

**NON-EMPLOYMENT WITHIN THE
UPPER LEE VALLEY**

**A report to the London
Development Agency
by SQW Ltd.**

**RESEARCH INTO NON-EMPLOYMENT WITHIN THE
UPPER LEE VALLEY**

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by SQW Ltd.**

SQW Ltd
economic development consultants

52 Russell Square
London
WC1B 4HP

Tel: 0207 7307 7140

Fax: 020 7307 7141

Email: pconvery@sqw.co.uk

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1 Introduction

1.1 The London Development Agency (LDA)'s Upper Lee Matrix Group commissioned SQW Limited to undertake research into the underlying causes for the continuing pockets of relatively high levels of unemployment within the Upper Lee Valley (ULV). This report contains the output of the study.¹

1.2 The ULV area has been designated by LDA as one of 9 priority regeneration areas for development through its Single Programme. The ULV runs from the M25 in the north to Leyton in the south, taking in a corridor of mainly industrial and commercial uses. It cuts through three local authorities – the London Boroughs of Enfield, Haringey and Waltham Forest. The interventions through the Single Programme are expected to focus on two differently defined areas:

- a tight “core area” – taking in the strategic industrial sites – will be the primary focus for investment in land property and infrastructure
- a broader “loose area” covering the whole of the three Boroughs which will be the focus for business and people focused initiatives – with priority given to a number of disadvantaged wards that have been identified in conjunction with the 3 Boroughs.

Method

1.3 Following these definitions, this study has sought to focus on the whole of the three boroughs, although as we show there are significant differences between and within them. This report focuses very much on the supply side of the labour market. It is based on the analysis of:

- a wide range of secondary data covering socio-economic issues – some are drawn from national sources which can therefore be compared across areas, while other parts are based on local, ad hoc studies
- consultations with key agencies which operate in the area

¹ The report authors are Paul Convery, Jonathan Cook and Graham Thom with additional research by Lisa McCrindle and Charlotte Dent

- data supplied by delivery organisations about the nature and extent of training and employment provision in the local area.

Report structure

1.4 The remainder of this report is structured as follows:

- Chapter 2 presents an overview of the data across the three boroughs
- Chapters 3-5 examine each of the three boroughs in more detail
- Chapter 6 maps existing local provision
- Chapter 7 considers some of the reasons why unemployment may have remained high, despite repeated initiatives in each area
- Chapter 8 introduces an important element of the demand side, with an initial review of the priority sites in ULV
- Chapter 9 sets out the conclusions from the review and identifies a series of next steps.

2 Overview of the area

Introduction

2.1 This chapter reviews the three London boroughs in the Upper Lee Valley area (Enfield, Haringey and Waltham Forest) considering three main strands:

- the current unemployment situation
- an analysis of each individual borough examining specific local issues and data
- changes over time through an examination of population churn and employment churn.

2.2 The report makes much use of data including population data, migration data, and the data from the claimant count and labour force survey. Some of the data is due for revision following the Census in 2001.

Employment

2.3 The charts below demonstrates a marked shift in local employment over the last 20 years. During this time there has been a decline of around 40,000 manufacturing jobs. This has been broadly off-set by the growth in the service sector. These trends have been most marked in Enfield, which has the highest employment base of the three borough and accounts for around half of the total shift in employment.

Chart 2.1: Manufacturing employment 1981-2001

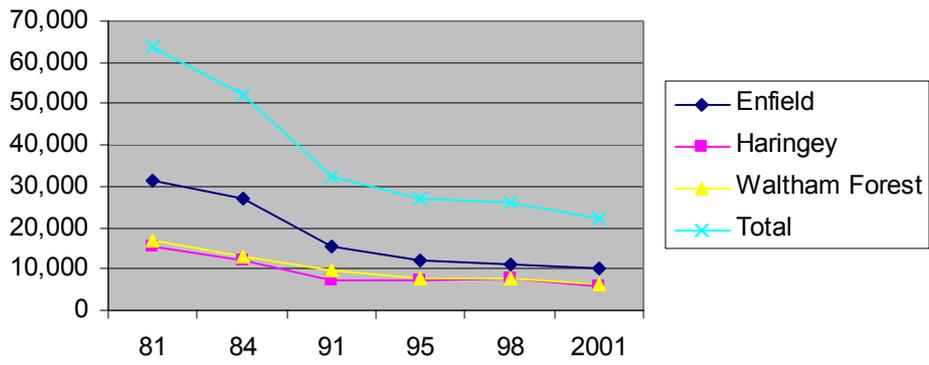


Chart 2.2: Service employment 1981-2001

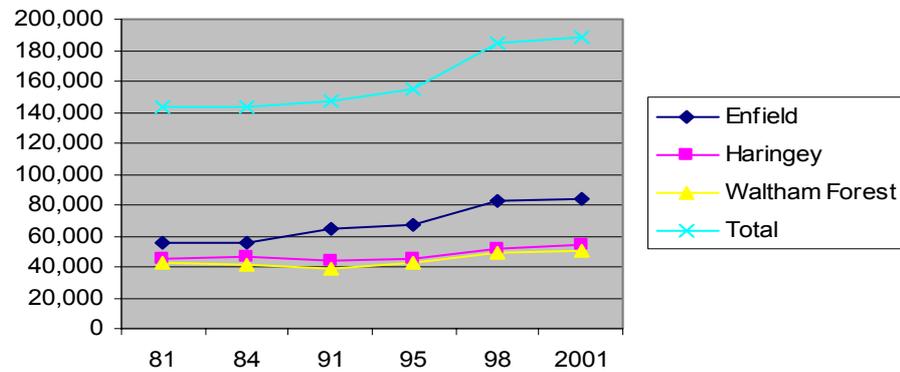
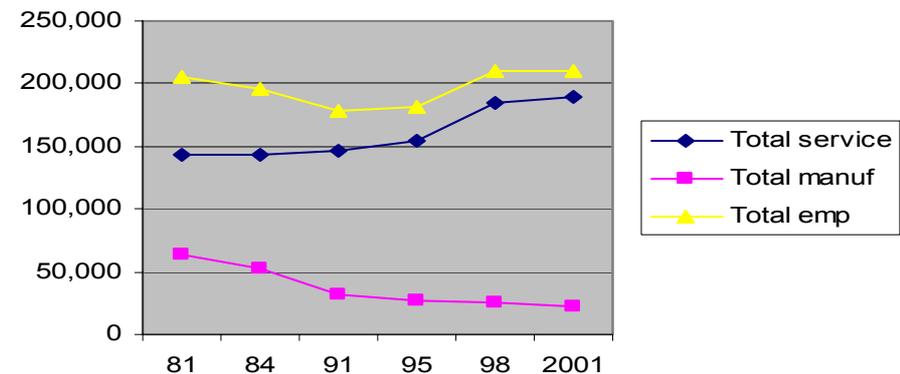
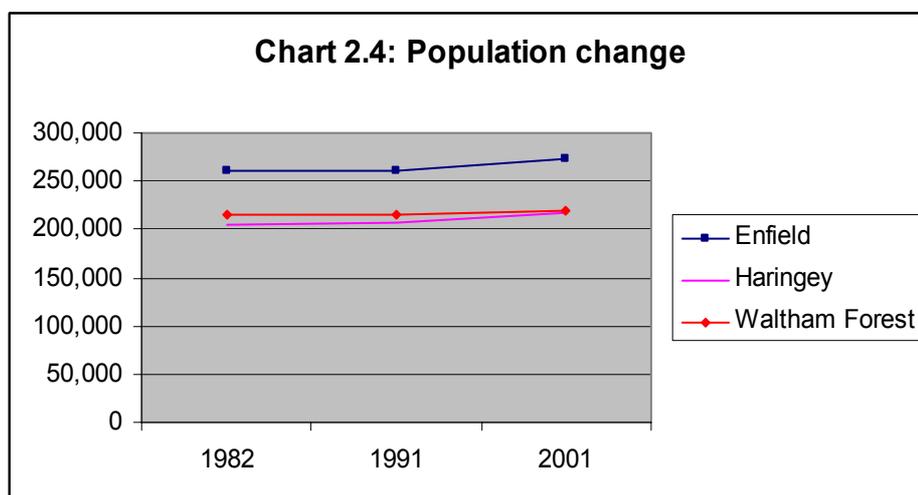


Chart 2.3: Total employment 1981 - 2001



Population

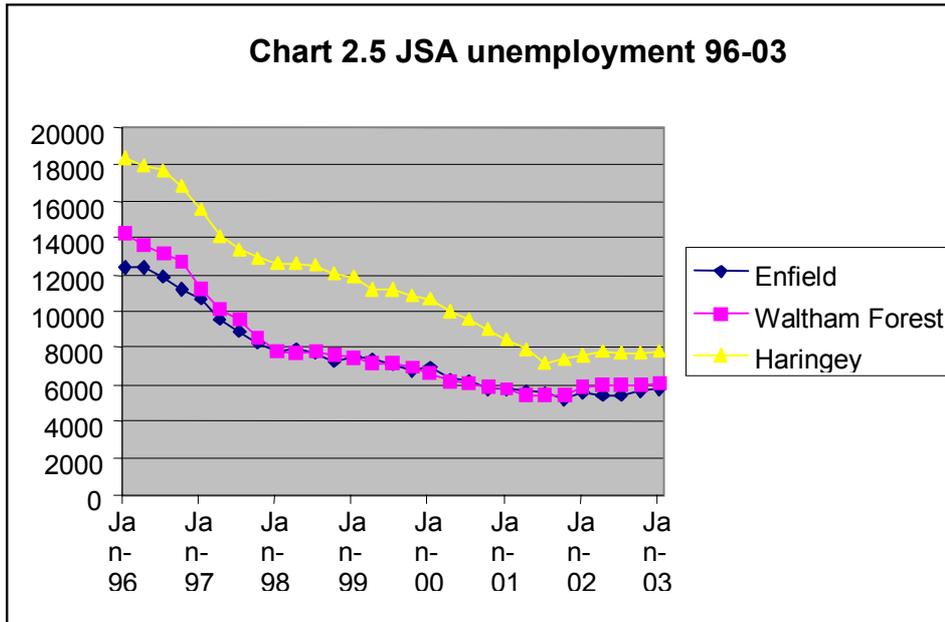
- 2.4 While total employment is at a similar level to 20 years ago, the total population has risen slightly in each of the three boroughs (Chart 2.4). The total increase is around 30,000, or 4% of the starting total.



Current unemployment

Claimant Count

- 2.5 The claimant count measures those who are unemployed and are receiving Jobseekers Allowance (JSA) because of this. Chart 2.5 gives a historical perspective, showing a sustained fall in unemployment by this measure in all three areas over the past six years. The decline of 50-60% is in line with the figure for London as a whole.
- 2.6 The JSA unemployment figures also illustrate that the period of sustained total employment growth since 1995 has corresponded with a significant fall in unemployment: since 1995 the number of local jobs has increased by around 30,000; and since 1996 unemployment has fallen by around 24,000. It is, of course, simplistic too assume that all those leaving the unemployment register will have entered the jobs created locally. However, these figures do indicate the importance of favourable economic conditions in bringing down unemployment.



2.7 It indicates that Haringey has the highest unemployment rate of the three boroughs in the Upper Lee Valley, and one that is significantly above the London rate. Waltham Forest also has an unemployment rate above the rate for London, whereas Enfield's is slightly below (Table 2.1). In total, slightly less than 20,000 people are receiving Jobseeker's Allowance across all 3 Boroughs.

Table 2.1: Unemployment rates by the JSA claimant count in the Upper Lee Valley

Geographical Area	Claimant Count	Unemployment Rate
Enfield	5,508	4.5%
Haringey	7,701	7.6%
Waltham Forest	5,945	5.9%
London	167,043	4.7%

Source: ONS (2002 – monthly average for the year, rates as % of economically active population)

2.8 If we separate the JSA claimant count down by age group we can see that Haringey's unemployment is particularly concentrated for groups under 40. Unemployment is especially concentrated in 20-24, 25-29, 30-34 and 35-39 age groups. In Enfield, unemployment is noticeably high for 20-24 year olds and for 50-59 year olds. Waltham Forest has a marked unemployment problem amongst under 20s and 20-24 year olds. The proportion unemployed who are 30-34 is also quite high in Waltham Forest. Table 2.2 demonstrates the breakdowns for each of the individual London boroughs and London overall.

Age group	Enfield	Haringey	Waltham Forest	London
Under 20	7.0%	7.0%	8.1%	7.2%
20-24	16.1%	16.1%	15.5%	15.0%
25-29	14.7%	16.2%	15.7%	15.7%
30-34	14.4%	16.2%	16.6%	15.8%
35-39	13.8%	15.3%	13.6%	14.0%
40-44	10.2%	10.5%	9.7%	10.5%
45-49	8.1%	7.8%	7.8%	8.2%
50-54	7.6%	5.7%	6.5%	6.9%
55-59	7.1%	4.6%	5.7%	5.8%
Over 60	1.0%	0.7%	0.8%	0.8%
Total	100%	100%	100%	100%

Source: ONS (2002 – monthly average for the year)

2.9 Duration of unemployment is slightly higher for Haringey than for London overall, although it is not much different than in inner London. In Enfield and Waltham Forest, 37% and 38% of claimants respectively have been claiming for over 6 months, slightly above the 36% for outer London (Table 2.3).

