which assesses the proposed quantum of retail space across the scheme and details how it will support the wider provision. This commercial strategy document details the retail approach for Phase A. The Phase A application is critical for the wider placemaking of Aberfeldy Village, providing the new High Street and civic square which will be important to residents, workers and visitors alike.

Aberfeldy is an emerging area as a business destination. The nearby Republic scheme has attracted an array of tech and creative businesses, and the Poplar Works scheme has brought start-up fashion and design businesses to the area. Both of these developments have provided great foundations to build on.

AND London have worked closely with the design team and The Applicant to create a commercial narrative that will build on the existing developments that have come forward in the area. It is clear from our research that the strategy should focus on provision for small businesses, predominantly within three key sectors:

- Start-ups
- Creative and Cultural
- Servicing the City and Canary Wharf

The majority of the Borough's business community is small business, with over 88% of the businesses being 1 to 9 people in size. The design has focused on creating flexible commercial space that meets the needs of these types of business. In Chapters 7 and 8 of this report we have tried to add some colour to the plans by detailing the types of space requirements and some examples of likely occupiers.

As the scheme will essentially become a hub for smaller businesses, we have focused on advising The Applicant and the design team on the type of offer these businesses will want, particularly as to how the scheme is offered to market in terms of fit out specification, marketing and leasing.

4. TOWER HAMLETS COMMERCIAL MARKET OVERVIEW

TOWER HAMLETS COMMERCIAL MARKET OVERVIEW

Tower Hamlets has a dynamic business community which includes a variety of different sectors and industries spread across the Borough.

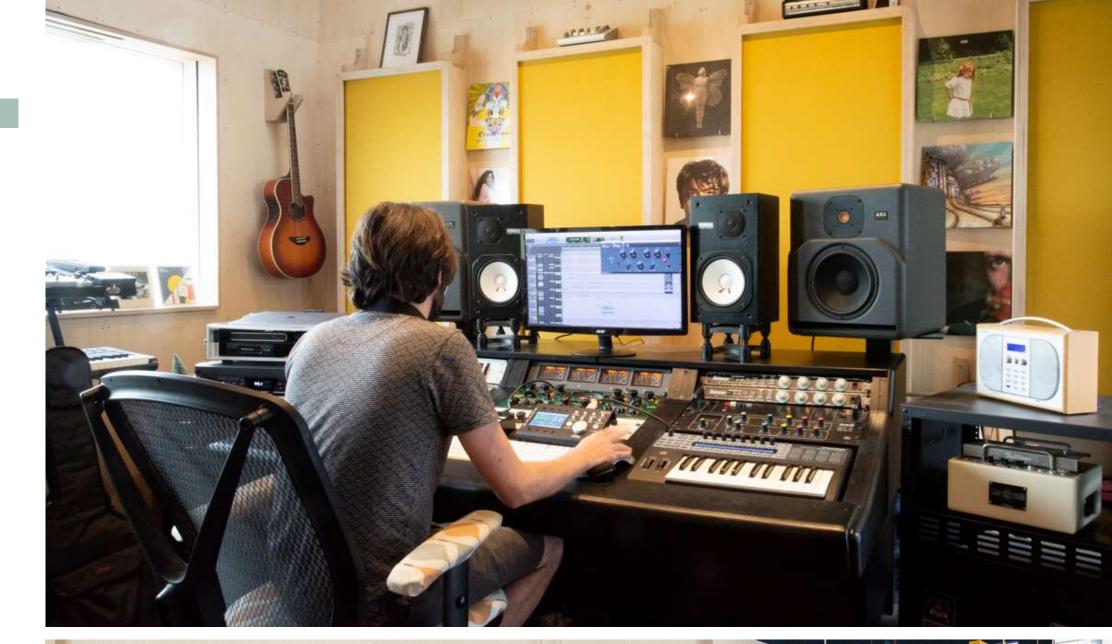
There are four world-class commercial clusters in terms of banking and professional services in Canary Wharf and the creative industries located around Brick Lane, Whitechapel and Hackney Wick. The Borough is also renowned as an artistic location, with many artists located in the areas surrounding Aberfeldy Village, particularly in Bow and Hackney Wick which are major hotspots for the UK's artistic community.

The Borough has great strength in a number of business sectors, with certain clusters being world-class including:

- Banking and FinTech
- Tech and Knowledge
- Creative Industries
- Professional Services
- Cultural Industries

The Borough's industrial base has diminished in recent years, predominantly due to the repurposing of industrial buildings as creative spaces and the redevelopment of industrial estates and Victorian warehouses into new housing. It is expected that the Borough's industrial estates will change in the near future, maintaining industrial floorspace but utilising space and massing in a much more creative way to enable intensified development that is more mixed-use by nature.

The Borough also has a good inventory of exciting warehouse conversions in Brick Lane and Hackney Wick, through to more affordable spaces such as the new Poplar Works facilities. Despite industrial decline Tower Hamlets is still the biggest of the eight inner London industrial submarkets, containing around 7 million sq ft of industrial stock. Tower Hamlets is one of the strongest performers in terms of industrial rent levels, with rents achieving between £16-£22.50 per sq ft on average, depending on location.





TOWER HAMLETS COMMERCIAL MARKET OVERVIEW

The Borough's office stock is very high quality and fit for purpose, particularly in terms of high quality 4 and 5 star stock. It has very good supply levels in a variety of price points and quality, from corporate Grade A space in Canary Wharf to semi-corporate locations such as Republic, Thomas More Square and St Katherine Docks, which have created new business destinations and provide HQ's for a range of creative and corporate businesses. The Borough also has a good inventory of unique warehouse conversions in Brick Lane and Hackney Wick, through to more affordable spaces such as the new Poplar Works facilities.

The Borough has an array of quality restaurants, cafes, retail, leisure and cultural facilities at Canary Wharf and another significant cluster around Brick Lane, Spitalfields and Shoreditch.

Hackney Wick is also becoming a major leisure destination with a variety of different bars, clubs, restaurants and art galleries.

The Borough's business count is very strong with a broad range of businesses in terms of size, with a high proportion of micro businesses through to large businesses. This demonstrates a healthy economy that is diverse and sustainable, ranging from start-ups in Hackney Wick, to tech and creative businesses in Brick Lane, through to global bank HQ's in Canary Wharf.

New business births in the Borough remain strong, which demonstrates a strong entrepreneurial spirit and a place that is creating business opportunities. The majority of businesses in the Borough are micro businesses of 1 to 9 people, and the Local Plan describes a shortage of small micro workspace.

The Borough is one of London's most diverse areas and includes an array of small business communities that have emerged in locations such as Whitechapel and Bethnal Green, which provide services and meet specific cultural demands of the local ethnic communities. The Poplar area is rapidly becoming an important focus of the Borough's regeneration efforts, with several major schemes underway. Republic is becoming a key commercial destination for the creative industries in the area, and is home to businesses such as Deliveroo, The Trampery and Vodafone.

The Poplar Works scheme run by The Trampery and Poplar HARCA has created new commercial space for start-up's in the fashion and design sector. It has created a new market that will become a dynamic ecosystem and help to build the popularity of the area as a business cluster.

East London Industrial & Maker Market Demand

Take up in the East London market has been held back by supply shortages over the past four years, but the past 6 - 9 months have seen an increase in space on the market.

Supply moved up to 1.8m sq ft in Q2 2020, the highest level recorded since 2014/15.

Grade A supply has been boosted by the completion of a number of new schemes, standing at 426,900 sq ft at the end of Q2 2020. The two largest units are the 70,558 sq ft Unit 2 at SEGRO Park, Rainham and the 55,670 sq ft Unit 16 at Thames Gateway Park, Dagenham.

Several 'Big Box' units have come to the market in the early part of 2020. The Logic 233 (232,965 sq ft) at Hindmans Way, Dagenham is the largest building, whilst the 118,780 sq ft unit at 33 Thames Road, Barking and the 107,680 sq ft Welbeck Wharf, Barking also came back to the market.

Prime rents have remained stable at £18.50 per sq ft over the past two years following the sharp upturn in 2017/18. Rents in Canning Town have increased by 15.6% (2.9% per annum) over the past five years. Schemes including General Projects Express Way and Caxton Works reporting high occupancy levels.