Geographical Area	Under 6 months		6-12 months		Over 12 months	
	Number	% of all claimants	Number	% of all claimants	Number	% of all claimants
Enfield	3,416	63%	1,041	19%	984	18%
Haringey	4,251	56%	1,682	22%	1,670	22%
Waltham Forest	3,609	62%	1,140	19%	1,108	19%
Inner London	50,733	57%	18,797	21%	19,649	22%
Outer London	48,544	65%	14,083	19%	12,544	17%
London	99,277	60%	32,880	20%	32,193	20%

Source: ONS (2002 – monthly averages of claimants for the year)

ILO Unemployment

2.10 The ILO unemployment measures those who are currently seeking and are available to start work. ILO unemployment is particularly high in the borough of Haringey, but approximates to the London rate in the boroughs of Enfield and Waltham Forest. According to the Local Area Labour Force Survey just under 11% are unemployed in Haringey. This compares to just under 7% for its two neighbouring Upper Lee Valley boroughs.

Geographical area	Number unemployed	% Unemployment
Enfield	8,000	6.6%
Haringey	11,000	10.8%
Waltham Forest	7,000	6.9%
London	246,000	6.7%

Source: Local Area Labour Force Survey (2001)

2.11 Unemployment is particularly high across all ages in Haringey. In Enfield and Waltham Forest the 25-34 age group suffers from particularly high unemployment compared to London overall.

Age Group	Enfield	Haringey	Waltham Forest	London
16-24	13%	15%	11%	14%
25-34	8%	8%	8%	6%
35-49	6%	9%	5%	5%
50-retirement	4%	6%	5%	5%

Source: Local Area Labour Force Survey (2001)

- 2.12 The Local Area Labour Force Survey indicates that male unemployment is high in the boroughs of Enfield and Haringey. In these two boroughs, the unemployment rates for males of working age is approximately 8% and 12% respectively, whereas the rate is 7% for London overall. For Waltham Forest, the male unemployment rate is approximately 5%, but the female rate is 9%.

Geographical area	Male	Female	Total
Enfield	8%	4%	7%
Haringey	12%	10%	11%
Waltham Forest	5%	9%	7%
London	7%	6%	7%

Source: Local Area Labour Force Survey (2001)

Inactivity

- 2.13 The borough of Haringey has a high incidence of economic inactivity, and this is so for both males and females. The overall inactivity rate for people of working age for this borough is 33%, compared to 25% for London. Amongst males, Waltham Forest also has a high inactivity rate, as Table 2.7 shows.

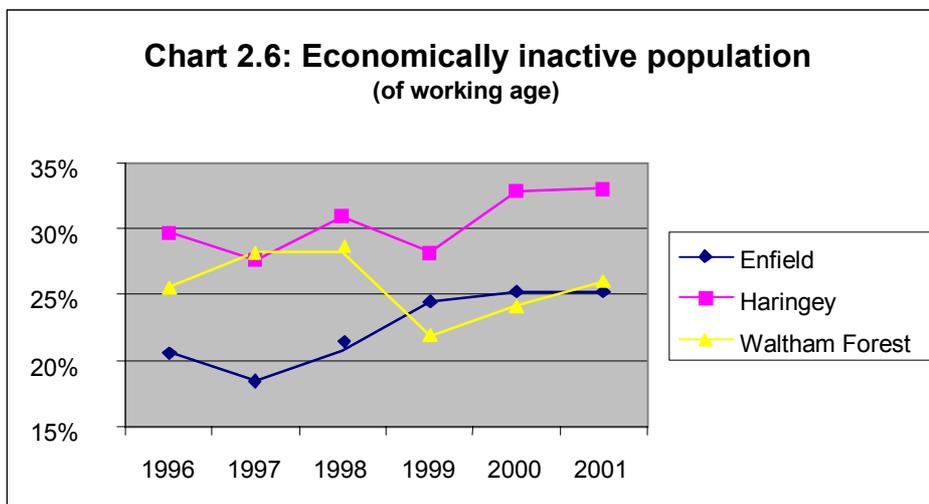
Geographical area	Male inactivity	Female inactivity	Overall inactivity
Enfield	16%	35%	25%
Haringey	26%	41%	33%
Waltham Forest	21%	31%	26%
London	18%	32%	25%

Source: Local Area Labour Force Survey

- 2.14 The critical point about this level of inactivity is that a quarter of all people in the 3 Borough area who are inactive *want a job*. It is not strictly correct to describe this population as being “unemployed” instead they are categorised as economically inactive because they have insufficient attachment to the labour market (demonstrated by either having actively looked for work in the most recent 4 weeks or being available to start work within a week.)
- 2.15 But, at almost 33,000 people, this number exceeds the 26,000 who are ILO unemployed and indicates that nearly 60,000 people in the 3 Borough area want to work. If expressed in the way that “unemployment” rates are usually calculated, this would mean jobless rates of 16% in Enfield, 21% in Haringey and 18% in Waltham Forest.

2.16 Although this wider non-employed population wants to work, the Labour Force Survey results indicate a substantial degree of detachment from the labour market and a range of barriers to entering work. Firstly it should be recognised that, of the 33,000 economically inactive who want to work, 56% are women and nearly a half of these women cite "family or home responsibilities" as their main reason for not looking for work. The next most significant group are those who have not looked for work on grounds of health or disability. Nearly a quarter of the 33,000 have not sought work for this reason. The remainder of this population is classed as a "discouraged worker" who does not believe work is available (a relatively small group), some students or those giving "other" reasons (the latter accounting for another 25% of the 33,000 total inactive who want to work).

2.17 It also appears that, not only are inactivity rates high, but that this problem has increased over recent years - at a time of falling unemployment. The percentage of the population of working age, who are economically inactive has grown by around 7,000 people from an already high base in Haringey and by 10,000 in Enfield, a faster rate of increase albeit from a lower base point (Chart 2.6). This is not significantly affected by any increases in full-time education. The proportion of 18-24 year-olds participating in full-time education has remained broadly stable in all 3 Boroughs - representing just under 5% of the working age population.



2.18 The difficulties involved in re-engaging some of this group and the time required to get them job ready were recognised as a serious issues amongst a number of the consultees in this study. Moreover, people who are loosely connected to the labour market (or have become disconnected with it) often are not aware of opportunities which may exist, because their networks do not included sufficient employed people to tell them of:

- possible job openings

- certain types of job which would be of interest to them.

Qualifications

2.19 Interestingly, Haringey has a high proportion (36%) of residents with high level qualifications i.e. at degree level. However, there is also a large proportion (19%) with no qualifications. Waltham Forest also has a large proportion (20%) with no qualifications. Enfield and Waltham Forest have a large base of people with low level qualifications, 28% at NVQ1 or 2 in Enfield and 27.9% at NVQ1 or 2 in Waltham Forest.

Table 2.8: Qualifications (% of working age at that level)				
	Enfield	Haringey	Waltham Forest	London
NVQ4+	23.3%	35.8%	20.2%	30.8%
NVQ3	14.2%	9.7%	12.5%	12.2%
Trade Apprenticeships	4.6%	n/a	4.7%	4.6%
NVQ2	14.1%	7.5%	14.3%	11.7%
NVQ1	13.9%	7.8%	13.6%	10.7%
Other qualifications	14.8%	18.4%	15.1%	15.7%
No qualifications	15.1%	19.1%	19.5%	14.7%

Source: Local Area Labour Force Survey (2001)

3 Borough analysis - Enfield

Deprivation

- 3.1 Four of Enfield's 33 wards (1991 wards) are classified as being in the 10% most deprived wards in England (Oxford University's Indices of Multiple Deprivation 2000). These are Angel Road, Craig Park, Latymer and St Peter's.
- 3.2 MORI conducted a research study for Enfield, which consisted of a household survey of 1,014 interviews with residents aged 16+. The interviews were carried out in the five priority wards that have been earmarked for regeneration activity. These are the aforementioned four most deprived wards and also the Ponders End ward (collectively the Enfield NR area). Here, we highlight some the results from their study that are relevant to this review.

Population structure

- 3.3 The age structure indicates that there is a large proportion of people who are under 16 in the Enfield NR compared to London and the UK. The Enfield NR Area and Enfield as a whole is slightly older in the middle range, having lower proportions in the 25-34 age group than London overall, and higher proportions in the 35-54 age group than London overall.

Table 2.1: Population age structure (%)

Age	Enfield NR			
	Area	Enfield ²	London ³	United Kingdom ⁴
Under 16	30		19	20
16-24	12	33	14	11
25-34	15	15	22	14
35-54	25	27	23	28
55-64	8	10	9	11
65-74	6	7	7	8
75+	4	7	6	7

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

- 3.4 The mean household size in the Enfield NR Area is 2.7 (MORI 2002), which is higher than the Enfield average of 2.5 and the England and Wales average of 2.4 (Census 2001). The MORI survey indicates that in the Enfield NR Area there is a higher proportion of households

² SOURCE

³ Census 1991

⁴ Census 2001

that are one-parent families (17%) than in Enfield as a whole (8%) Outer London (7%) and England and Wales (7%)⁵.

- 3.5 There are differences in households compositions between the wards in the Enfield NR Area, with Angel Road and Craig Park having greater proportions of households both with children and that are single parent households (Table 2.2).

Table 2.2: Household Composition – wards

Geographical Area	With children	Single parent
Enfield NR Area	43%	17%
Angel Road	51%	24%
Craig Park	48%	21%
Latymer	43%	14%
Ponders End	40%	13%
St Peter's	36%	14%

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

- 3.6 The Enfield neighbourhood renewal area is ethnically diverse. Sixty per cent describe themselves as white, although there are significant minorities of Turkish and Greek Cypriots (nine and three per cent respectively). There is a large proportion of people who describe themselves as Black or Black British (24%), 12% being Caribbean and 11% African.

- 3.7 Within the Enfield NR Area, there are some variations. Angel Road has a higher proportion of Black or Black British residents (34% compared with 24% overall). Latymer has a greater proportion of residents describing themselves as White British (52% compared with 42% overall). While the Enfield NR Area is more diverse than Enfield and London overall, it is less diverse than other neighbourhood renewal areas in the Upper Lee Valley (Table 3.3).

Table 3.3: Ethnic origin

Geographical Area	White	Non-white	Black or Black British	Asian or Asian British	Other
Enfield NR Area	60%	40%	24%	11%	5%
Enfield ⁶	77%	23%	-	-	-
London ⁷	71%	29%	-	-	-
England and Wales ⁸	91%	9%	-	-	-

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

- 3.8 The MORI survey indicates that, in the Enfield NR Area, for 23% of respondents English is not their main language. Of these, one-quarter are Turkish speakers. The other most widely-spoken languages are Bengali (11%), Greek (8%), Arabic (7%), Albanian (6%) and Gujarati (6%).

⁵ Figures for Enfield, Outer London and England and Wales from Census 2001

⁶ Census 2001

⁷ Census 2001

⁸ Census 2001

- 3.9 One in ten in the Neighbourhood Renewal Area have applied for refugee status. There are variations within the area, the highest proportion having applied is in Craig Park (18%), and the lowest is in Ponders End (3%).

Geographical Area	Have applied for refugee status
Angel Road	12%
Craig Park	18%
Latymer	8%
Ponders End	3%
St Peters	7%
Enfield NR Area	10%

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

- 3.10 In the Enfield NR Area, 42% of households do not possess a car or van (MORI 2002), which compares to 29% of households in Enfield as a whole, 29% of households in Outer London and 27% of households in England and Wales (Census 2001).

- 3.11 The Census 2001 examined the status of residents aged 16-74. For Enfield, this showed that just under 60% of residents were employed and 5.5% were unemployed. Three per cent were economically active as students, leaving nearly 35% that were economically inactive. Overall, the pattern of status in Enfield is not that different from London.

	Enfield	London	England and Wales
Employed	58.9%	60.2%	60.6%
Unemployed	4.1%	4.4%	3.4%
Long-term unemployed	1.4%	1.4%	1.0%
Student (economically active)	3.0%	3.0%	2.6%
Retired	11.2%	9.8%	13.6%
Student (economically inactive)	6.4%	6.6%	4.7%
Looking after home/family	7.4%	7.2%	6.5%
Permanently sick or disabled	4.6%	4.6%	5.5%
Other inactive	4.4%	4.3%	3.1%
Total inactive	34.0%	32.5%	33.4%

Source: Census 2001

Employment

- 3.12 The MORI survey indicates that 48% of people in the households that responded from the Enfield NR Area are in work, compared to 59% in Enfield and 61% nationally. Eight per cent are ILO unemployed, compared to 7% in the borough as a whole and 7% in London. Forty-four per cent are inactive (17% retired, 11% at home, 8% in full-time education and 4% long-term sick/disabled). There are variations within the Enfield NR Area with Angel Road, Craig Park and St Peter's having particularly high unemployment (Table 3.6).

Geographical area	Employed	ILO Unemployed	Unemployment Rate⁹
Angel Road	44%	11%	20%
Craig Park	45%	10%	18%
Latymer	52%	7%	12%
Ponders End	53%	4%	7%
St Peter's	47%	10%	18%
Enfield NR Area	48%	8%	14%

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

- 3.13 Of those not currently working, studying or retired, only one-tenth had had a job in the last year. One-quarter had never had a job and a further 55% had not had a job for over five years, indicating that a huge proportion are disengaged from the labour market (Table 3.7).

	%
Under one year	10%
One year to five years	18%
Over five years	35%
Over ten years	20%
Never had a job	25%
Don't know/can't remember/not stated	11%

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

- 3.14 The vast majority of people who are not working do not want to work. Of those not working that are of working age in the Enfield NR Area, only 20% are actually seeking work. The most likely to be looking for work are males (22%) and 16-24 year olds (24%).
- 3.15 The MORI survey asked those not working who were actually looking for work what the two or three main barriers to employment were. Nearly one-quarter (23%) said that there was nothing in particular stopping them from working. The most commonly-cited barriers were: skills and training (particularly needing to develop skills generally (16%), not having the right type of qualifications (12%) and not having the right type of experience (10%)) the lack of availability of suitable work (15%), discrimination on age (13%), childcare issues (12%) and being unable to find a job paying enough (9%).

Training and qualifications

- 3.16 In the Enfield NR Area, of those working age who responded to the MORI survey, 35% do not have any qualifications (compared to 15% in the borough of Enfield overall – Local Area Labour Force Survey 2001). Among the sub-groups, the young (16-44) and Black residents are most likely to have qualifications, whilst white residents and those aged over 45 are least likely to have them.

⁹ ILO unemployment rate is the number of people who are unemployed as a proportion of the resident economically active population.

- 3.17 In terms of the qualifications that are possessed, over half of residents with qualifications have GCSEs at grades A-C or equivalent 'O' Levels (54%). A further 22% hold GCSEs at grades D-G, and 7% have NVQ2 or an Intermediate GNVQ. The proportion of those with 'A' Levels is 21%, and 4% have NVQ3 or and Advanced GNVQ. The proportion with a degree is 16%.
- 3.18 Excluding full-time students, 19% of residents have taken part in education or training in the last year, and for 56% of these the training led to a full qualification or a credit towards a qualification (for 38% it led to a full qualification and for 18% it led to a credit).
- 3.19 Just over one-third (34%) of all residents said that they were interested in taking part in a (further) work-related training course. Nearly one-half of residents (46%) thought that there was no particular barrier preventing them from learning or studying things in the next year. The most commonly-cited barriers to learning were; not enough time (13%), being too old (11%), family/childcare commitments (10%) and work pressures (9%).
- 3.20 The MORI survey found that the most commonly-sought type of training is in IT/computing, with 46% of respondents interested in this. Other types of courses that people are interested in are; business skills/admin (17%), English language course (15%), caring for children (14%), health work e.g. nursing (12%), running a business (12%), community work (11%) and Foreign language courses (11%).
- 3.21 Interestingly, a lower proportion in the Enfield NR Area than nationally regularly think that they need to improve their basic skills, but a greater proportion regularly avoid situations that involve using basic skills (Table 3.8).

	Think need to improve basic skills		Avoid situations requiring basic skills	
	Enfield NR Area (%)	Great Britain (%) ¹⁰	Enfield NR Area (%)	Great Britain (%) ¹¹
Often/sometimes	22%	29%	11%	8%
Rarely/never	76%	70%	86%	91%

Source: MORI Neighbourhood Renewal Strategy for Enfield (2002)

¹⁰ MORI/Basic Skills Agency 1999

¹¹ MORI/Basic Skills Agency 1999

Summary

3.22 In Enfield:

- the wards in the Enfield NR Area are more ethnically diverse than Enfield as a whole, but less diverse than other neighbourhood renewal areas in the Upper Lee Valley; within the Enfield NR Area, there are small variations
- ILO unemployment in the borough as a whole is slightly below the level for London
- in the Enfield NR Area (five wards), ILO unemployment is only slightly above the borough level, but in three wards (Angel Park, Craig Road and St Peter's) it is noticeably above, whereas in Latymer and Ponders End it is the same or below the borough level
- of those not working in the Enfield NR Area, only 20% are actually seeking work – most commonly males (22%) and 16-24 year olds (24%)
- the most commonly-cited barriers to work (for those actually wanting to work) are; skills and training, not having the right experience, lack of suitable work, discrimination on age, childcare issues and jobs not paying enough (NB one-quarter said that there was nothing in particular stopping them to work)
- the most commonly-sought type of training in the Enfield NR Area is in IT/computing (46%) followed by; business skills/admin (17%), English language course (15%), caring for children (14%), health work e.g. nursing (12%), running a business (12%), community work (11%) and Foreign language courses (11%).
- the wards in the NR Area are more ethnically diverse than Enfield as a whole, but less diverse than other neighbourhood renewal areas in the Upper Lee Valley; within the Enfield NR Area, Latymer has a greater proportion of those that are white British, and Angel Road has a greater proportion of those that are Black or Black British residents.

4 Borough analysis - Haringey

Introduction

- 4.1 This section has benefited from the Haringey Strategic Partnership's publication, 'Narrowing the Gap – Neighbourhood Renewal Strategy', and three MORI surveys conducted in Seven Sisters NDC Area, Northumberland Park Joining Up Area (centred on Coleraine ward and including part of Park ward, with some overlap with Bruce Grove and High Cross) and West Green Learning Neighbourhood Area (including Bruce Grove, Green Lanes, Tottenham Central and West Green wards).

Deprivation

- 4.2 Nine of Haringey's 23 wards are in the 10% most deprived wards by the Indices of Multiple Deprivation (2000). These wards are; Coleraine, White Hart Lane, Park, Tottenham Central, Bruce Grove, High Cross, South Tottenham, Seven Sisters and Noel Park. A further five wards (West Green, Green Lanes, Woodside, Harringay and South Hornsey) are in the bottom 15% most deprived wards, and a further two (Hornsey Central and Bowes Park) are in the bottom 20%.
- 4.3 Geographically, Haringey is split between the deprived central and eastern parts of the borough and the more prosperous western parts.
- 4.4 'Narrowing the Gap – Neighbourhood Renewal Strategy' identifies and examines in more detail five priority areas in Haringey. These are:
- South Tottenham – east of the old Tottenham Central wards running into Seven Sisters wards
 - Northumberland Park – centred on Coleraine ward and including part of Park ward, with some overlap with Bruce Grove and High Cross
 - White Hart Lane ward
 - Wood Green town centre – centred on Noel Park ward and including parts of Woodside

- Mid-Tottenham – centred on Bruce Grove and High Cross wards and also including the Broadwater Farm Estate.

Population structure

- 4.5 Haringey and especially the Tottenham area¹² of the borough have become more ethnically diverse. According to the Annual Schools' Census 2002, in Haringey schools over one-half of pupils from BME communities speak English as an additional language. Black Caribbean and Black African communities are prevalent in the borough. Between the Censuses in 1991 and 2001, the non-white population of Haringey grew from 29% to 34%. For London overall, this growth was from 20% to 29%.

Table 4.1: Ethnicity in Haringey

	Haringey	London	England and Wales
White	66%	71%	91%
Non White	34%	29%	9%
Most common minorities	Black Caribbean 10% Black African 9% Indian 3%	Indian 6% Black African 5% Black Caribbean 5%	Indian 2% Pakistani 1% Black Caribbean 1%

Source: Census 2001

- 4.6 The priority areas in which MORI conducted surveys are ethnically more diverse with greater proportions of BME communities.

Table 4.2: Ethnicity within Haringey

	Seven Sisters NDC	Northumberland Park Area	West Green Area	Haringey
White	46%	40%	49%	66%
White British	26%	31%	27%	n/a
Non-White	54%	60%	51%	34%
Most common minorities	Black Caribbean 18% Black African 18%	Black Caribbean 21% Black African 13%	Black Caribbean 15% Black African 12%	Black Caribbean 10% Black African 9%

Source: MORI Surveys and Census 2001

- 4.7 The population in the borough is young. One-quarter of the population are 15-29, compared to 23% in London and 19% in the UK. Moreover, only 17% of the population are 55+ compared to 22% in London overall. Within the priority wards, the MORI surveys illustrate that the populations are even younger with high proportions of under 16s: Seven Sisters NDC Area (26%), Northumberland Park Area (28%) and West Green Area (22%).

¹² The Tottenham area contains the following 11 wards: Bruce Grove, Coleraine, Green Lanes, Harringay High Cross, Park, Seven Sisters, South Tottenham, Tottenham Central, West Green and White Hart Lane.

	Haringey	London	UK
0-14	19%	19%	19%
15-24	14%	13%	12%
25-34	22%	20%	15%
35-54	27%	28%	28%
55-64	8%	9%	11%
65-74	5%	6%	8%
75 and over	4%	7%	7%

Source: Census 2001

- 4.8 The MORI surveys show that the priority areas have high numbers of single parent families, particularly in the Northumberland Park Area (21% of households), but less so in Seven Sisters NDC Area (15%) and the West Green Area (16%). This compares to 7% nationally.
- 4.9 Around two-thirds of Haringey residents commute to work elsewhere (Haringey Strategic Partnership), and one-half of the jobs in the borough are taken by people commuting in (Haringey Council: Haringey City Growth Strategy).
- 4.10 The borough of Haringey has good accessibility to the City and West End, and also for employment opportunities in the Cambridge Corridor and Stansted Airport. However, parts of the north of the borough, especially White Hart Lane, have very poor access due to a lack of public transport.
- 4.11 The Census 2001 examined the status of residents aged 16-74. For Haringey, this showed that just over 55% of residents were employed and 7.7% were unemployed. Economically active students made up 3.5% of the 16-74 population, leaving nearly 35% that were economically inactive.

	Haringey	London	England and Wales
Employed	56.1%	60.2%	60.6%
Unemployed	5.8%	4.4%	3.4%
Long-term unemployed	1.9%	1.4%	1.0%
Student (economically active)	3.5%	3.0%	2.6%
Retired	8.1%	9.8%	13.6%
Student (economically inactive)	8.2%	6.6%	4.7%
Looking after home/family	7.2%	7.2%	6.5%
Permanently sick or disabled	5.2%	4.6%	5.5%
Other inactive	5.8%	4.3%	3.1%
Total inactive	34.5%	32.5%	33.4%

Source: Census 2001

Businesses

- 4.12 Business start-ups have been steady over the last five years (between 900 and 1,050), though they have been partly offset by de-registrations (between 650 and 850). The stock of businesses has grown by 6% between the start of 1999 and the start of 2002 compared to 4%

for London overall (ONS). In a recent survey, 82% of businesses held a negative view of Haringey as a place to do business competitively. Moreover, two-thirds of newly established BME businesses fail within the first three years.

- 4.13 Contrary to this lack of confidence in the borough, an employers' survey carried out by PACEC on behalf of Haringey Council found that 86% of responding firms wanted to remain in Haringey. The most likely industries where firms wanted to relocate outside of the borough were general manufacturing (26% of respondents wanted to relocate) and business and professional services (22%). Backing up this relatively positive outlook, the overall objective for 51% of firms was to grow, and 27% want to stay the same or consolidate. Four per cent of firms want to contract and for 17% the overall objective was to survive. A significantly higher proportion (at 95% level) in general manufacturing (12%) want to contract, and a significantly higher proportion in food (29%) have the overall objective of merely surviving (source: PACEC survey).
- 4.14 The main constraints on businesses were recognised as access to premises/transport, cost of premises, increasing competition, other costs, lack of external business support and advice and in the ICT sector a lack of IT skills and support (source PACEC).
- 4.15 Most (92%) of the 7,700 businesses (excluding public sector organisations) in the borough employ less than 24 people, accounting for 40% of the total employment in the borough. The largest sectors by industry in the borough are retail trade, manufacturing, other business activities and the public sector. (Source: Haringey Strategic Partnership).
- 4.16 Over half (57%) of the responding firms to PACEC's survey were said to be owned by people of black or minority ethnic origin, especially in the food sector (77%). Around half of the businesses in general manufacture, wholesale/retail, clothing and ICT were owned by ethnic minorities. Ethnic minorities were least likely to run businesses in business and financial services or in creative and cultural industries (source PACEC).