Secondary rental values stabilised at £16.00 per sq ft in Q2 2020 as levels of uncertainty hit the market following the on-set of Covid-19. The growth in secondary rents has outpaced prime values, rising by 28.0% (5.1% per annum) over the five years.

5. OVERARCHING COMMERCIAL VISION & STRATEGY

- Building A1: Studio / Workspace
- 2 Buildings B1/B2: Studio / Workspace
- Building B3: Resident Hub / Micro Work Space
- 4 Buildings C1/C4: Micro Work Space
- 5 Buildings D1/D2/D3: The High Street
- 6 Buildings E1/E3: Studio / Workspace
- 7 Buildings H1/H2/H3: Retail / High Street







Phase	Building	Workspace	Retail	TOTAL
	F	0	253	10122
	Н	0	1088	13013
Phase A		0	0	5456
18.7%	J	0	0	3200
	TOTAL	0	1341	31791
	Percentage of Phase	0.0%	4.2%	
	A1	0	0	0
	A2	0	0	0
	A3	0	0	0
	B1	0	0	0
Phase B	B2	0	0	0
34.7%	B3	0	395.4	1953
	B4	0	0	0
	B5	0	0	0
	TOTAL	1025.6	395.4	59028.1346
	Percentage of Phase	1.7%	0.7%	
Phase C 34.7%	C1	0	0	0
	C2	0	0	0
	C3	0	0	0
	C4	0	0	0
	C5	0	0	0
	C6	0	0	0
	E1	0	0	0
	E2	0	0	0
	E3	0	0	0
	TOTAL	2173.8	0	59006.7173
	Percentage of Phase	3.7%	0.0%	
	D1	0	469.9	469.9
	D2	0	0	0
Phase D	D3	0	379.4	379.4
12.0%	D4	0	0	0
	TOTAL	0	849.3	20380.5138
	Percentage of Phase	0.0%	4.2%	
	Sub total	0		
	TOTAL	3199.4	2585.7	170206.4



OVERARCHING COMMERCIAL VISION & STRATEGY

Aberfeldy Village is at the start of its journey to become an established business location, and whilst the immediate area has traditionally been residential with some outlying industrial locations, new commercial buildings are beginning to emerge. A key focus of the vision and strategy is to build on the commercial narrative and start to tell the story of Aberfeldy as a new business destination, particularly to small and start-up businesses that are looking for a new home in an exciting and affordable location.

The area surrounding Aberfeldy does have green shoots of commercial activity. The Republic development attracting some interesting businesses from London's creative and tech economy, and Poplar Works is starting to become an important new business location for London's fashion industry, along with creative start-up's and freelancers. This will help with the narrative building and create confidence within the occupier market that a new commercial ecosystem is emerging in the area.

The area may also benefit from a bounce in terms of businesses looking to relocate out of the City Fringe and away from locations such as Hackney, to take advantage of lower rents. London and East London fringe in particular are seeing an increase in demand for good quality maker space. Many businesses will need to relocate from industrial and warehouse sites that are being redeveloped across the sub region over the course of the next two years, with many wanting to remain in the area but in new build fit for purpose spaces.

Therefore, the vision and narrative for Aberfeldy Village is around creating a small business and start-up cluster particularly within the maker, creative, cultural and broader start-up scene, and building on the placemaking pillar 'Creatively Made'.

The critical factors to make the area attractive to occupiers will be affordability, fit out specification, unit size and configuration. Other key parts of the narrative will include promoting the development of a local ecosystem and the necessary infrastructure to attract new businesses. This will include an interesting line up of retail and F & B spaces, as these will be particularly important to the type of businesses that we expect to locate to Aberfeldy.

Flexible Commercial Units

The commercial units marked as 1, 2 and 6 (Buildings A1, B1/B2 and E1/E3) and on the site plan map are ideal as office, studios or maker spaces. It is our view that the spaces will be leased by small businesses that require larger spaces, along with small businesses that are more established. It will be critical that these units are designed with flexibility to accommodate a range of different commercial uses.

Office / Studio Space

For office and studio space we anticipate potential occupiers will be small businesses that service the City and Canary Wharf, and small creative businesses that are looking for good value, flexible commercial space.

We do not anticipate major demand for co-working spaces at the present point in time, but this should continue to be monitored as the development takes shape. Co-working operators tend to require a minimum of 10,000 sq ft to make them financially viable.

Office / Studio Space - Design Requirements

Floor to ceiling heights should be around 4 meters for office and studio space.

The ability for natural ventilation where possible with openable windows is increasingly becoming important for occupiers, as sustainability of buildings becomes a key requirement.

Double entrance doors will make the units much more flexible and usable for a range of different types of potential occupiers.

The space should have good natural light and be fitted out to a mix of white box and enhanced shell and core. We recommend a 50 / 50 split between both fit out categories to provide a range of opportunities for potential occupiers.



OVERARCHING COMMERCIAL VISION & STRATEGY

Maker Space

We are seeing an increased demand for maker space in East London, and there is a good mix of new space coming to the market which is well designed and proving very popular with occupiers.

These types of occupiers are keen to be located in mixed tenure schemes in urban locations. The businesses want to be a part of a dynamic new ecosystem which supports a cluster of companies from a variety of different sectors.

Maker Space - Design Requirements

The spaces should be designed with a minimum of 4 meter floor to ceiling heights, and should accommodate some spaces that can potentially incorporate a mezzanine area which will require a minimum of 5.27 meters floor to ceiling heights.

If mezzanine areas are incorporated and built into spaces, it should be for no more than 30% coverage of the floor area and preferably located towards the back of the unit.

There is strong local demand, particularly from micro businesses who are looking for spaces of around 50 - 150 sqm in size. The space can initially remain flexible, and should be designed to be split down into various sizes to meet local occupier demand at the point of completion.

A key requirement will be double entrance doors to each unit and good natural light where possible.

Glass floor to ceiling is not recommended and facades and frontages should have a robust industrial look and feel. A plinth to waist height is recommended and opportunities for signage and supergraphics should also be incorporated on facades.

Access for deliveries will be critical, along with commercial yards where they can be accommodated.

Micro Workspace

It is our view that the buildings marked 3 and 4 (Building B3 and C1/C4) on the scheme map are ideally suited for micro workspace, with units starting at 15 sqm for early stage businesses and freelancers. The space could be offered at:

- 15 sqm
- 25 sqm
- 40 sqm
- 50 sqm.

Over the last year we have seen a trend of small businesses moving away from co-working and other forms of shared workspace, and instead seeking small micro workspace units that enable them to have their own front door.

Despite businesses wanting private individual space, they still want to be part of a business community with shared facilities such as meeting rooms, courtyards and cafés / bars and want to be part of a community with lots of other similar businesses located in the area.

In many of the locations our research has found that the smaller units in schemes are the first to be leased, and normally have the highest level of occupancy. For the type of occupier leasing these spaces price point is critical, and these need to be leased ready for occupation to a plug and play specification. It should also be noted that 88% of Tower Hamlets business community is made up of micro businesses that are 1 to 9 people in size. It is an entrepreneurial, small business community and one that needs accessible commercial space.

Micro Workspace - Design Requirements

These units should start at 15 sqm in size in a range of increments through to 50 sqm in size.

The units should preferably be 3 - 4 meters floor to ceiling height, with good natural light and have shared welfare facilities for bathrooms, showers, kitchen points and if possible shared meeting room facilities and breakout areas. It is recommended that the units should be fitted out to a plug and play standard.

ENTERPRISE YARD

Enterprise Yard is the centrepiece of the commercial offer providing xxxx sq ft of commercial space, with a mix of light industrial, maker and studio space designed specifically London's creative, cultural and maker communities.

Enterprise Yard will be a multi-level commercial facility centred around a commercial yard space that will be a shared space for businesses, visitors and residents.

The scheme is designed to enable passersby to view the various commercial spaces; creating a shop window for the businesses that are making and producing. The scheme has been designed to create an atmospheric location with a real focus on creating robust industrial facades with great natural light.

The Yard will create an important hub for East London's maker community, who have recently been dispersed due to extensive development. It will now provide a hub to enable this important sector of London's business community to build a long term base.

The scheme located adjacent to the A12, and is ideally positioned for maker and light industrial businesses that need fast and effective transport links.