Employment

- 4.17 The decline of the manufacturing sector in the Lee Valley has meant that the major source of local employment for residents in the east and centre of the borough has been greatly reduced. New jobs, both locally in public services, and in the City and West End tend to require skills such as customer care skills and/or a high level of formal qualifications ('Narrowing the Gap'). These do not, therefore, suit the manufacturing labour force i.e. the unemployed who worked in manufacturing are occupationally immobile.

4.18 Unemployment in terms of the percentage claimant count of the economically active population varies quite noticeably across the borough. For example, in Park and Coleraine the figures are 13.6% and 12.5% respectively. Four other wards (White Hart Lane, High Cross, Seven Sisters and Bruce Grove) have figures above 10%, and for Tottenham Central the figure is just under 10%. Interestingly, two of the three wards for which the figures are the lowest have particularly high numbers of income support claimants who are working age lone parents – that is Noel Park and Bowes Park. Tottenham Central and Coleraine have high percentages of those on income support who are working age lone parents and of those who are unemployment claimants of working age population aged over 50 (Table 4.5).

Table 4.5: Employment indicators for Haringey

Geographical Area	% claimant count of economically active population (ONS & GLA figures for April 2002)	% income support claimant count of working age population who are lone parents	% claimant count of working age population aged over 50
Haringey borough			
baseline	7.4	5.3	4.5
Bowes Park	5.8	11.1	6.4
Bruce Grove	10.7	6.1	8.7
Coleraine	12.5	8.9	10.8
High Cross	11.1	4.3	4.7
Noel Park	6.8	11.5	4.7
Park	13.6	4.7	4.6
Seven Sisters	11.1	7.5	5.6
Tottenham Central	9.9	9.9	9.5
White Hart Lane	11.2	5.3	4.3
Woodside	6.3	5.0	5.0

Source: Haringey Strategic Partnership: 'Narrowing the Gap – Neighbourhood Renewal Strategy'

NB There is no data for South Tottenham ward

4.19 The MORI surveys also provide useful comparators between priority areas within the borough and the borough overall in terms of employment, unemployment and activity. This shows that there is particularly high unemployment amongst the respondents to the MORI survey in the Northumberland Park Area of Haringey.

Table 4.6: Employment status

	Seven Sisters NDC	Northumberland Park Area	West Green Area	Haringey
Employed	48%	44%	50%	56%
ILO Unemployed	9%	19%	8%	11%
ILO Unemployment Rate	16%	30%	14%	17%
Active	57%	63%	59%	65%
Inactive	43%	32%	39%	35%

Source: MORI Surveys, Census 2001, Local Area Labour Force Survey 2001

4.20 Of those not working, there is a problem that people do not actually want to work, or that they are not really looking for work. The MORI surveys asked those not working these two questions. The most likely to *want work* in Northumberland Park are those under 34 (51%), residents in families with children (44%) and those with qualifications (50%). Those most

likely to be *looking for work* are those under 34 (34%), those with qualifications (34%) and residents in two parent families (32%). Single parents are one of the most likely to want work, but not one of the most likely to be looking for work. In West Green, the groups most likely to be looking for work are one and two parent families (32% and 37% respectively).

	Seven Sisters NDC	Northumberland Park Area	West Green Area
Wish to work	n/a	25%	34%
Looking for work	13%	17%	19%

Source: MORI Surveys

4.21 The Haringey Strategic Partnership’s publication, ‘Narrowing the Gap’, provides some thoughts, stemming from the views from Haringey’s residents, in terms of what the barriers to employment are. The main barriers are:

- language – lack of basic English language skills is a barrier to succeeding at interviews and in accessing employment
- lack of qualifications or lack of the recognised qualifications needed to access professional work
- labour market – individuals do not know how it works or do not know the functions of labour market intermediaries e.g. Jobcentre Plus
- transport – newly settled communities are often cautious about travelling outside their neighbourhoods, perhaps because family and other support structures are based in local neighbourhoods
- transport costs – those relying on benefits are unwilling to pay for public transport costs to access services or employment too far away from home, which restricts the amount of opportunities available
- local wages are too low to compensate for the high cost of living making parents better off just claiming benefit
- childcare – lack of facilities at work or training centres
- lack of appeal – jobs on offer are unattractive (especially for young people); training schemes available fail to give people access to more interesting and higher paid work.

- 4.22 The publication also gives some thoughts of residents of the South Tottenham priority area as to what barriers to employment, training and enterprise opportunities are. The barriers cited are; affordable childcare, problems with English, lack of qualifications and most importantly poor basic skills (19% have problems with literacy and numeracy).
- 4.23 In the Seven Sisters NDC Area 9% are not working and seeking work, a further 15% are at home and not seeking work, 5% are long-term sick/disabled, 16% are retired (MORI Survey). There is also an issue of long-term unemployment. In the Seven Sisters NDC Area 53% of those registered unemployed had been for more than 6 months, and of those who had had spells of unemployment in the last five years, for 70% at least one of these spells had lasted for 6 months or more (MORI Survey). Therefore, there is an issue of disengagement from the labour market in terms of inactivity and a lack of motivation, and in terms of long-term unemployment which erodes basic job skills.
- 4.24 The MORI surveys indicate what those looking for work thought the main barriers to employment were. In the Seven Sisters NDC, skills, experience and qualifications are commonly cited as barriers to employment. A lack of suitable jobs is also commonly mentioned as a barrier to finding work in Seven Sisters NDC and West Green, but not in Northumberland Park. Childcare issues are rarely cited as a barrier to work in Seven Sisters NDC, but are particularly common as a reason in Northumberland Park.

Table 4.8: Barriers to employment

	Seven Sisters NDC	Northumberland Park area	West Green area
Do not have sufficient skills and experience	19%	n/a	n/a
Do not have the right skills and experience	12%	n/a	n/a
Do not have sufficient qualifications	7%	n/a	n/a
Do not have the right qualifications	13%	19%	9%
Need to develop skills generally	n/a	4%	9%
Poor literacy/numeracy	n/a	7%	5%
Childcare not available	4%	21%	7%
Language difficulties	6%	8%	6%
Pay too low	5%	8%	7%
No jobs available	8%	n/a	n/a
No suitable jobs available	21%	2%	11%
Too little information on what is available	14%	2%	0%
Other reasons	19%	5%	31%
No reason	7%	8%	8%

Source: MORI Surveys

- 4.25 Language difficulties are not one of the most common reasons why residents cannot find work, but this may hide the real issue that those with language problems are not seeking work. Although we have not data on whether those with language problems are seeking work or not, we do have evidence that there are large numbers of people with English language difficulties. In Seven Sisters NDC, for 35% of residents, English is not the first language. In the Northumberland Park Area the figure is 20%, and in the West Green Area it is 30%. In

Seven Sisters NDC, of those who do not speak English as their first language, 30% speak English only slightly or not at all.

- 4.26 The differences in the reference to childcare may be related to the household composition in the respective areas. The Northumberland Park Area, where childcare issues are cited as a barrier to work by more residents has a larger proportion (21% of households) of single parent families.

Table 4.8: Household composition

	Seven Sisters NDC	Northumberland Park area	West Green area	Haringey ¹³	National ¹⁴
Married/cohabiting couple with no dependent children	15%	18%	22%	32%	37%
Married/cohabiting couple with dependent children	16%	17%	18%		22%
Single parent family	15%	21%	16%	14%	7%
Single person household	40%	31%	25%	36%	28%
Other multi-person household	14%	13%	16%	18%	7%

Source: MORI Surveys

- 4.27 In the Northumberland Park Area, of those looking for work 30% said that affordable childcare would be most likely to help them into work. This was followed by having the right experience (27%), having the right skills/qualifications (23%), improved English speaking (22%) and advice on interviews/writing application forms (20%).

- 4.28 The MORI Surveys for the Northumberland Park and West Green Areas asked residents who were looking for work what support they would like to receive. The results show that careers guidance and advice on jobs, interview skills coaching and help with confidence building are commonly desired by those looking for work in both areas.

Table 4.10: What support would you like to receive?

	Northumberland Park area	West Green area
Careers guidance/advice on jobs	38%	35%
Interview skills coaching	23%	24%
Help with application forms	22%	10%
Help with confidence building	22%	21%
Help with CV preparation	21%	11%
Advice on how to present yourself	17%	19%
Help with becoming self-employed	n/a	11%
None of these	20%	32%
Don't know	2%	2%

Source: MORI Surveys

¹³ Census 2001

¹⁴ Survey of English Housing 2001/02

Training and qualifications

4.29 ‘Narrowing the gap’ provides some interesting insights into the subject of education and training in the borough of Haringey:

- lack of English is a major barrier to employment for many refugees, and this problem is not helped by the fact that ESOL courses are not sufficiently differentiated to meet need
- need to address the alienation of ethnic minority children from the education system
- childcare and early education are key priorities
- schools in target wards have lower than average attainment levels at all key stages as well as higher levels of transience
- after-school activities for children are needed e.g. sports and music and arts activities

4.30 Poorer education in the priority wards is illustrated by the low figures for attainment of level 4 or above at key stage 2. The nine most deprived wards (emboldened in table 1.21) are all in the bottom ten Haringey wards for attainment of level 4 or above at key stage 2. Particularly poor performers are White Hart Lane, Park, Coleraine and High Cross.

Table 4.10: Education in Haringey – attainment of level 4 or above at key stage 2 in wards in most deprived 20% wards in England by IMD 2000

Geographical area	% attaining at least level 4 at key stage 2
Haringey borough baseline	63%
Bowes Park	67%
Bruce Grove	56%
Coleraine	51%
Green Lanes	64%
Harringay	64%
High Cross	51%
Hornsey Central	64%
Noel Park	61%
Park	50%
Seven Sisters	59%
South Hornsey	58%
South Tottenham	62%
Tottenham Central	57%
West Green	62%
White Hart Lane	49%
Woodside	66%

Source: Oxford University (1998)

4.31 ‘Narrowing the gap’ indicates that in the south Tottenham area, which includes the Tottenham Central ward and runs into the Seven Sisters ward, one-third of residents have no qualifications, 15% have literacy problems and only 42% were satisfied with their education

at secondary school. Information from a variety of other sources produces similar results for the proportion of residents with no qualifications. The West Green area has the lowest proportion of working age residents with no qualifications (27%), but this is still significantly higher than Haringey overall (19%).

Table 4.11: Percentage of working age with no qualifications

Geographical Area	%
Haringey borough baseline ¹⁵	19
Northumberland Park	36
Seven Sisters NDC Area	35
South Tottenham Area	33
West Green Area	27

Source: Haringey Strategic Partnership: 'Narrowing the Gap – Neighbourhood Renewal Strategy'; MORI Surveys

- 4.32 In terms of basic skills, there are large numbers of residents in the priority areas who admit that they have problems with basic skills. Just over one-fifth of respondents to the MORI survey in the West Green Area said that they had problems with basic skills, and 16% in the Northumberland Park Area said that they did.

Table 4.12: Respondents who have problems with basic skills

	Northumberland Park Area	West Green Area
Any problem	16%	21%
Spelling	12%	14%
Writing English	10%	12%
Reading English	9%	9%
Speaking English	7%	10%
Numbers/basic arithmetic	7%	3%

Source: MORI Surveys

- 4.33 Lack of motivation is shown by the numbers interested in taking part in further work-related learning (26% of residents in Northumberland Park and 39% in West Green). The MORI Surveys asked those interested in training what types of courses they would like to take part in. As is often the case in these surveys, the most popular course desired is in IT/computing (42% in Northumberland Park and 47% in West Green). Other popular courses are in business administration (15% and 17%), running your own business (14% for both areas) and caring for children (20% and 11%). Language courses are also of interest in West Green (14% want to study a foreign language and 11% are interested in English language courses).

¹⁵ Local Area Labour Force Survey, 2001

Summary

4.34 The above information on Haringey highlights a number of points:

- ethnically diverse borough, and the diversity is increasing
- borough is geographically split between the deprived centre and east and the relatively prosperous west
- two-thirds of the borough's population commute to work elsewhere, and one-half of the jobs in the borough are taken by people commuting in
- evidence that business outlook is fairly optimistic (except in general manufacture and to an extent in food) and the business stock has been growing (though still large numbers of failures)
- the main constraints on businesses were recognised as access to premises/transport, cost of premises, increasing competition, other costs, lack of external business support and advice and in the ICT sector a lack of IT skills and support
- majority of businesses owned by people of black and ethnic origin
- high unemployment in the borough as a whole and even higher in most of the 20% most deprived wards; long-term unemployment is noticeably high for the borough as a whole
- barriers to employment noted as; language, lack of qualifications, lack of knowledge of how the labour market and its intermediaries work, unwillingness for people to leave their communities to work, transport costs, low wages, childcare issues and lack of appeal of jobs
- large proportions of people in NR Areas with no qualifications.

5 Borough analysis - Waltham Forest

Deprivation

- 5.1 Four of Waltham Forest's 20 wards are in the 10% most deprived wards by the Indices of Multiple Deprivation (2000). These are the four priority wards and are; Leyton, Higham Hill, Cathall and Cann Hall. Two further wards (Hoe Street and St. James Street) are in the 15% most deprived wards.
- 5.2 There is a geographical split in the borough. The southern and central parts of the borough suffer the most deprivation. This area contains two-thirds of the borough's population and has many problems characterising inner-city areas, for example high unemployment (London Borough of Waltham Forest: Economic Update Report, March 2002).

Population structure

- 5.3 The age structure of the population of Waltham Forest is almost identical to that of London as a whole, and is therefore a young population. One-fifth (20%) are 0-14, and a further 23% are 15-29 (Census 2001).

Table 5.1: Population age structure

	Waltham Forest	London	UK
0-14	20%	19%	19%
15-24	13%	13%	12%
25-34	20%	20%	15%
35-54	27%	28%	28%
55-64	8%	9%	11%
65-74	6%	6%	8%
75 and over	6%	7%	7%

Source: Census 2001

- 5.4 There are large Pakistani and Black Caribbean communities in Waltham Forest. Like all boroughs on London, the diversity has been increasing. Between the Censuses of 1991 and 2001, the non-white population of Waltham Forest grew markedly from 26% to 36%.

Table 5.2: Ethnicity in Waltham Forest

	Waltham Forest	London	England and Wales
White	64%	71%	91%
Non White	36%	29%	9%
Most common minorities	Black Caribbean 8%	Indian 6%	Indian 2%
	Pakistani 8%	Black African 5%	Pakistani 1%
	Black African 6%	Black Caribbean 5%	Black Caribbean 1%

Source: Census 2001

- 5.5 The change in business stock from the start of 1999 to the start of 2002 shows that the growth in the number of businesses is negligible (0.9%). In the last two years registrations of VAT registered businesses totalled 1,335, but deregistrations totalled 1,310 (source: ONS).
- 5.6 The Census 2001 examined the status of residents aged 16-74. For Waltham Forest, this showed that just under 60% of residents were employed and 6.5% were unemployed. Just over 3% were economically active as students, leaving over 30% that were economically inactive.

Table 5.3: Status of residents

	Waltham Forest	London	England and Wales
Employed	58.9%	60.2%	60.6%
Unemployed	4.9%	4.4%	3.4%
Long-term unemployed	1.6%	1.4%	1.0%
Student (economically active)	3.2%	3.0%	2.6%
Retired	9.4%	9.8%	13.6%
Student (economically inactive)	6.0%	6.6%	4.7%
Looking after home/family	7.6%	7.2%	6.5%
Permanently sick or disabled	5.0%	4.6%	5.5%
Other inactive	4.8%	4.3%	3.1%
Total inactive	32.8%	32.5%	33.4%

Source: Census 2001

Employment

- 5.7 Waltham Forest's unemployment rate (5.4%) is above that for Greater London (4.8%) and Great Britain (3.7%)¹⁶. Within the borough, unemployment is disproportionately higher amongst wards in the south, with Hoe Street (8.6%) and Lee Bridge (7.6%) having the highest rates. Seven wards (Chingford Green, Endlebury, Valley, Larkwood, Hatch Lane, Chapel End and Hale End) of the eight most northerly ones have the lowest unemployment rates in the borough, and rates that are below the London average (ONS/GLA Research Section, January 2001). Only Higham Hill from the north of the borough has an unemployment rate equivalent to the wards in the southern half.

¹⁶ Source: ONS/GLA Research Section January 2001

Table 5.4: Unemployment rates by ward and gender

	Males	Females	All
Cann Hall	9.7	4.0	7.2
Cathall	7.5	3.4	5.7
Chapel End	5.6	2.3	4.2
Chingford Green	2.8	2.2	2.6
Endlebury	2.6	1.7	2.2
Forest	7.1	2.7	5.2
Grove Green	8.4	4.5	6.7
Hale End	4.8	2.7	3.9
Hatch Lane	4.6	2.2	3.6
Higham Hill	8.8	4.7	7.1
High Street	7.7	4.0	6.1
Hoe Street	11.6	4.9	8.6
Larkswood	4.6	2.2	3.6
Lee Bridge	10.4	4.0	7.6
Leyton	9.8	4.2	7.4
Leytonstone	6.1	2.3	4.5
Lloyd Park	7.2	3.1	5.4
St James Street	8.7	4.2	6.8
Valley	4.0	2.2	3.3
Wood Street	8.4	4.2	6.6
Waltham Forest borough	7.1	3.3	5.4

Source: ONS/GLA Research Section, January 2001

- 5.8 Some of the wards display a huge youth unemployment problem, particularly Lee Bridge, where the unemployment rate for 16-19 year olds is 14.9% and for 20-24 year olds is 9.1%, and Cann Hall and Grove Green, where unemployment rates amongst young people are similarly high.

Table 5.5: Unemployment rates by ward and age

	16-19	20-24	25-34	35-44	45-54	55-59	60+	All
Cann Hall	13.6	7.1	7.4	8.2	5.2	4.9	5.2	7.2
Cathall	10.1	6.1	4.7	7.1	5.6	5.7	1.0	5.7
Chapel End	5.6	6.1	3.7	4.5	3.1	6.0	0.4	4.2
Chingford Green	3.2	4.0	3.1	2.5	2.0	3.1	0.2	2.6
Endlebury	0.8	2.5	3.5	1.8	2.1	3.0	0.4	2.2
Forest	6.9	5.8	5.7	4.9	4.9	4.7	0.4	5.2
Grove Green	12.4	7.7	6.3	7.6	6.0	5.7	0.4	6.7
Hale End	7.7	3.7	4.4	4.2	2.6	4.5	0.8	3.9
Hatch Lane	3.8	4.2	4.7	3.1	3.7	4.1	0.5	3.6
Higham Hill	10.4	7.1	6.8	8.3	5.3	8.4	2.4	7.1
High Street	5.1	6.6	5.0	8.9	6.5	6.9	0.4	6.1
Hoe Street	11.8	7.6	9.1	10.7	8.0	6.8	0.7	8.6
Larkswood	5.0	3.4	3.9	3.3	3.4	4.2	1.9	3.6
Lee Bridge	14.9	9.1	6.9	9.4	6.0	5.5	1.1	7.6
Leyton	8.7	7.2	7.5	9.9	6.1	5.9	1.1	7.4
Leytonstone	7.7	4.6	3.9	4.5	5.5	5.4	1.2	4.5
Lloyd Park	7.4	4.3	4.6	8.0	6.3	5.3	0.7	5.4
St James Street	7.2	6.5	7.2	7.4	6.7	6.3	1.1	6.8
Valley	5.2	3.7	2.8	4.2	2.7	2.6	1.0	3.3
Wood Street	8.9	6.7	6.9	6.9	8.0	4.2	0.3	6.6
Waltham Forest borough	8.9	6.7	6.9	6.9	8.0	4.2	0.3	5.4

Source: ONS/GLA Research Section, January 2001

- 5.9 In Waltham Forest, just under one-third of employment is part-time. This is above the average for London overall, where under one-quarter of employment is part-time. In three of

the four priority wards in Waltham Forest the proportion working part-time is above the proportion for the borough as a whole. In two of the wards (Higham Hill and Leyton) there has been a massive increase in the proportion employed part-time.

Table 5.6: Part-time and full-time employment

	Cann Hall	Cathall	Higham Hill	Leyton	Waltham Forest	London
% working full-time 1996	62.0	68.6	94.4	79.0	69.2	75.4
% working full-time 2000	68.6	60.6	62.5	47.5	68.0	76.4
% working part-time 1996	38.1	31.6	5.6	21.1	30.8	24.7
% working part-time 2000	31.4	39.4	37.5	52.5	32.0	23.6

Source: Annual Business Inquiry

Training and qualifications

- 5.10 The four priority wards in the borough have all got noticeably higher proportions of the working age population with very low numeracy and literacy skills than the borough as a whole. Cathall and Leyton have got particularly high percentages for both poor numeracy and poor literacy. Higham Hill has got a particularly high percentage with poor numeracy.

Table 5.7: % of working age population with very low numeracy and literacy for 4 priority wards in Waltham Forest

	% with very low numeracy	% with very low literacy
Cann Hall	6.5%	6.0%
Cathall	8.2%	8.2%
Higham Hill	8.4%	6.4%
Leyton	7.7%	7.5%
Waltham Forest	5.4%	4.5%
England	5.0%	4.0%

Source: Basic Skills Agency (2001)

Summary

- 5.11 Waltham Forest can be described as follows:

- ethnically diverse borough, and the diversity has increased significantly over the last decade
- unemployment in the borough is above the London level, and for the southern wards within the borough the unemployment problem is marked
- the growth in business stock has been almost negligible in the last few years
- Waltham Forest as a whole has a larger proportion of employment that is part-time than London as a whole, and for three of the four priority wards this is even higher
- in the four priority wards, there are very low literacy and numeracy skills.

6 Existing provision

Introduction

- 6.1 There is already considerable public funding going in to support and develop the labour market potential of residents in the three boroughs. Understanding this context is important in shaping any future interventions. This chapter analyses a mapping of current provision by Urban Futures, describing the scale and nature of this activity.

Scale and location of spending

- 6.2 The information collected highlights that a very large amount of activity is already taking place – in excess of 250 projects and programmes. More detailed figures are available for 170 of these activities, which corresponds to £39.6m of expenditure over the last year. It appears that this data covers most of the major expenditure, with two exceptions. The first is Jobcentre Plus' North East District, which spends roughly £4m per annum on programmes in Waltham Forest. Secondly, we are unable yet to accurately disaggregate much of the post-16 learning and skills spending. However, the LSC has made an early estimate that just over £32m of its services (including school sixth forms) is directed into the Objective 2 priority wards in the 3 Boroughs. Therefore, *total public sector spend is in excess of £70m.*
- 6.3 The data on where within the boroughs this money is spent is not clear. However, the strong impression from the figures is of a concentration in Haringey and Waltham Forest. The LSC data is already identified against the disadvantaged Wards which are mainly in these two Boroughs whilst Jobcentre Plus, ESF and SRB spending is drawn to the areas in which specific beneficiaries are located.
- 6.4 One noticeable difference between the two Boroughs is the difference in the number of projects which generate this spend. Waltham Forest's total is made up of several very large amounts whereas the expenditure in Haringey is spread across a much larger number of smaller projects.

Table 6.1: Current expenditure, by area

All 3	1	392,000
Enfield	6	1,128,223
Haringey	84	8,870,541
Haringey/Enfield*	2	9,669,878
London	1	50,000
London North LSC area	15	2,081,783
North East London	1	206,500
North London	8	1,705,427
Unknown	27	3,779,537
Waltham Forest	24	11,755,058
Total	169	39,639,378

Source: derived from Urban Futures

Note: JC+ NE London and LSC not included

* The two projects account for just over £100,000. Most of this expenditure comes through JC+ funding streams

Type of activity

6.5 The expenditure provides a wide range of activities, with most money going in to:

- Developing job readiness
- Skills development
- Business support

6.6 Reflecting on the characteristics of the non-employed economically inactive population, fundamental work orientation services – such as attitude, motivation and job readiness – seem to be comparatively under-supported as are outreach services.

Table 6.2: Spend by type of activity

	Number of projects	Spend	% of all non-JC+ spend
A/AS Levels, GCSEs and other level 2 & 3s	11	1,233,781	4%
Attitude, job readiness & motivation	10	1,354,773	5%
Employment incentives	1	300,000	1%
Family care support services (e.g. childcare)	10	2,058,499	7%
Generic job readiness/ Basic Skills (literacy, numeracy, English language)	29	4,500,597	15%
Job search, CV writing and interview coaching	3	1,060,176	4%
Job specific skills	26	4,204,981	14%
Business support	3	3,198,009	11%
Information services	9	2,523,791	8%
Outreach	9	1,122,142	4%
Race equality/gender positive action projects	19	2,812,449	9%
Support for incapacity claimants, disabled and people with other health problems	4	349,500	1%
Support services for substance users/ex-offenders	4	863,135	3%
Other	27	3,965,886	13%
Unknown	4	529,850	2%
JC+ provision		9,561,809	n/a
Total	169	39,639,378	

Source: derived from Urban Futures
Note: JC+ NE London not included; LSC not included
* JC+ includes New Deal and Work-Based Learning for Adults

Beneficiaries

6.7 The analysis of numbers of beneficiaries suggests a disproportionate weighting towards Waltham Forest which is curious given the overall population balance. This requires some further immediate enquiry.

Table 6.4: beneficiaries by location

	No. of responses	No. of beneficiaries for responses	Total (grossed up) beneficiaries
All 3	1	25	25
Enfield	2	185	276
Haringey	36	2,007	3,297
Haringey/Enfield	2	58	58
London	0	0	33
London North LSC area	3	350	1,447
North East London	0	0	135
North London	0	0	1,117
Unknown	10	416	1,541
Waltham Forest	17	8,555	11,270
(blank)	0	0	6,262
Grand Total	71	11,596	25,461

Note: figures grossed-up based on spend per beneficiary per area

6.8 Table 6.5 presents information on the estimated number of beneficiaries. It is likely that there is double counting within the overall figure, as people avail of more than one intervention. Therefore, the actual number reach is likely to be significantly lower than suggested. The large other category includes information services (which drew 40% of the budget) and business support activities (30%).