PHASE A – DETAILED PLANNING APPLICATION

The Detailed Planning Application for Phase A of the scheme focuses on two of the key retail areas for the scheme - plots F and H. This includes the proposed new High Street and the new square, which will provide circa 1,195 sqm of retail space.

The provision of high quality fit for purpose retail space will be critical to the future success of the commercial space, along with creating the right placemaking principles that will make the scheme an attractive location for the residents, businesses and workers that will locate to the area.

AND London, as part of our commission, also undertook the work on the Retail Impact Assessment for the Masterplan and Phase A. The document, which is part of the suite of documents in this submission, should be read in conjunction with this strategy. It provides a detailed justification as to why the proposed quantum of space is highly considered and appropriate for the development, based on the proposed level of new residents within the vicinity of the scheme.

The proposed amount of new workspace, the level of workers and the anticipated spending power of the future local community is based on CACI projections for local spend across all retail sectors.

The design of the new retail spaces has been carefully considered over a number of months in weekly project meetings between the design team, AND London and The Applicant.

The aim was to create a set of proposals that would be attractive to retailers and focuses on their space, design and fit out requirements.

The key focus was to build a picture of the likely type of end occupier and understand their requirements and demands, based on our leasing experience in similar locations. It was quickly established that the location would not be right for national chains, and that the focus should be on independent retailers looking for up and coming areas and a place that offers the vision of a high quality new High Street.

The design process then centred on creating a High Street that met the needs of all residents, by creating space that was accessible and flexible for a wide range of different potential occupiers. The units range from circa 25 sqm on the High Street, and can be joined together if businesses want larger spaces.

These units will focus on F & B and cultural uses to activate the Square, and create a reason for people to visit and a sense of community.

The units have been sized to accommodate a range of F & B requirements based on expected market demand. The units have also been designed with suitable flexibility to accommodate other retail uses and retain the ability to be split down in size further if this is essential to leasing.

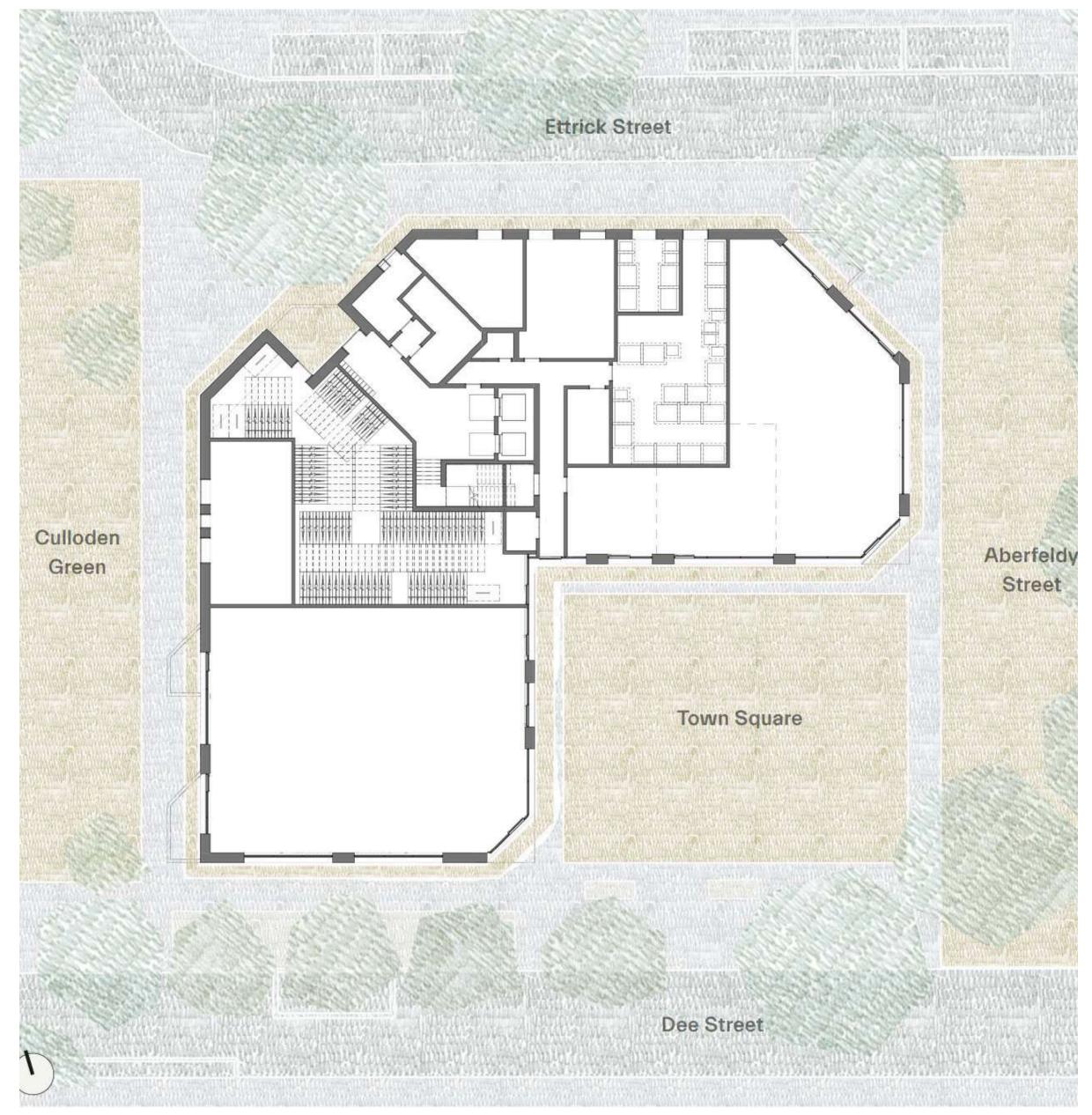
A further key element of the design process was to focus on creating a retail environment with real character. and exploring design solutions that examined how we could provide a solution that meant not just providing the standard glass boxes that is the current vogue for ground floors of developments. The process focused on creating a vibrant design that would encourage a genuine sense of place, local ownership and a destination that people would want to visit and dwell in.

Leasing across all Commercial Tenures

We do not anticipate that Aberfeldy Village will become a location for large businesses or national chains. We expect the focus will be on very small businesses that will not necessarily have strong financial covenants and they are likely to have limited funds and financial history. It will be important to take this into consideration and to help these businesses by making it accessible for them to lease space. This will include taking into account how the business is funded, recent rental history and ability to pay a rent deposit.