	No. of responses	No. of beneficiaries for responses	Total (grossed up) beneficiaries
A/AS Levels, GCSEs and other level 2 & 3s	0	0	808
Attitude, job readiness & motivation	1	30	203
Employment incentives	0	0	196
Family care support services (e.g. childcare)	5	81	100
Generic job readiness/ Basic Skills (literacy, numeracy, English language)	13	1,093	2,929
Job search, CV writing and interview coaching	2	455	533
Job specific skills	20	1,325	1,793
Other	12	7,213	12,780
Race equality/gender positive action projects	14	1,097	1,222
Support for incapacity claimants, the disabled and people with other health problems	2	182	259
Support services for substance users/ex-offenders	2	120	155
Unknown	0	0	347
JC+ North			6,262
Grand Total	71	11,596	27,587

Note: figures grossed-up based on spend per beneficiary per area

7 Changes over time

Introduction

- 7.1 This section examines the dynamics of the labour market. Many interventions are targeted on disadvantaged groups. However, the unemployment problem is persistent. By considering the dynamics of the labour market we can look at two hypotheses to try to explain why this is the case.
- 7.2 Firstly, local population churn may mean that a group of people move into employment and then leave the area, with vacant housing being filled by those facing disadvantage. To examine this hypothesis, migration statistics for the three London boroughs are compared to other London boroughs and London overall.
- 7.3 The second hypothesis is employment churn. Intervention in the labour market may create jobs for some individuals at the expense of employing others, or may get people into jobs that they do not hold on to. Continued intervention can therefore result in the cycle of people entering and leaving employment. Some limited assessment of this issue is possible through the on- and off-flows in the claimant count.
- 7.4 A further issue regarding employment churn is the large-scale commuting that takes place across areas. Creation of employment in the Upper Lee Valley area may not benefit local residents as it may be those from neighbouring areas who fill those jobs. This may be particularly so of neighbouring areas that are more prosperous and so are inhabited by residents with higher levels of employment related characteristics. If this were occurring local job creation would have to be at a much higher level than the scale of the local unemployment problem.

Local population churn

- 7.5 Migration data from Census 2001 suggests that a number of people in Haringey have been leaving the borough each year. The outflow figures are particularly high in comparison to the other two borough in the ULV area. However, the figures are consistent with the inner London average (Table 7.1). Those moving out may be people who have found employment and subsequently left the local area. This leaves the unemployment problem in the borough, especially if the people coming in are from disadvantaged groups.

- 7.6 Data from the mid-year population estimates, which are derived largely from GP records, suggests that the problem is on a larger scale (Table 7.2). These suggest very high out-flows. Indeed, net out-migration has been amongst the highest of any London borough.
- 7.7 The OFSTED report for Haringey makes reference to the high rates of movement within the borough. Overall 29% of pupils change schools at times which differ from the usual points of transfer. The rates range from 3 to 71% for individual schools. It also reports that Haringey makes the largest use of temporary accommodation (4,667) households of any London Borough. This adds weight to the idea of people moving in to the area when they are facing difficulties.
- 7.8 Haringey is also the destination for more refugees and asylum seekers than any other Borough in London. At the most recent date, the Borough supported 10% of London's total number of destitute Asylum Seekers – and this is a trend that has been broadly consistent for over 5 years. Based on Home Office data, we estimate that there has been a gross inflow since 1985, of just over 30,000 refugees and asylum seekers have arrived and settled in Haringey. Of these a proportion will have subsequently left the Borough. While this total number is significant, it accounts for just 10% (approximately) of the annual inflow to the Borough.
- 7.9 A similar pattern of population churn occurs in Waltham Forest, but the extent is not so marked as in Haringey. Outflow as a percentage of population tends to be only slightly above the average for outer London boroughs. Nevertheless, it may be the case that the people leaving have found unemployment, and those entering may be from disadvantaged groups. There has been a fairly large net outflow in Waltham Forest in comparison to the outer London average in the last few years.
- 7.10 Enfield has a more balanced pattern of migration. Firstly, the inflow and outflow figures tend to be around the outer London borough average. Secondly, the inflow and outflow figures tend to be close year after year. The result is that those leaving the borough tend to be replaced by those coming in. This does not rule out the possibility of population churn as we discussed earlier though. Although the figures approximate to London averages, unless we can determine who exactly is leaving and coming in, we cannot rule out population churn. A further issue is that population change has worsened in the borough. In 1998-1999, inflow and outflow figures were comfortably below the outer London average, but in 2000-2001 the inflow figure was above the outer London average and the outflow figure the same as the average.

	% of population moving into area	% of population moving out of area	Net inflow (as % of population)
Haringey	9.8	9.4	0.4
Average of Inner London Boroughs	11.3	9.4	2.0
Enfield	5.4	5.4	0.0
Waltham Forest	6.4	6.2	0.2
Average of Outer London Boroughs	6.4	5.8	0.6
Average of London Boroughs	8.5	7.3	1.2

Source: Census 2001

Area	2000-2001			1999-2000			1998-1999		
	Inflo w as % popn	Outflow as % popn	Net as % popn	Inflo w as % popn	Outflow as % popn	Net as % popn	Inflo w as % popn	Outflow as % popn	Net as % popn
Haringey	7.1	9.8	-2.7	7.1	9.6	-2.6	7.4	9.1	-1.7
Inner London avge	7.2	8.6	-1.4	7.3	8.7	-1.4	7.5	8.8	-1.4
Enfield	5.6	6.1	-0.6	5.5	5.8	-0.3	5.2	5.7	-0.5
Waltham Forest	5.0	6.4	-1.5	4.8	6.5	-1.6	4.8	6.4	-1.6
Outer London avge	5.4	6.1	-0.7	5.5	6.3	-0.7	5.6	6.2	-0.6
London avge	6.1	7.0	-1.0	6.2	7.3	-1.0	6.4	7.2	-0.9

Source: ONS using local migration data and mid-year population estimates

7.11 Haringey Council's "Haringey City Growth Strategy" indicates migration by age group. Their data shows that there is greater outward migration for those aged above 30 than in London as a whole. There is significant inward migration for people aged 20-24 and to a lesser extent those aged 25-29.

	% change in population over and above natural changes		
	Haringey	North London	London
0-4	2%	-2%	-2%
5-14	-9%	-4%	-4%
15-19	2%	1%	3%
20-24	58%	37%	44%
25-29	33%	22%	28%
30-59	-4%	-1%	-1%
60+	-6%	-3%	-4%
Total	1%	2%	2%

Source: Haringey Council: "Haringey City Growth Strategy"

Employment churn

- 7.12 Job churn within the local economy can be examined through looking at on- and off-flows to the claimant count. Haringey has relatively low (and stable) on- and off-flows, suggesting that employment churn within the local economy itself may not be particularly high – certainly no higher than in other inner London boroughs.

Table 7.4: On- and off-flows as % of claimant stock

Area	Off-flows as % of stock				On-flows as % of stock			
	Mar 02	Jun 02	Sep 02	Dec 02	Mar 02	Jun 02	Sep 02	Dec 02
Camden	13%	15%	14%	17%	13%	16%	16%	16%
City	12%	12%	7%	19%	17%	14%	13%	11%
Hackney	14%	16%	17%	19%	14%	17%	18%	18%
Hammersmith & Fulham	13%	16%	16%	18%	14%	17%	17%	17%
Haringey	13%	14%	15%	17%	15%	15%	16%	16%
Islington	12%	15%	16%	19%	13%	15%	15%	16%
Kensington & Chelsea	13%	15%	15%	18%	13%	17%	16%	18%
Lambeth	11%	16%	14%	17%	13%	16%	15%	16%
Lewisham	11%	15%	17%	19%	13%	15%	18%	17%
Newham	13%	17%	15%	19%	15%	18%	18%	17%
Southwark	12%	14%	14%	16%	13%	15%	15%	16%
Tower Hamlets	11%	12%	15%	15%	13%	15%	15%	14%
Wandsworth	12%	17%	17%	20%	16%	19%	20%	18%
Westminster	13%	17%	16%	18%	13%	16%	15%	18%
Inner London avge	12%	15%	15%	18%	14%	16%	16%	17%

Source: ONS (quarterly averages)

- 7.13 In outer London boroughs, the figures for on- and off-flows as a percentage of the claimant stock are more varied (see Table 7.4), and overall they are higher than for inner London. In Enfield and Waltham Forest, on- and off-flows as a proportion of the claimant stock are relatively low, suggesting that employment churn within the local economy itself may not be that great.

Area	Off-flows as % of stock				On-flows as % of stock			
	Mar 02	Jun 02	Sep 02	Dec 02	Mar 02	Jun 02	Sep 02	Dec 02
Barking & Dagenham	12%	19%	21%	23%	19%	21%	20%	21%
Barnet	12%	18%	15%	18%	17%	19%	18%	19%
Bexley	13%	23%	21%	24%	23%	22%	24%	23%
Brent	11%	16%	14%	15%	11%	16%	16%	16%
Bromley	16%	21%	21%	25%	20%	22%	23%	24%
Croydon	12%	18%	18%	20%	14%	18%	18%	18%
Ealing	17%	19%	19%	24%	20%	21%	20%	21%
Enfield	13%	19%	16%	17%	15%	17%	18%	19%
Greenwich	12%	16%	21%	22%	16%	18%	20%	19%
Harrow	14%	17%	18%	23%	18%	21%	22%	20%
Havering	13%	23%	25%	28%	22%	23%	26%	27%
Hillingdon	18%	21%	23%	28%	24%	23%	26%	27%
Hounslow	18%	27%	23%	28%	23%	26%	26%	27%
Kingston-upon-Thames	12%	20%	22%	20%	18%	24%	22%	23%
Merton	16%	18%	17%	20%	19%	20%	21%	20%
Redbridge	12%	20%	19%	23%	18%	22%	22%	21%
Richmond-upon-Thames	16%	23%	21%	26%	22%	23%	24%	25%
Sutton	11%	21%	22%	20%	20%	19%	23%	19%
Waltham Forest	12%	18%	17%	19%	17%	18%	18%	18%
Outer London avge	13%	19%	19%	21%	17%	20%	20%	20%

Source: ONS (quarterly averages)

- 7.14 The boroughs where on- and off-flows as a percentage of the claimant stock are high are the more prosperous boroughs where unemployment tends to be lower. For example, in Table 7.5, Havering, Hillingdon, Hounslow, Richmond-upon-Thames and Bromley (the most outer boroughs of London) have high on- and off-flows. This is probably because, overall, the residents of these boroughs possess higher levels of employment-related characteristics. This is not simply levels of qualifications, but also experience and more importantly recent experience. Recent experience ensures that ‘soft’ skills are maintained, and these soft skills are required to find employment.
- 7.15 The second type of employment churn mentioned was that, although jobs may be created in the boroughs, they may be filled with people from neighbouring boroughs. Therefore, the boroughs may need to create a lot more jobs than there are people unemployed. This may be particularly so if those unemployed cannot fill the vacancies, e.g. due to lack of qualifications, experience or because they are unsuitable, whereas those from neighbouring boroughs possess higher levels of employment-related characteristics and can fill vacancies.
- 7.16 Haringey’s neighbouring boroughs (as well as Enfield and Waltham Forest) are Barnet, Camden, Hackney and Islington. Although Barnet, Hackney and Islington have a greater degree of people signing off from claiming (see Tables 7.4 and 7.5), the extent of this is limited. Haringey’s neighbouring boroughs do not, therefore, have a great deal of

employment churn themselves, which may suggest that there is a limited effect of vacancies being filled by people outside of the borough.

- 7.17 Enfield is bordered by (as well as Haringey, Waltham Forest and Barnet) four local authorities from outside London: Broxbourne; Epping Forest; Hertsmere; and Welwyn and Hatfield. These four areas display a much greater degree of employment churn. Table 6.6 shows the on- and off-flows as a percentage of the claimant stock.

Table 7.6: On- and off-flows as % of claimant stock

Area	Off-flows as % of stock				On-flows as % of stock			
	Mar 02	Jun 02	Sep 02	Dec 02	Mar 02	Jun 02	Sep 02	Dec 02
Broxbourne	22%	24%	26%	26%	25%	22%	27%	27%
Epping Forest	24%	27%	24%	24%	27%	26%	27%	24%
Hertsmere	25%	25%	26%	29%	28%	27%	28%	26%
Welwyn								
Hatfield	26%	29%	26%	31%	31%	31%	29%	27%

Source: ONS (quarterly averages)

- 7.18 Waltham Forest's neighbouring areas (as well as Enfield, Haringey and Hackney) are Epping Forest, Newham and Redbridge. Both Epping Forest and Redbridge have fairly high on- and off-flows as a percentage of the claimant stock.