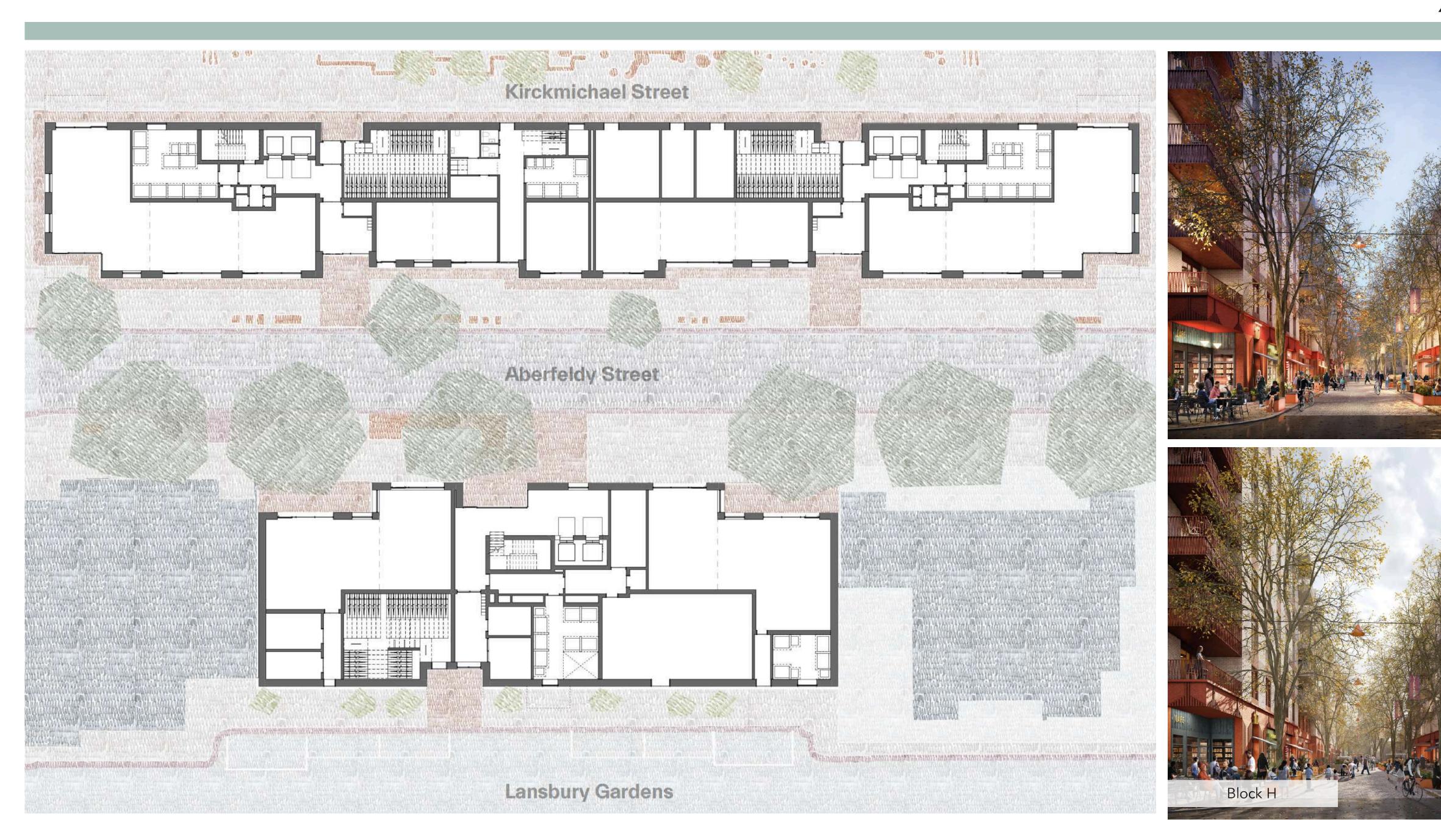
The ability to have flexible leases that enable businesses to easily move between different sized spaces will also be popular, particularly for start-ups and seasonal businesses.













6. LEASING STRATEGY



LEASING STRATEGY

The scheme will need a reasonable level of investment in marketing, along with the creation of a commercial narrative that strongly communicates the offer and talks about the future of Aberfeldy Village as a business and retail location. It cannot be a case of just putting up agency boards and waiting for tenants to turn up - this scheme will require a very pro-active approach through directly approaching businesses about the opportunity as well.

We will produce a multifaceted letting strategy to promote the development using both traditional and innovative marketing tactics. This will include the production of particulars both online and in printed formats, alongside event-based activations to generate interest. We will also use social media channels and direct targeting of potential tenants.

We will also identify and approach key local business stakeholders such as:

- Local business forums and associations
- Chamber of Commerce
- Local Council Inward Investment teams
- Sub-regional business forums
- Local business leaders
- Local Councillors
- Key local business influencers and entrepreneurs

The above stakeholders have a wealth of local knowledge and often have serious leads and intelligence on potential requirements. During the leasing campaign we will regularly undertake detailed research of the current retail, leisure and makers markets in the local area and wider sub region to understand the current level of demand.

Canvas Local Occupier Demand

A key part of the strategy will be to focus on talking to businesses in the surrounding industrial estates and business locations in the wider area and sub region, especially approaching those in substandard accommodation and trying to find businesses on non-secure or short-term lease agreements, to offer them better terms and conditions in new high-quality fit for purpose accommodation.

Key areas to focus on will be industrial development areas in in Enfield, Waltham Forest, Tottenham and Haringey, Hackney Wick and Bow, Stratford, Ilford and the Royal Docks.

Target Market

In our experience our target market for Aberfeldy Village will be sole traders, start-ups and SME businesses that will be small in scale and roughly between 1 to 9 people in size, or at the smaller end of the small business designation of 10 to 49 people.

We expect the turnover of these businesses will range from £250,000 to £2,000,000 per annum. In similar locations the requirement will be for units ranging in size from 300 sq ft up to 5,000 sq ft, but we believe the average size requirement in the area will be for 500 to 1,500 sq ft units.

A lot of leasing to this market is through word of mouth and so we will need to make sure we are fully utilising our list of key local stakeholders, and ensure that agents are fully incentivised to secure tenants.

Connectivity

It will also be critical to promote the benefits of local connectivity and highlight the travel time to key business locations in Central London such as:

- Oxford Street
- Key airports
- Shoreditch and City Fringe
- Liverpool Street
- Bank
- Stratford
- Victoria
- Kings Cross
- M25 and motorway network



LEASING STRATEGY

Brand Identity and Narrative

It will be important to work closely with EcoWorld and Poplar HARCA to develop a brand identity and a narrative for the development.

Increasingly businesses seeking new commercial space want to be part of a story and feel a sense of belonging to a brand and a place. This is particularly the case for small businesses and start-ups in the UK's new economy.

A commercial place shaping strategy will be critical, as start-up businesses are keen to be part of a buzzy urban community. The scheme presents the perfect opportunity to capitalise on this shift in business requirements and demands to create the kind of setting these businesses are looking for. The marketing narrative should also talk about the wider renaissance of the Borough, focusing on key schemes in the area as well.

A further important factor in today's market is for the neighbourhood that is being created to have lots of high quality open and green space and a series of amenities and facilities. We increasingly find that businesses are very concerned about their carbon footprint, the sustainability of the development and whether the scheme has factored in key issues such as health and wellbeing.

Increasingly, these issues are on the checklist for businesses looking for new space. All of these are key factors that industrial estates and traditional business parks can rarely compete with. If the scheme also incorporates high quality facilities such as public Wi-Fi, good quality cycle storage and a level of car parking, this can often sway the decision-making process for a business looking to let a new space.

Key Messaging

It is our view that the key themes of the campaign will need to be:

- The regeneration of Aberfeldy Village and growth as business location
- East London's new home for creativity and quality independent retail
- Plug and play ready to move in
- A range of different sized units

Events and Activations

As part of the marketing strategy we will organise a series of events and activations to engage potential tenants. This will be an important part of the marketing strategy to get these businesses on site to see the full potential of the development and commercial spaces.

Website

It will be critical to build a professional website - the site and social media will be the first points of engagement for many potential tenants and we need to demonstrate the quality of product with a high functioning, quality website.

Where possible, the website should be built with sufficient capacity to incorporate CGI and video footage which will make the site as exciting and interactive as possible. The website should also contain a high level of content, including thought leadership, details about the scheme, plans of the various unit sizes, specification, the wider narrative about the scheme and the various services and offers. The website will also need to include data and details about the wider regeneration of the Borough and the vision for the long term plan for the area.

Social Media

It will be important to have social media channels for the development and to build a loyal following of interested parties. Twitter as a medium is not always the most positive forum for engaging people, but is still a good place to communicate with the type of businesses we want to attract and to communicate with local people about the scheme. Instagram is a much more positive forum, and utilising high quality photography and CGI's of the scheme will attract a decent following and provide a platform to share our key messaging. We will also use Linkedin, particularly any members of the team that have large and diverse followings, to provide a further platform and more importantly free messaging about the project. Where possible we should use our thought leaders and pre-let tenants to lead the messaging, as this is much more likely to cut through and reach the audience we need to communicate with.

PR

It will be important to try and maximise PR in key target publications, particularly those that might attract end users. However, it will also be useful to build up PR coverage in property publications. The target publications will be:

- The Evening Standard
- Co-Star
- NLA
- Architects Journal
- Property Week
- Estates Gazette
- Dezeen

7. WORKSPACE TYPOLOGIES



WORKSPACE TYPOLOGIES MICRO STUDIO WORKSPACE

- 25 sqm
- 4 meters floor to ceiling
- Large entrance door
- Plug and play with M & E already in place
- Light filled space
- Space for 2 or 3 desks
- Signage opportunity
- Shared welfare and communal facilities



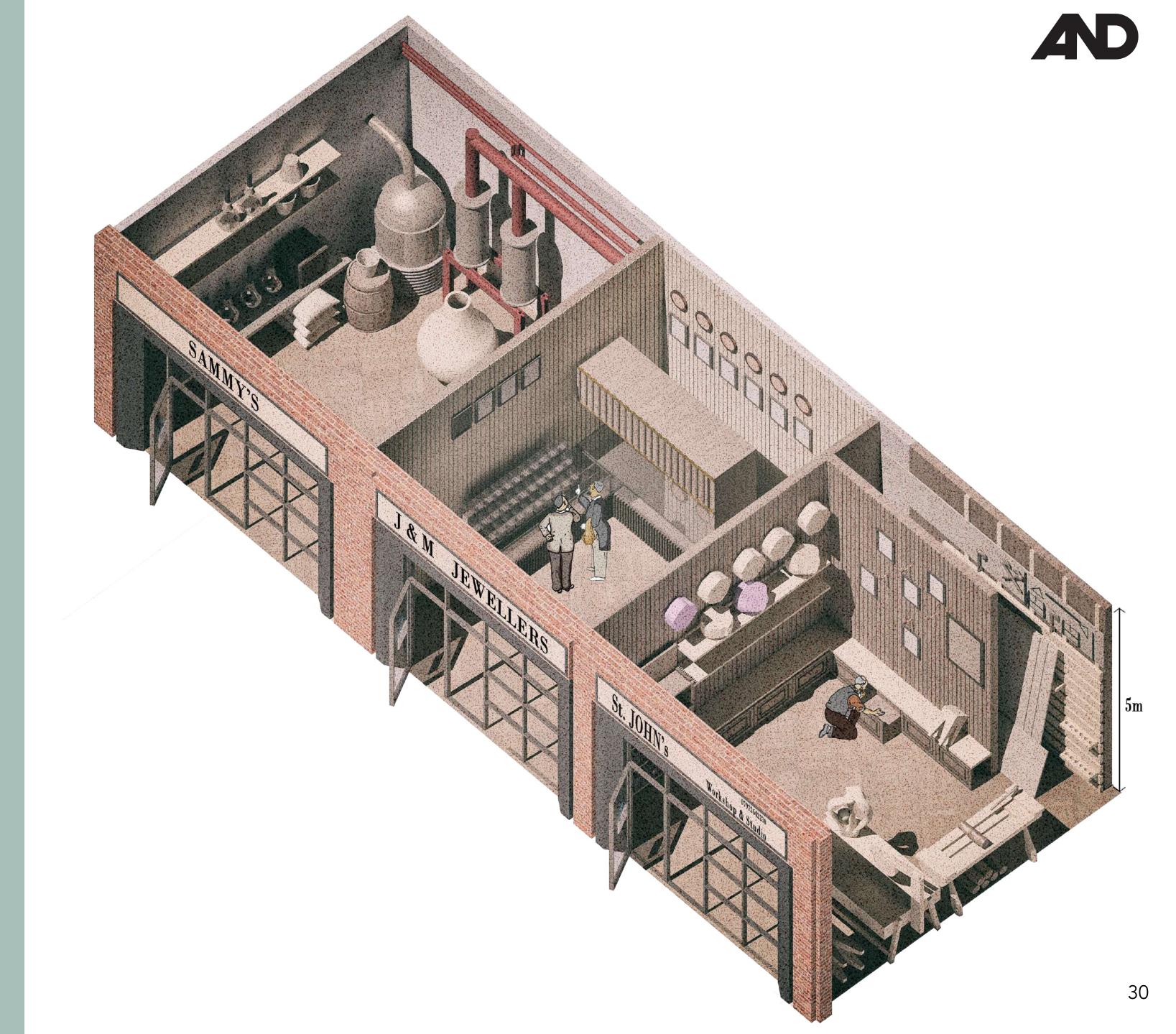
WORKSPACE TYPOLOGIES MICRO MAKER WORKSPACE

- 50 sqm
- Double goods entrance door
- Plug and play specification
- Space for 2 or 3 desks
- Space for signage
- Shared welfare and communal facilities



WORKSPACE TYPOLOGIES MAKER MEWS

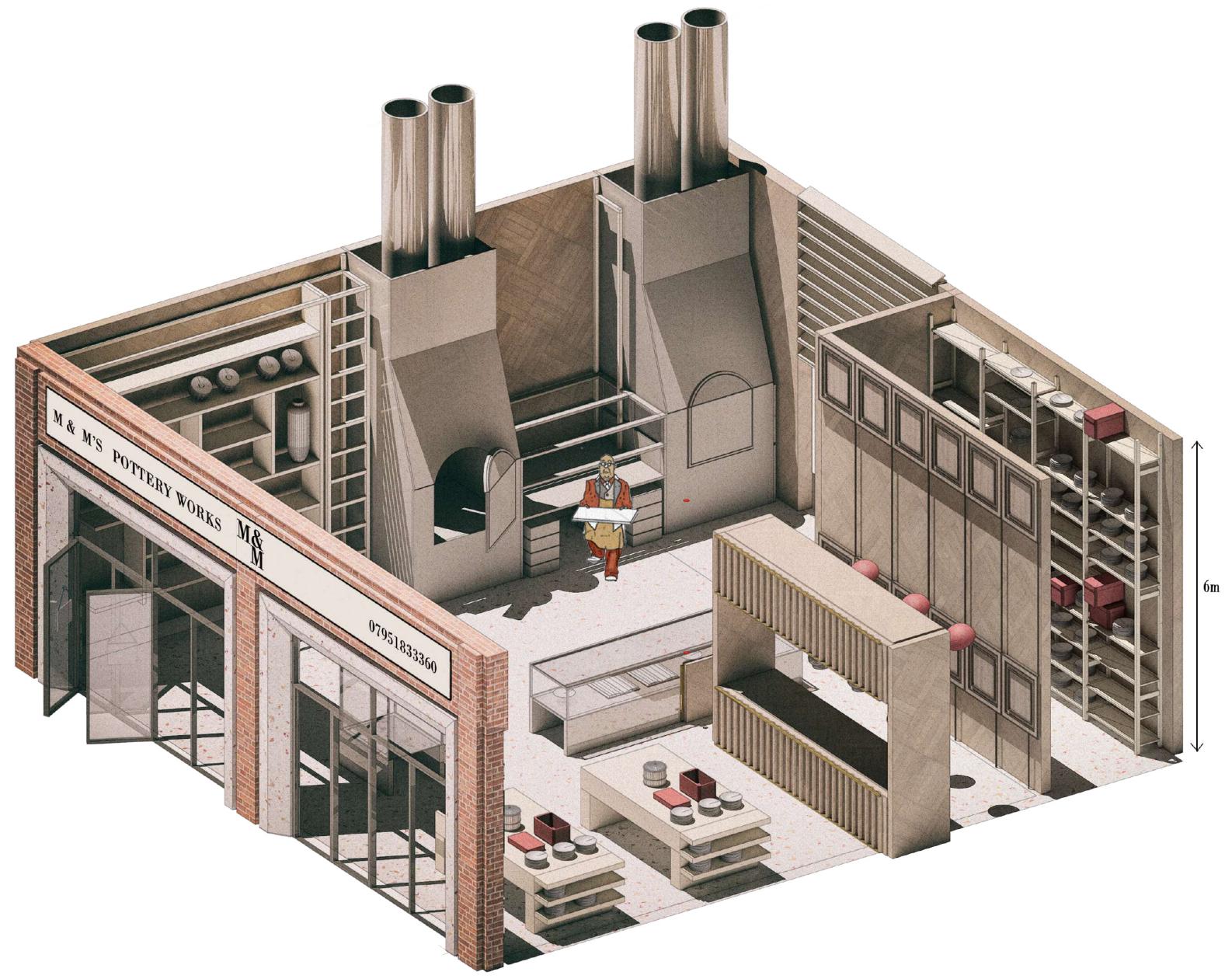
- 100 sqm
- Hard wearing facade
- Double goods entrance door
- Plug and play specification
- Space for signage
- Ability to retail from the frontage
- Shared welfare and communal facilities





WORKSPACE TYPOLOGIES SMALL FACTORY

- 150 sqm
- 2 double goods entrances
- Light filled space
- Ability to retail from the frontage
- Square or rectangular shape
- Space for signage
- Well designed column grid
- Extraction if necessary