8 Mapping of strategic development sites

Introduction

- 8.1 The Upper Lee Valley report by Arup describes the 12 development sites in the area. A subsequent discussion amongst Matrix group members has led to 4 of these 12 being identified as the principal sites, and the ones which will receive most of the funding. This section considers the sites and the type of job opportunities they are likely to generate.

Overview of employment opportunities

- 8.2 The strategic sites suggest that development is to occur mainly in manufacturing, logistics, retail and office units. Two sites are also to promote clusters in sports and leisure and media. In Enfield, research and development is also proposed.
- 8.3 The promotion of more hi-tech industries and research and development is primarily to be in the Northern Gateway area at the far north of the Upper Lee Valley, and in Waltham Forest (manufacture of precision instruments).
- 8.4 Manufacturing development is hoped to occur through promotion of higher value sub-sectors in existing industrial estates. These estates are located down the reservoirs, the A1055 and the railway line from the M25 in the north to Tottenham in the south. The textile trade in Haringey is identified as a niche sub-sector.
- 8.5 Development should maximise the benefits of improved transport links via the Channel Tunnel Rail Link and Stansted Airport, particularly through the logistics industry. The Northern Gateway in Enfield and the Argall Estate in Waltham Forest should make particular use of this.
- 8.6 A number of clusters are proposed in the Arup assessment:
- around the Picketts Lock High Performance Athletics Centre
 - in the media and creative industry around the Wood Green area of Haringey.

- 8.7 Retail sites are cited for the particularly deprived south eastern corner of Enfield due to its location around the north circular, and for Walthamstow town centre.
- 8.8 Office units are to be developed in Walthamstow Town Centre, Haringey Heartlands and Tottenham High Road sites, and also in industrial estates in Blackhorse Road.

Local access to opportunities

- 8.9 It is encouraging that in several cases the likely developments on the key sites will generate the types of jobs which the profile of local residents set out above suggests are needed. In very simple terms the relatively low skilled logistics, manufacturing, retail and hospitality opportunities which are anticipated would sit well with the low skills base.
- 8.10 Some upskilling is also likely to be required in the area. Many of the strategic sites and proposed developments are in areas where there are low skill levels. This may put off inward investors, even if the environment issues are resolved.
- 8.11 Several of the sites are close to areas of disadvantage. However, access is frequently cited as a problem in the Upper Lee Valley area. Although, the M25, the north circular and railway lines from Liverpool Street and Kings Cross present good links, the major issue seems to be the difficulty for people to travel east to west across the area. The location of the reservoirs is a further barrier. Consequently, many residents are said to be isolated (e.g. in Northumberland Park) and businesses suffer (e.g. in the Blackhorse Lane Business Centre) because they then struggle to recruit/retain people.

Table: 8.1: The 4 primary development sites in Upper Lee Valley

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
Northern Gateway	<p>Site runs from extreme north eastern corner of Enfield along the A1055 road and local railway. Northern boundary is the M25, and southern boundary is the A110 (joins Waltham Forest and Enfield).</p> <p>Includes the wards: Enfield Lock, Enfield Wash, Green Street and Ponders End in Enfield; Chingford Green in Waltham Forest.</p>	<p>Two largest sites are the 100 acre Innova Park next to the M25 (centred in Enfield Lock) and the Brimsdown Industrial Estate (Enfield Wash, Green Street and Ponders End).</p> <p>25% of the Innova Park site reserved for R&D activities (requiring skilled labour), with the remaining 75 acres available for logistics activities, which are largely low skilled. The lack of management, IT, numeracy and literacy skills seen as a problem in this sector</p> <p>Brimsdown Estate is the location for some of the largest manufacturing companies in the area including automotive and food and drink sectors. These require a mix of skilled and unskilled workers.</p> <p>Need package of measures to overcome access constraints to the M25.</p>	<p>Includes one of the wards of the more prosperous northern half of Waltham Forest, and is close to the rest of northern Waltham Forest.</p> <p>Ponders End, at the southern part of the area, is an NRF ward in Enfield, and the other wards qualify for Objective 2 Funding. There is a degraded environment.</p> <p>On a wider scale, the site is close to the M25, the north circular and the rail network, although the site is often described as having poor access.</p> <p>The site, being in the north of the Upper Lee Valley boroughs, is close to South Cambridgeshire, Hertfordshire and is symbolically at the southern end of a “Cambridge corridor”.</p>
Tottenham International	<p>The area is centred on Tottenham Hale in the High Cross and South Tottenham wards. The area is in the south eastern corner of Haringey, bordering onto the western side of Waltham Forest. Land ownership is fragmented with Haringey Council being the major land owner in the area.</p> <p>Site is sandwiched between the Tottenham High Road and Northumberland Park strategic sites in the north, and the Seven Sisters NDC site in the south.</p>	<p>The recently developed Technopark estate has been successful in attracting SME tenants.</p> <p>Current proposals:</p> <ul style="list-style-type: none"> -Reconfigure the road network around Tottenham Hale which would improve access and free up space for development -Middlesex University has submitted a planning application for their proposed development of a new campus on the former GLS site -Possibility of extending the Technopark 	<p>Area suffers from significant economic, physical and environmental problems. However, it has substantial development potential because of its location and public transport accessibility, notably, its symbolic “interchange” positioning as the sole intermediate stop on the fast rail service to Stansted Airport</p> <p>High Cross and South Tottenham are economically deprived areas.</p>

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
		<p>to the south of the current site down towards Tottenham Hale</p> <p>-North of Tottenham Hale – opportunities to decant existing residents of the Lockwood and Mill Meads Industrial estates and redevelop them into incubator/spin-off units attached to the University, further extension of Technopark or office space</p> <p>-Hale Wharf site – owned by British Waterways – there are proposals to develop as residential or student housing</p> <p>-Paddock site – currently open space, there are proposals to redevelop as a hotel/conference/training centre</p> <p>-Tottenham Hale station – proposal to develop on top of the station – commercial/hotel/residential</p> <p>-Opportunities to intensify existing retail space</p>	
Blackhorse Road	Upland Industrial estate and Blackhorse Lane Business Centre, located in Lloyds Park ward on the Western side of Waltham Forest, bordering onto the eastern side of Haringey.	<p>Blackhorse Lane Business Centre is based at southerly end of site close to the Underground Station. Possibility of developing the Business Centre into flexible commercial/office space allowing expansion of the office type services.</p> <p>Uplands Industrial estate includes mix of industrial and commercial units of varying ages and ownerships. Industrial area as a whole has low quality infrastructure, poor and fragmented industrial sites within which premises are obsolete. Need for development of sites to meet the demands of modern</p>	<p>The Lloyds Park ward and the surrounding wards in Waltham Forest (Higham Hill, Hoe Street and High Street) and Haringey (Coleraine and High Cross) are economically deprived. High unemployment and low skills levels are common characteristics.</p> <p>The site has suffered from poor access. Traffic congestion and poor services on some of the industrial estates have prevented companies from operating effectively and led to major job losses for the area.</p>

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
		<p>businesses (identified specific developments at various sites so far).</p> <p>In Northern End and easterly segment of site reorganise and consolidate existing ownerships to enable delivery of SME/Commercial uses.</p>	
Central Leaside	<p>Key sites are Montague Estate, sites at Brettenham and Kenninghall Roads, the Eley and Angel Works and sites at Glover Drive and the Harbet Road Estate. The site area is intersected by the North Circular. Includes two NRF wards in the south-eastern corner of Enfield (Craig Park and Angel Road).</p>	<p>Intersection of North Circular has resulted in development of a strong large scale retail (largely unskilled) presence (current plans include possibility of brownfield industrial land being developed into an IKEA store). Retail pressure on current industrial usages is likely to continue with a strategic decision required on the future sectoral direction of the area. There is a possibility of relocating green industries in the area from elsewhere in the Upper Lee Valley.</p>	<p>Immediate area is arguably the most economically deprived in Enfield. The two wards have the highest unemployment, the greatest proportions of households with children and lone parents, and the lowest ranks on the IMD. Angel Road has the greatest proportion of non-whites, and Craig Park the greatest proportion of refugees in the Enfield NRF Area.</p>

Table: 8.2: The 2nd tier of development sites in Upper Lee Valley

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
Picketts Lock	The Picketts Lock site is centred on south-eastern Enfield and includes one NRF ward, St Peter's, and St Alphege (also qualifies for Objective 2 Funding).	The Picketts Lock site includes a range of smaller brownfield sites and industrial estates (Redburn estate and Meridian Business Park). It is also the site of the proposed High Performance Athletics Centre . There are significant opportunities to work with partners on the site (particularly the Lee Valley Regional Park) to use the High Performance Centre as an anchor for the attraction of other related industries and activities (create clusters) .	Deprived area of Enfield. Local residents have high unemployment and low skills.
Argall Estate	The Argall Estate is centred on the wards of St James Street and Lee Bridge in the south of Waltham Forest (also includes part of Leyton).	The Argall Avenue Industrial Estate and the Leyton Relief Road Corridor are the key focus for manufacturing (mixture of skilled and skilled manual, and some unskilled) and SME initiatives in the southern part of Waltham Forest. Most of the local infrastructure is older. Anticipated that the Temple Mills Marshalling Yard which is at the southerly end of the site will become a railway marshalling area and maintenance depot for the Channel Tunnel Rail link services (from 2007). Major opportunity exists to create a logistics (largely unskilled labour) hub around CTRL, the rail link to Stansted and the M11. Other opportunities include the demand for SME flexible units and the reorganisation of local Green industries .	Immediate area is in the more deprived south of Waltham Forest. Leyton is a priority ward and St James Street is in the most 15% deprived wards by the IMD. All 3 wards have high unemployment. Area borders onto Hackney. Area has benefited from improved access to the M11 under the last Objective 2 programme, giving it access to the M11 corridor and Cambridge. Access is to further improve from Channel Tunnel Rail Link services and Stansted rail link. Current regeneration activity includes the SRB Round 5 Lee Bridge Gateway to Opportunity programme.
Walthamstow Town Centre	Walthamstow Town Centre is located in the Wood Street ward of Waltham Forest. This ward is on eastern side of the borough – just in the more deprived southern half. East of the ward is the borough of Redbridge.	New Opportunities Fund for Walthamstow SRB project has a budget of £13.9 million and includes: empowering community; access to employment through e.g. Job Bank; revitalisation transforming	Town centre area with good access links via bus station, rail station and Underground station. In southern half of Waltham Forest, which is less prosperous than the north. Also borders

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
		<p>prospects of Walthamstow Town Centre and Blackhorse Lane.</p> <p>Proposals exist to redevelop Arcade, improve bus station, remodel town square and gardens and extend cinema. Other proposed projects include Central Arts Project to occupy Central Library Building and improvements to Central Rail Station. Opportunity to promote and develop student centre, café society and 24 hour destination.</p> <p>Opportunity to redevelop station as office/residential space on a key transport interchange.</p> <p>Possible consolidation of the existing retail uses (focusing on quality) that run along backbone of site freeing up space for office development.</p>	<p>onto Hoe Street ward, which has large-scale unemployment problem.</p>
Northumberland Park	<p>Centred on Coleraine ward and including part of Park ward, with some overlap with Bruce Grove and High Cross. The area is in the north-eastern corner of Haringey. Has been identified as one of the priority areas in Haringey's Neighbourhood Renewal Strategy.</p>	<p>Joining-up Northumberland Park SRB6 plans a neighbourhood focused programme of service improvements. Opportunity exists to deliver a better quality living environment.</p>	<p>Despite the area being in 3 wider regeneration programmes, over 40% of respondents to a recent MORI survey think the area has got worse.</p> <p>The wards are in the 10% most deprived wards in the country. The Northumberland Park Area has 19% ILO Unemployment, and only 25% of those not working actually want to work. The area is extremely diverse ethnically. 60% are non-white with large Black Caribbean and Black African communities.</p> <p>Some parts of the area are isolated with poor access.</p>
Tottenham High Road	<p>Tottenham High Road goes north from Tottenham wards along the border between Bruce Grove and Park wards and High Cross and Coleraine wards. Tottenham Hotspur football ground is on the High Road.</p> <p>The area borders other strategic sites,</p>	<p>The area's historic role as a retail centre has declined somewhat in recent years. Redevelopment along the High Road has created a range of small businesses and office units including: Tottenham Green Co-operative Workshops with units typically 500 sq ft; Morrison Yard (a</p>	<p>High Road cuts through economically deprived eastern side of Haringey. The wards are in the 10% most deprived wards in the country.</p> <p>The area borders other strategic sites, Northumberland Park, Tottenham International and the Commercial</p>

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
	Northumberland Park, Tottenham International and the Commercial Opportunities Zone.	converted brewery); London Enterprise centre – predominantly for businesses requiring office accommodation; N17 studios (formerly the Wingate Trading Estate, now owned by workspace); Bernie Grant Centre – Leisure Focus (Cinema/Theatre) . Opportunity to create an urban SME quarter for the Upper Lee Valley – building on recent redevelopment. Need to link to planned development at Tottenham Hale – area can be integrated. Possibility of more office space on the High Road.	Opportunities Zone.
Seven Sisters NDC	Seven Sisters NDC Area is centred on the Seven Sisters ward, and also includes the South Tottenham ward in the south east of Haringey. To its north is the Tottenham Central ward and the Tottenham International strategic site, and its south is Hackney.	Current industrial activity: lots of small scale wholesale and motor repairs activities (opportunity to upgrade?), strong local demand for small flexible units; Florentia Clothing Village – historically a centre for the Rag Trade, initiatives now under way to move up the value chain . Therefore, need to promote a shift within existing manufacturing sectors into higher value activities such as clothing design . Need to explore links to London Fashion Colleges, London Fashion Week and links to creative industries .	The NDC has more than £50m of funding, and covers around 11,500 residents. The two wards included, Seven Sisters and South Tottenham are in the 10% most deprived wards by the IMD. Seven Sisters NDC is ethnically diverse, with only 26% White British and 54% non-white (including 18% Black Caribbean and 18% Black African). The NDC Area does not have particularly high unemployment (ILO unemployment is 9%) compared to Haringey overall (11%), but does have a high inactive population (43% compared to 35% in Haringey overall). Only 13% of those not working are actually looking for work.
Commercial Opportunities Zone	Commercial Opportunities Zone is between White Hart Lane and Northumberland Park in the north east of the borough.	Area is predominantly mixed use with small scale industrial units and residential units . Opportunities exist to build upon some of the existing larger scale industrial activity (Willoughby Estate). Need to explore/focus on SME opportunities .	Area is in economically deprived wards: White Hart Lane, Park and Coleraine. Unemployment is high in the area. Access is poor.