WORKSPACE TYPOLOGIES CREATIVE STUDIO

- 250 sqm
- 4 meters floor to ceiling height
- Light filled space
- Usable shape square or rectangular
- Openable or crittall windows
- Well designed column grid
- Large entrance doors
- Enhanced shell and core or Cat A





WORKSPACE TYPOLOGIES MEDIUM FACTORY

- 500 1,000 sqm
- 2 double goods entrances
- Light filled space
- Ability to retail from the frontage
- Ability to include a mezzanine
- Square or rectangular shape
- Space for signage
- Well designed column grid
- Extraction if necessary
- Shell and core specification



8. LIKELY OCCUPIERS





Ceramicist

Size Requirements: 250 - 500 sq ft

Specialist Requirements:

Production area

Desk

Storage space

24 hour access

Fit Out: Enhanced Shell & Core / Plug & Play

Transport: 1 / 2 movements per day

Number of Staff: 1 / 2



DJ & Music Producer

Size Requirements: 400 - 600 sq ft

Specialist Requirements:

Production facility

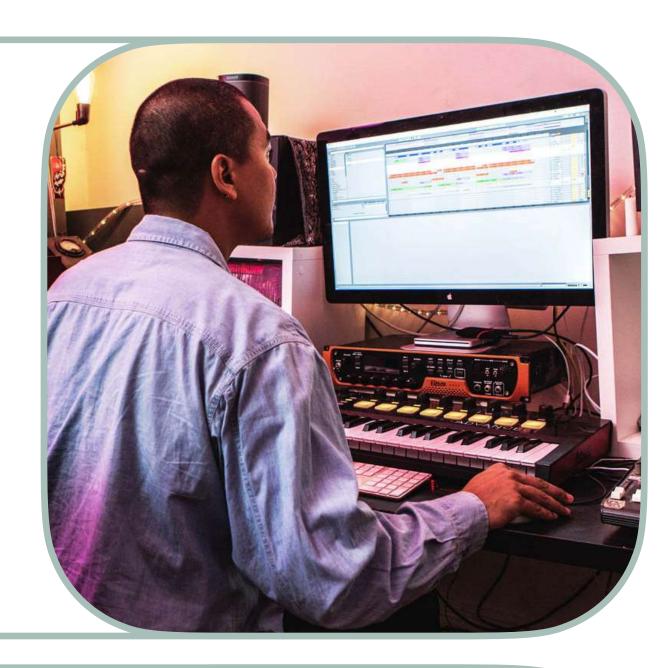
Equipment storage

Seating area

Fit Out: Enhanced Shell & Core / Plug & Play

Transport: Minimal

Number of Staff: 1 - 4 for recording



Small Creative Agency

Size Requirements: 250 - 500 sq ft

Specialist Requirements:

Flexible space

High quality broadband

Fit Out: Plug & Play

Transport: Minimal

Number of Staff: 1/3



Freelancers

Size Requirements: 250 - 500 sq ft

Specialist Requirements:

• Group of freelancers renting small space together

• Flexible space that can fit up to 4 desks

Good quality wifi

Fit Out: Plug & Play

Transport: Minimal

Number of Staff: Up to 4





Artist

Size Requirements: 150 - 500 sq ft

Specialist Requirements:

- Light filled flexible space
- Space for large work bench
- Storage area
- Shared toilet / shower / facilities are preferred

Fit Out: Plug & Play

Transport: 1 movement per day

Number of staff: 1 - 2



Kombucha Drinks Manufacturer

Size Requirements: 1,000 - 2,000 sq ft

Specialist Requirements:

- Light industrial space
- Floor to ceiling height min 4 metres
- Electricity
- Double access doors

Fit Out: Plug & Play

Transport: Up to 5 per day, normally transit sized

Number of Staff: 2 - 5



Start-up Community Interest Company

Size Requirements: 500 sq ft

Specialist Requirements:

- Desk space
- Office set up
- Storage space

Fit Out: Plug & Play

Transport: Minimal

Number of Staff: 4



Event Catering

Size Requirements: 1,000 - 2,000 sq ft

Specialist Requirements:

- Flexible space
- Double access doors
- Electricity
- Light industrial space
- Extraction and sprinkler

Fit Out: Enhance Shell & Core

Transport: Up to 10 movements per day

Number of Staff: Up to 10







Convenience Store

Size Requirements: 2,000 - 4,000 sq ft

Specialist Requirements:

• Floor to ceiling height 3 - 3.5m

• Will expect 12 months rent free

Fit Out: Shell & Core

Transport: 3 transits and 1 large per day

Number of Staff: 5



Independent Deli

Size Requirements: 600 - 800 sq ft

Specialist Requirements:

- May require extraction / may include a café
- Floor to ceiling height 3 4m
- Will expect 3 to 6 months rent free

Fit Out: Plug & Play / Enhanced Shell & Core

Transport: 2 transits per day

Number of Staff: 3



Independent Fruit & Veg Shop

Size Requirements: 600 - 800 sq ft

Specialist Requirements:

- Floor to ceiling height 3m
- Will expect 3 to 6 months rent free

Fit Out: Plug & Play / Enhanced Shell & Core

Transport: 2/3 transits per day

Number of Staff: 3



Homeware Store

Size Requirements: 600 - 1,000 sq ft

Specialist Requirements:

- Floor to ceiling height 3 4m
- Will expect 3 to 6 months rent free

Fit Out: Plug & Play / Enhanced Shell & Core

Transport: 2/3 per well

Number of Staff: 2





Independent Butchers / Fish Shop

Size Requirements: 600 - 1,000 sq ft

Specialist Requirements:

May require extraction / may include a café

• Floor to ceiling height 3m

• Will expect 3 to 6 months rent free

Fit Out: Plug & Play / Enhanced Shell & Core

Transport: 1/2 transits per day

Number of Staff: 3



Craft Bottle Shop

Size Requirements: 500 - 750 sq ft

Specialist Requirements:

• Floor to ceiling height 3m

• Will expect 3 to 6 months rent free

Fit Out: Plug & Play

Transport: 2/3 transits per week

Number of Staff: 3/4



Independent Café

Size Requirements: 600 - 1,000 sq ft

Specialist Requirements:

Floor to ceiling height 4m

• Will expect 3 to 6 months rent free

Fit Out: Plug & Play

Transport: Minimal

Number of Staff: 3



Independent Restaurant

Size Requirements: 700 - 2,000 sq ft

Specialist Requirements:

- Will require extraction
- Increasingly want an open space / external seating area
- Floor to ceiling height 4m
- Will expect 12 months rent free

Fit Out: Enhanced Shell & Core

Transport: 2 transits per day

Number of Staff: 6 - 10







Small Independent Bouldering Centre

Size Requirements: 2,500 - 5,000 sq ft

Specialist Requirements:

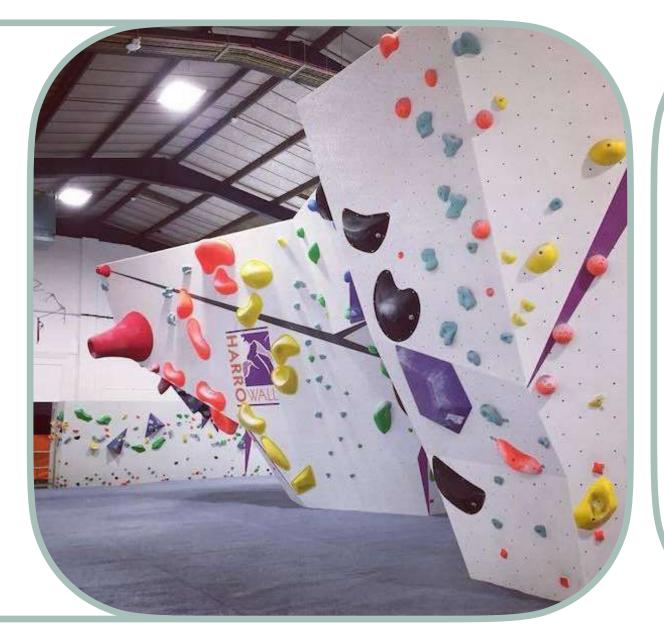
• Floor to ceiling height 5 - 6m

• Will expect 6 to 12 months rent free

Fit Out: Shell & Core

Transport: N/A

Number of Staff: 5



Gym

Size Requirements: 5,000 - 10,000 sq ft

Specialist Requirements:

• Floor to ceiling height 4m

• Will expect 12 months rent free

Fit Out: Shell & Core

Transport: N/A

Number of Staff: 7 - 10



Independent Yoga Studio

Size Requirements: 500 - 1,000 sq ft

Specialist Requirements:

• Floor to ceiling height 3 - 4m

• Will expect 3 to 5 months rent free

Fit Out: Enhanced Shell & Core

Transport: N/A

Number of Staff: 2/3



Specialist Fitness

Size Requirements: 1,000 - 2,000 sq ft

Specialist Requirements:

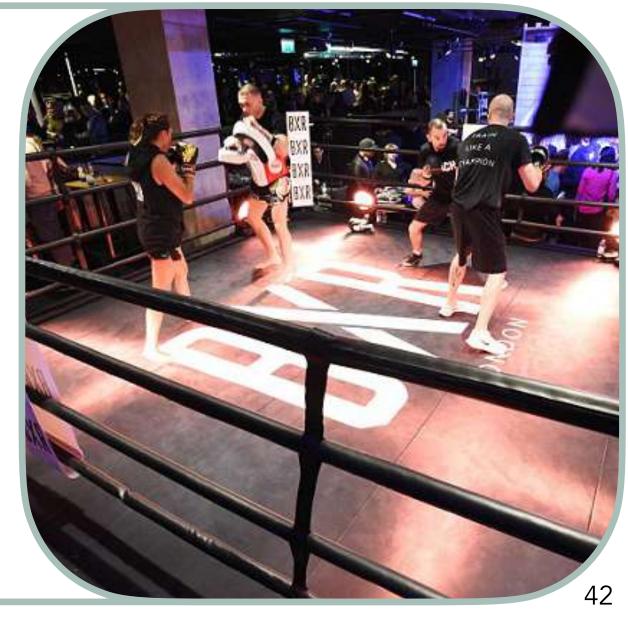
• Floor to ceiling height 4m

• Will expect 6 - 12 months rent free

Fit Out: Shell & Core

Transport: N/A

Number of Staff: 3/4



9. FIT OUT SPECIFICATION



ENHANCED SHELL & CORE

Glazing

Specification should include clear glazing with 12% outer light reflection, semi-low iron glass.

Doors

Specification to include outward opening door-and-a-half frames that are thermally broken aluminium with PPC finish.

Lock and 4 keys to be supplied – Master key to be held by developer / operator

Shuttering

Spec to be agreed with architects and operator taking advice from Secure by Design Officer.

Level of Finish

Construction of shell and core + structural floor screeded and sealed with floor paint. External walls insulated, party walls finished, structural soffits painted all fire and environmental requirements achieved.

Mezzanines

The unit height will require a minimum of 5.27 meters clear to enable a mezzanine level. Further discussion required on whether a mezzanine is installed and what percentage level of unit coverage i.e 30% or 50% coverage of floor area. If mezzanine is provided as part of spec further work is required on the specification of the system.

Walls

To be white washed or as struck concrete

Wall loadings should be capable of supporting storage and fixing loads

Signage

A full signage and wayfinding strategy will be designed and provided by the landlord. Tenants will be provided with guidelines as to how to use this.

Ceilings

The tenant must ensure that any fixtures or fittings to the ceiling do not interfere with the cabling, pipework and lagging contained within, installing suspended ceilings where necessary. Landlord approval is required for any fixtures and fitting to any ceiling within the unit. Access must be maintained to all Landlord media.

Soffits

To be white washed as struck concrete or similar. Where plasterboard construction used for soffit / upper floor construction the boards should be taped & jointed and painted.

Structural Floor Loadings

The slabs to the units shall be designed for the following loading allowances as a minimum, or as per BS EN 1991-1-1 and the UK National Annex, where higher:

Specialist advice to be taken due to unique nature of project – load bearings critical. Suspect it will be the following:

Plant areas 7.5kN/m2

Staff only areas 3.0kN/m2

Workshop floor/maker space area 20kN/m2

Mechanical, Electrical and Plumbing

The design, installation and operation of all systems shall comply with all statutory and regulatory obligations where applicable, including the following:

All relevant British Standard Specifications

Engineering Regulations (IEE) (BS7671) Institute of Plumbing Design Guide (IOP)

Water Regulations

The Building Regulations

Loss Prevention Council (LPC)

British Standard Code of Practice (BSCP)

CIBSE Guides to Current Practice and Technical Memoranda Institute of Electrical Local Fire Brigade Requirements

Building Research Establishment (BRE) Digest Recommendations Health & Safety at

Work Act
CDM Regulations

Acoustic and Environmental Considerations

Consideration to be given in the detailed design of the external envelope to the acoustic, malodorous, dust and vibration transfer from the adjacent uses.

Emergency Lighting

Emergency Lighting to be provided and must adhere to the legal requirements. Building must have lighting fitted to emergency routes and exits requiring illumination.

Ventilation Systems (to check / take suitable professional advice)

A louver allowance of .25m2 aerodynamic free area for both the general ventilation inlet and discharge to be allowed at high level on each floor.

The Tenant will be responsible for providing their own ventilation systems, utilising the louvers.

The Tenant will be responsible for ensuring that the units meet Part F of the Building Regulations as a minimum.

Security Systems

Tenant may install their own security system

Telephone and Communications

Incoming ducts provided

Tenant to undertake own works on connection to telephone and data.

Spare Ducts

To allow the provision of any additional tenant requirements and future proof for any future technological advancements or innovation that tenant may require.

Tenant's Plant

It is the responsibility of the future tenant to provide all necessary additional works to support their plant requirements within their allocated demise and all works are subject to the approval of the Landlord.



ENHANCED SHELL & CORE

Electrical Installation

Developer to provide an independent 3-phase electrical supply and a meter with supply capacity based on 300 watts/m2 All to be registered with an energy provider and operational prior to handover. Tenant to take out account directly with utility company.

MPAN Number to be held by Developer / Operator for inclusion in the tenant pack.

Electrical regulations

All electrical installations, materials, components, equipment and workmanship must comply with statutory and other obligations and the regulations of any Local Authority, Public Services or Statutory Undertaking relating to the execution of the works. In particular they must comply with the requirements of:

The IEE Regulations for Electrical Installations (BS7671)

Regulations under the Electricity Acts

Health & Safety at Work Act

The Electricity at Work Regulations

The National Inspection Council for Electrical Installation Contracting

The Building Regulations

C.I.B.S.E. Guides

CDM Regulations

BS 5266 Emergency Lighting: Code of Practice

BS EN 1838 Lighting Applications: Emergency Lighting

BS 5839 Fire Detection and Fire Alarm Systems for Buildings: Code of Practice

BS EN 7430: 2011 Code of Practice for Earthing

All other Relevant British Standard Specifications and Codes of Practice

Power Distribution

Developer to leave incoming power operational to feed lighting and also 1 double socket close to meter. Further distribution undertaken by tenant.

Gas Supply

Developer to supply any incoming gas supply and meter, registered and operational prior to handover. Pipework to be left terminated beyond the meter. Supply capable of supplying 200W / m2. Tenants to take out directly with utility company. MPRN Number to be advised to the developer / operator for inclusion in tenant pack

Water Supply

Developer to supply an incoming 28mm cold potable water supply delivering an equivalent of 1.5 litres / second at bar 3 per 100 sqm of GIA.

Meter provided by developer

Water supply to be registered with utility company and operational prior to handover

Small Kitchen Point

Howdens or similar

White or Grey Units, surfaces and cupboards- Contemporary style not old fashioned

Sink

Tilino

Include 2 double electrical sockets

Remaining wall areas to be painted white

Bathrooms (location to be agreed)

Basic WC facilities to be provided by the developer. Numbers to be calculated based on full-time equivalent (FTE) staffing numbers and calculated using the following guidance in the Homes & Communities Agency (HCA) Employment Density Guide. Will need to be suitable for the appropriate light industrial/maker space category (typical figures between 25sqm to 47sqm per FTE should be expected with Male: Female ratio being 50%: 50% split.