Strategic Site	Location and surrounding area	Details and priority opportunities	Characteristics of area
Haringey Heartlands	Located near to Wood Green Town Centre to the west of the Upper Lee Valley strategic area, and in the Noel Park ward of Haringey. It's a 15 hectare site adjacent to the mainline rail line north from Kings Cross.	Currently the site is subject to a major application for its redevelopment for a range of uses including; over 1,000 residential units, hotel, retail, healthplex, library, 250 live/work units and 11,000m² of B1 floorspace. Proposed expansion of the existing resident Chocolate Factory development providing the anchor tenant to a Cultural Quarter for Upper Lee Valley. Expansion completed by the consolidation of the Mount View Theatre School on the site. Opportunities exist on the remainder of the site to develop SME units and some office space.	The Heartlands consists of wards that are less economically deprived than those in the east – although Noel Park is still in the 10% most deprived wards (IMD). No direct access to the site from the town centre, although the area itself has good access. Area in general is on the up with new cinemas, pubs, restaurants opening/recently opened, and a thriving shopping centre.

9 Conclusions and next steps

- 9.1 The Upper Lee Valley is an area where the historic decline in manufacturing jobs has been numerically offset by growth in service sector jobs. This reflects the changes within the broader labour market in London which saw manufacturing jobs decline by 45% between 1983 and 2000 whilst service sector jobs grew rapidly. The ULV Boroughs have also experienced periods of high, registered unemployment – but these totals have declined sharply in the last 6 years – falling from over 44,000 JSA claimants in 1996 to less than 20,000 by 2002. Of the remaining total, around 10,000 are longer-term unemployed (more than 6 months).
- 9.2 The significant reduction in JSA unemployment reflects the degree of success for locally devised programmes and the impact of major interventions such as the New Deal which, across the 3 Boroughs, has helped nearly 5,000 longer term JSA claimants into sustained employment. Strong employment growth since the mid-1990s combined with high levels of placement activity by the Boroughs’ Jobcentres have combined to move significant numbers of comparatively job-ready claimants into work.
- 9.3 Although “unemployment” is less of a problem today, the ULV Boroughs do not enjoy a healthy labour market conditions. Many in the resident population remain stuck in non-employment and in precarious work which reflects:
- **a low skilled population base** – so that even people who are in-work may be vulnerable to job losses caused by any cyclical down-turn or further structural change
 - **pockets of severe disadvantage** - within each boroughs there are significant concentrations of disadvantage in particular wards: 4 in the east of Enfield; 9 in Haringey, concentrated in the central and eastern parts of the Borough; and 4 in the southern and central parts of Waltham Forest
 - **high and increasing levels of economic inactivity** – representing up to 28% of the working age population across the 3 Boroughs. Of this economically inactive population, 20% in Haringey and nearly 30% in Enfield and Waltham Forest would like to work – although in the more disadvantaged Wards, these proportions are lower. Nonetheless, at almost 33,000 this population group is larger than the 26,000 defined in the Labour Force Survey as “unemployed”. The size of this group has increased significantly over the past 6 years, while unemployment has been falling.

- **population movement into and out of Haringey is slightly more rapid than in other parts of London.** Where this involves employed people leaving the area being replaced by non-employed migrants, this may be a significant contributing factor to low school attainment and non-employment.
- **ethnic diversity has increased** mainly as a result of the arrival of refugee populations but also from different types of inward migration. Black and ethnic minority populations, (as well as disabled people and lone parents) have particularly low employment rates across the 3 Boroughs.

9.4 For more than a decade, the three Boroughs have led a range of initiatives and programmes of support for the non-employed populations. Since 1990, substantial funding has been secured from Objective 2 and 3 of the ESF and from the Government’s Single Regeneration Budget. Since 1998, the New Deals for young people and for adults, for Lone Parents and Disabled people have substantially reduced the JSA claimant count whilst the Employment Zone in Haringey has specifically been targeted longer term adult unemployed.

9.5 However, these programmes have either targeted the shorter-term unemployed who are more job-ready, or have had only limited success in moving substantial numbers of people into work. Most of these programmes designed to assist the harder-to-serve population groups have identified a wide range of “intrinsic” barriers to employment, the relevance of which, this study confirms. These are principally:

- lack of Basic Skills, particularly English language competence for refugees
- poor generic employability skills and the absence of recognised qualifications and work-specific skills
- family care responsibilities
- a range of barriers relating to motivation, behaviour, criminality or substance abuse problems
- the cost of transport and reluctance to travel
- poor understanding of the labour market and of services available from intermediaries.

9.6 The 3 Boroughs – and their disadvantaged Wards in particular – are also characterised by a number of problems that mean entrants to the labour market make a poor start to their adult life:

- young teenagers are not well engaged in activities that build social capital, cohesion and encourage them to engage with structured learning through recreational activity like sports, music and arts
- a significant proportion of young people become disaffected from schools (particularly from some ethnic minority backgrounds), have lower than average attainment levels at all Key Stages and exhibit levels of truancy between ages 11 and 16.

9.7 Additionally, many potential jobseekers have poor work motivation caused by a number of features in the labour market which create “extrinsic” barriers to employment:

- placement agencies often make unsuitable job placement matches which, combined with poor working conditions and insecure job tenure, result in many job entrants returning to unemployment and becoming caught in a cycle of work/non-work
- wages are often too low – particularly in locally based jobs – to compensate for the high costs of housing and family support that are otherwise paid-for in benefits
- many available jobs are unattractive particularly to young people who have aspirations that do not match their abilities whilst training routes into work often do not provide access to more interesting and better paid work.

9.8 Most employability programmes in the 3 Boroughs offer services that meet many of the “intrinsic” needs. However, relatively few are configured to address multiple occurrences of these barriers or offer integrated services that progress a client from one agency to another steered by an agreed Action Plan. In Haringey, the Employment Network concept has been developed to encourage progression between agencies, but this approach is not coordinated with Jobcentre Plus services and is underpinned by funding incentives that can perversely “trap” individuals in an unplanned sequence of services that do not necessarily move the client on a clear path towards work. There is also a limited clarity within the service organisations of employer requirements which is caused by poor employer engagement tactics or by employers lacking precision in understanding or communicating their HR needs.

9.9 There is very limited evaluation evidence showing the sustained job-entry outcomes for many of the ESF and SRB funded programmes, nonetheless, they have exhibited three principal weaknesses:

- the total number of beneficiaries remains comparatively small when measured against the total non-employed populations, so the scale impact is limited
- with the exemplary exception of the Stansted Runway programme, current interventions do not offer any significant post-placement support. Consequently, they are unable to keep participants close to the labour market if they lose their job and cannot help progress beneficiaries to higher level, better remunerated and more secure jobs
- the bias of current interventions, identified through the mapping exercise, is on close to labour market activity. However, the trend data shows that this is a declining problem, at a time when economic inactivity and disengagement is growing
- most delivery organisations offer a standalone service that addresses a single specific barrier to work. Some provide a very limited suite of integrated services but very few are configured to provide a structured transition into work consisting of a range of services that, at its broadest, would encompass:
 - motivation and personal support
 - basic skills
 - generic or work specific skills
 - work orientation, job trials or supported employment
 - vacancy matching and job placement services
 - in-work personal support and further skills development.

9.10 Mainstream agencies also exhibit a number of limitations to the services provided. Jobcentre Plus inherits a range of programmes initially designed to a standard formula that aimed principally to help shorter-term unemployed people. The inflexibility of these programme is slowly being addressed

- 9.11 A programme is required which introduces new forms of intervention or re-configures current services in ways described below.

Engaging the disaffected and excluded

- 9.12 Recognising and addressing the wide range of “intrinsic” and “extrinsic” barriers to work faced by the most disadvantaged, to draw in to the labour market those who are currently not in work or looking for work. The focus should be on out-reach to engage people in to existing support structures, with a particular emphasis on the circumstances faced by ethnic minorities.

Pathways in to employment

- 9.13 To provide the full range of services which people require to move from inactivity to employment. This would recognise that mainstream and other agencies have a key role to play, and the importance of job-seekers being assisted to navigate their way between the agencies involved. In addition to job brokerage and customised training, flexible and integrated *transitional work* services will be required to bring potential job-seekers closer to the labour market, equip them with entry-level skills and to support them once employed.

Linking people with new opportunities

- 9.14 The physical investment planned on key sites will stimulate a significant number of new job opportunities. The most relevant opportunities for those in the NR areas will be identified, relationships with employers developed and customised support programmes designed that are driven by the requirements of both employers *and* the needs of job-seekers.

Employee progression

- 9.15 Many entry-level jobs in the 3 Boroughs are low paid and precarious with a high proportion of people entering these jobs quickly returning to unemployment. An important goal for the Single Programme will be to ensure that job entrants are able to retain jobs over the longer term by progressing into better paid and more securely tenured posts. Local residents should be encouraged to develop their skills, and employers their workforces. Where these can be brought together they link with a wider business development agenda. Where employers are reluctant to engage, their employees should be encouraged to develop their skills. Even if this

leads to some staff turnover, it also creates a higher skills base and entry level opportunities for those not currently employed.

Supporting the learning sector

- 9.16 Efforts are required to improve competence at VQ levels 2 and 3, increase learning participation rates and improve attainment across the 14-19 age range. Better school and FE college performance will help to achieve more population stability and ensure that more young people acquire benefit from higher skill levels and make a secure transition into the labour market. In particular, the programme will seek benefits from the presence of Middlesex University, support higher participation in Modern Apprenticeships, promote industry and manufacture as a career choice and enhance the work of Education Business Partnerships.

Progress and next steps

- 9.17 To date, the main emphasis of partners' interventions has focussed on the supply side of the labour market – to understand and deal with the intractability of non-employment in the area. The next steps for the Single Programme must be to more fully understand the demand-side of the labour market and the scale and nature of entry-level opportunities that will occur in:
- the main development locations in the narrowly-defined Lee Valley area;
 - across the three boroughs (especially where they can be easily reached from Neighbourhood Renewal wards);
 - wider opportunities both in central London and to accessible locations to the North alongside the M25 and the Cambridge/Stansted corridor.
- 9.18 In addition to matching business requirements and residents' needs, the strategy for Upper Lee Valley will address the nature of current provision. The 3 Boroughs are served by a wide range of employability projects and services funded by Objective 2 and 3, SRB, NRF and the mainstream agencies, Jobcentre Plus and the Learning & Skills Council. As a result, much of the planning and delivery infrastructure is fragmented whilst the capability, quality standards and performance of delivery organisations are varied.

9.19 In the Upper Lee Valley, the organisation of public sector interventions is further complicated by having 2 Jobcentre Plus Districts, 3 Local Strategic Partnerships, a number of sub-regional agencies and sector specific bodies such as the NHS workforce confederations. These Partners need to agree that greater coordination is required and that further funding should support interventions that are well integrated with mainstream services to avoid duplication and help to ensure that these mainstream services are focussed on the needs of firms and individuals in the area. Effective integration requires mainstream public agencies to “pool” their planning and for delivery organisations to collaborate in offering a seamless range of services to jobseekers.