WC facilities to comprise basic sanitaryware (Ideal Standard, Concept range, or similar quality level), floor finishes of tile or sheet flooring, tiled walls to wet areas with remainder painted moisture resistant plasterboard with scrubbable bathroom paint. At least one in each group of WCs to be Doc M compliant accessible cubicle. Where larger numbers are clustered together it will be acceptable to provide a cubicle system.

Shower rooms will be required to promote cycling to work to be provided by the developer close to the principle staff/worker entrance

Provision of toilet cubicles to be DDA Compliant

Sink and taps

Toilet system

Toilet roll holder

Sanitary bin solution

Both to be half tiled – using neutral metro tile

Remaining wall areas to be painted

Appropriate easy clean vinyl flooring

30 minute fire doors with locking system

Cycle Storage

As determined in planning agreement – allow one space per 250 sqm and 1 additional space per 1000 sqm for visitors.



PLUG&PLAY

Glazing

Specification should include clear glazing with 12% outer light reflection, semi-low iron glass.

Doors

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Ceilings

The tenant must ensure that any fixtures or fittings to the ceiling do not interfere with the cabling, pipework and lagging contained within, installing suspended ceilings where necessary. Landlord approval is required for any fixtures and fitting to any ceiling within the unit. Access must be maintained to all Landlord media.

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Fire Brigade Requirements

Building Research Establishment (BRE) Digest Recommendations Health & Safety at Work Act

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Power Distribution

Developer to leave incoming power operational to feed lighting and also 1 double socket close to meter. Further distribution undertaken by tenant.



PLUG & PLAY

Electrical regulations

All electrical installations, materials, components, equipment and workmanship must comply with statutory and other obligations and the regulations of any Local Authority, Public Services or Statutory Undertaking relating to the execution of the works. In particular they must comply with the requirements of:

The IEE Regulations for Electrical Installations (BS7671)

Regulations under the Electricity Acts

Health & Safety at Work Act

The Electricity at Work Regulations

The National Inspection Council for Electrical Installation Contracting

The Building Regulations

C.I.B.S.E. Guides

CDM Regulations

BS 5266 Emergency Lighting: Code of Practice

BS EN 1838 Lighting Applications: Emergency Lighting

BS 5839 Fire Detection and Fire Alarm Systems for Buildings: Code of Practice

BS EN 7430: 2011 Code of Practice for Earthing

All other Relevant British Standard Specifications and Codes of Practice

Gas Supply

Developer to supply any incoming gas supply and meter, registered and operational prior to handover. Pipework to be left terminated beyond the meter. Supply capable of supplying 200W / m2. Tenants to take out directly with utility company. MPRN Number to be advised to the developer / operator for inclusion in tenant pack

Water Supply

Developer to supply an incoming 28mm cold potable water supply delivering an equivalent of 1.5 litres / second at bar 3 per 100 sqm of GIA.

Meter provided by developer

Water supply to be registered with utility company and operational prior to handover

Power Distribution

Developer to incorporate incoming power to feed lighting and provide double socket close to meter. Further distribution of double sockets located strategically across each unit.

Air-conditioning and ventilation (HVAC)

Developer to provide heating and ventilation system to include radiator and air conditioning system to provide cooling if necessary

Signage Power

Supply Developer to provide a supply cable left suitably terminated on the soffit close to the middle of the main entrance doors ready to be adapted and extended to supply internal or external signage by the incoming tenant. Developer to provide a conduit from within the unit to the identified projecting signage and/or external signage location allowing the tenant to connect their signage without affecting the warranty of the envelope. Conduits to be left capped and weathertight

Bathrooms (location to be agreed)

Basic WC facilities to be provided by the developer. Numbers to be calculated based on full-time equivalent (FTE) staffing numbers and calculated using the following guidance in the Homes & Communities Agency (HCA) Employment Density Guide. Will need to be suitable for the appropriate light industrial/maker space category (typical figures between 25sqm to 47sqm per FTE should be expected with Male: Female ratio being 50%: 50% split.

WC facilities to comprise basic sanitaryware (Ideal Standard, Concept range, or similar quality level), floor finishes of tile or sheet flooring, tiled walls to wet areas with remainder painted moisture resistant plasterboard with scrubbable bathroom paint. At least one in each group of WCs to be Doc M compliant accessible cubicle. Where larger numbers are clustered together it will be acceptable to provide a cubicle system.

Shower rooms will be required to promote cycling to work to be provided by the developer close to the principle staff/worker entrance

Provision of toilet cubicles to be DDA Compliant

Sink and taps

Toilet system

Toilet roll holder

Sanitary bin solution

Both to be half tiled – using neutral metro tile

Remaining wall areas to be painted

Appropriate easy clean vinyl flooring

30 minute fire doors with locking system

Small Kitchen Point

Howdens or similar

White or Grey Units, surfaces and cupboards—Contemporary style not old fashioned

Tiling

Include 2 double electrical sockets

Remaining wall areas to be painted white

Telecommunications (Phone & Data)

Developer to provide a working telephone and fibre data connection (with a minimum bandwidth of 100Mbps per 100sqm GIA) and register to a service provider ready for the tenant to take on a contract directly. Cabling to be brought into the unit and left terminated in a suitable and convenient location within a distribution point ready for the operator to provide onward distribution to individual tenancies.

Security Alarm

Developer to provide basic intruder alarm system with sensors on doors and windows (no PIR). To be registered to monitored service and left operational prior to handover. System to be capable of expansion (with sufficient zones) to cover subdivision of unit into individual subtenancies of an average size of 70sqm each. Tenant to take out account directly with monitoring company.

Fire & Smoke Alarm

Developer to provide two-stage BS 5839 L1 grade fire alarm system for the unit with the capacity in the future to allocate a zone individual sub-tenancies of 70sqm average size. They system should be linked into and identified as an individual zones on a wider landlord's system (e.g. the adjacent residential or office accommodation). Design to be developed and installed in line with the requirements of developed fire strategy for the wider development

Sprinklers

Developer to provide sprinkler system to entire unit if required in line with the requirements of developed fire strategy for the wider development. Sprinkler heads to be laid out on a regular grid with regular isolation valves allowing for adaptation by incoming operator following partitioning of unit.

Smoke Extract

Consideration to be given to the management of smoke in the event of a fire. A strategy for passive or mechanically assisted smoke extraction to be developed and installed by the developer in line with the requirements of detailed fire strategy for the wider development, and capable of further extension by an incoming operator to serve a partitioned layout with an average unit size of 70sqm.

Cycle Storage

As determined in planning agreement – allow one space per 250 sqm and 1 additional space per 1000 sqm for visitors.

10. CONCLUSION

CONCLUSION

The commercial component of the Aberfeldy Village scheme has been at the centre of the planning process for the whole Masterplan. The proposals outline a highly considered offer that will provide a range of commercial facilities, specifically tailored to the community in the area and the businesses that are likely to lease the space.

The commercial space focuses on provision for small business both in terms of workspace and retail, and the offer to market is flexible and accessible which is critical for small businesses when they are considering leasing space.

The commercial workspace provision offers 5,785.1 sqm of space, which we think is the right level considering the area and the types of business likely to lease it in the future. The space has been designed to be flexible and real consideration has been given towards the specification and configuration of units. The design process is evidenced based, and has examined the local market and requirements in detail to reach the proposed offer. The phased delivery will help to ensure that floorspace is delivered to the market in a sustainable and viable way, to prevent having a large amount of void space on the market for a long period of time. We have set out our detailed marketing strategy in Chapter 6, which has been devised to build the narrative for the scheme and excite potential tenants.

This document also covers the Phase A detailed planning application which includes the High Street and the new central square. These will be two of the main retail locations for the scheme, and will be critical for the wider placemaking and service provision for the community in the new Aberfeldy Village.

We have considered the quantum of retail space and undertaken a full Retail Impact Assessment, which is separate to this document, and considered in detail whether the proposed Masterplan has any impact on the wider area. Aberfeldy was already a local centre and a functioning High Street that served the local population. We have assessed the impact and feel the proposals do not impact the wider retail provision in the area, and will provide a retail offer that will meet the needs of both the existing and future communities, along with workers and visitors. This is taking into consideration the significant increase in the population that both this scheme and surrounding schemes coming forward will deliver.

