

MEANWHILE, IN LONDON: MAKING USE OF LONDON'S EMPTY SPACES

*Nicolas Bosetti
Tom Colthorpe*

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Nicolas Bosetti and Tom Colthorpe

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Summary

London's meanwhile use sector has blossomed in the last decade...

- Property guardianship now houses up to 7,000 people in London.
- Other meanwhile uses range from small community gardens to large workspaces.
- Our survey found 51 active meanwhile sites, with a combined floorspace of 188,600 sqm, over two and a half times the floorspace of Selfridges.

...and meanwhile use offers value to the city, and to developers and landowners.

- By offering the flexibility for spaces to evolve, new uses to emerge, and perceptions of places to change.
- By providing affordable space for London's next generation of entrepreneurs, artists and activists.
- By opening up the development process, allowing for experimentation, and offering opportunities for public engagement.

But there is untapped potential...

- At least 20,000 commercial units in London have been empty for at least six months, and 11,000 for over two years.
- As London redevelops itself – around one per cent of London's land will be developed in the next ten years¹ – windows of opportunity for meanwhile use will open before or during redevelopment.
- There is considerable “slack space” – underused space within or between buildings, particularly in outer London – although this is not currently measured.

...with three types of hurdles preventing more meanwhile use.

- Landowners often overestimate the risks and undervalue the benefits of giving over a site to meanwhile use.
- The planning and licensing systems can make meanwhile projects difficult to undertake.
- The lack of larger meanwhile use operators limits capacity to take over sites and manage meanwhile activity.

Our recommendations identify ways that landowners, public bodies and meanwhile use operators can unlock the value of meanwhile use in inclusive growth:

- The Mayor of London should lead the growth of meanwhile use through competitions, guidance, investment and use of Greater London Authority (GLA) Group land.
- London boroughs should publish their registers of empty commercial units, and seek to rationalise planning and licensing processes for meanwhile use.
- Government should provide stronger incentives through tax and regulatory systems for community use of “stuck space” and underused space.
- Business Improvement Districts and other agencies should seek to make the case locally for meanwhile use.

Introduction

Making use of stuck or forgotten spaces is part of London's history. In some cases, this is in order to address a need – 30,000 people lived in squatted accommodation at the peak of the squatter movement in the 1970s.² In others, the aim is to trial new attractions and uses – the Young Vic, Gabriel's Wharf, and the London Eye were all planned as temporary structures; they now define the Southbank, and the Eye has become the most popular paid tourist attraction in the UK.

London looks different today. The city no longer has a problem with long-term dereliction. Residential land values have increased sharply,³ adding pressure on other uses,⁴ and to many it feels as if every piece of land in the capital has a price tag on it.

The city was never cheap, but it always had its fringe – Southwark, Soho, Shoreditch – a seedbed for innovation that made London successful, resilient and fun. Where is London's fringe today? Private rents have been running ahead of earnings,⁵ and the cheaper locations for office space have seen the fastest increases in rent.⁶ For many, this means the first rung on the ladder of homeownership, entrepreneurship or activism has been removed.⁷ Not only does London lack space to take risks and set up shop on the cheap, it also means that non-market uses such as social housing, community and artistic spaces cannot afford space in the city without hefty subsidies.

Against this backdrop, London has seen a flurry of meanwhile projects in the last decade. Meanwhile use is a loose designation for activities that occupy empty space, while waiting for another activity on site. Meanwhile uses can be as diverse as permanent uses: London has pop-up shops, bars, allotments, art galleries, football pitches; as well as housing or workspace on a meanwhile basis. Meanwhile uses are usually defined by their short time frame, which makes them relatively affordable. Most landowners charge low or no rents for meanwhile spaces, because these spaces are second hand and time sensitive: they may need investment to be fitted out, but there is only a short time period to recoup that investment.

Thus, meanwhile use has become the only way to do a project relatively cheaply in much of London: there can be artists' studios in Mayfair, free concerts on Brick Lane, a new museum in Vauxhall, accommodation for the homeless in Ealing. Some see meanwhile use as a conscious choice, to shake perceptions of an area, raise interest, or to address a need.

The more cynical see meanwhile activity as a last resort: London's land values have become so high that project promoters can only realise their projects in meanwhile spaces, where they cannot take root. And because meanwhile uses introduce new uses and a new population to an area, they can be controversial. The more optimistic use meanwhile space as a way to offer opportunity to those unable to afford the city otherwise, to try out new activities, and to make things happen in parts of the city needing greater economic vitality.

But meanwhile use reveals other shortcomings in the way we make London, particularly in the types of new spaces that are built, and the process by which these are decided and designed. The rise of meanwhile activity shows that there is a need for more flexible space – for instance smaller retail units, one step up from a market stall, that can be subdivided or joined up. Or the need for spaces that straddle use classes, which can be in turn workspace, garden and nightclub within a day. The city's new “soft” infrastructure – the public realm, or the new community and creative spaces – is often agreed in masterplans and negotiations between local authorities and developers, yet these spaces require more than the specification of a number of square metres or planted trees to be successful.

The growth of meanwhile use also reveals some trends to which the real estate industry and the planning system have been slow to respond – such as growing interest in makeshift and recycled spaces and other changes in consumer behaviour – while digital makes it easier to broker or manage spaces as a collective. These changes are adding pressure in particular on outer London town centres, many of which lack some of the amenities that foster resilient clusters.

Yet we know little about how the benefits and potential costs of meanwhile use play out in practice, and whether meanwhile use could be scaled up to become a pillar of citymaking in London. This report explores what contribution meanwhile use can make to addressing the city's pressing inclusive growth challenge. Can meanwhile use become London's new fringe, and breathe life into more parts of the city?

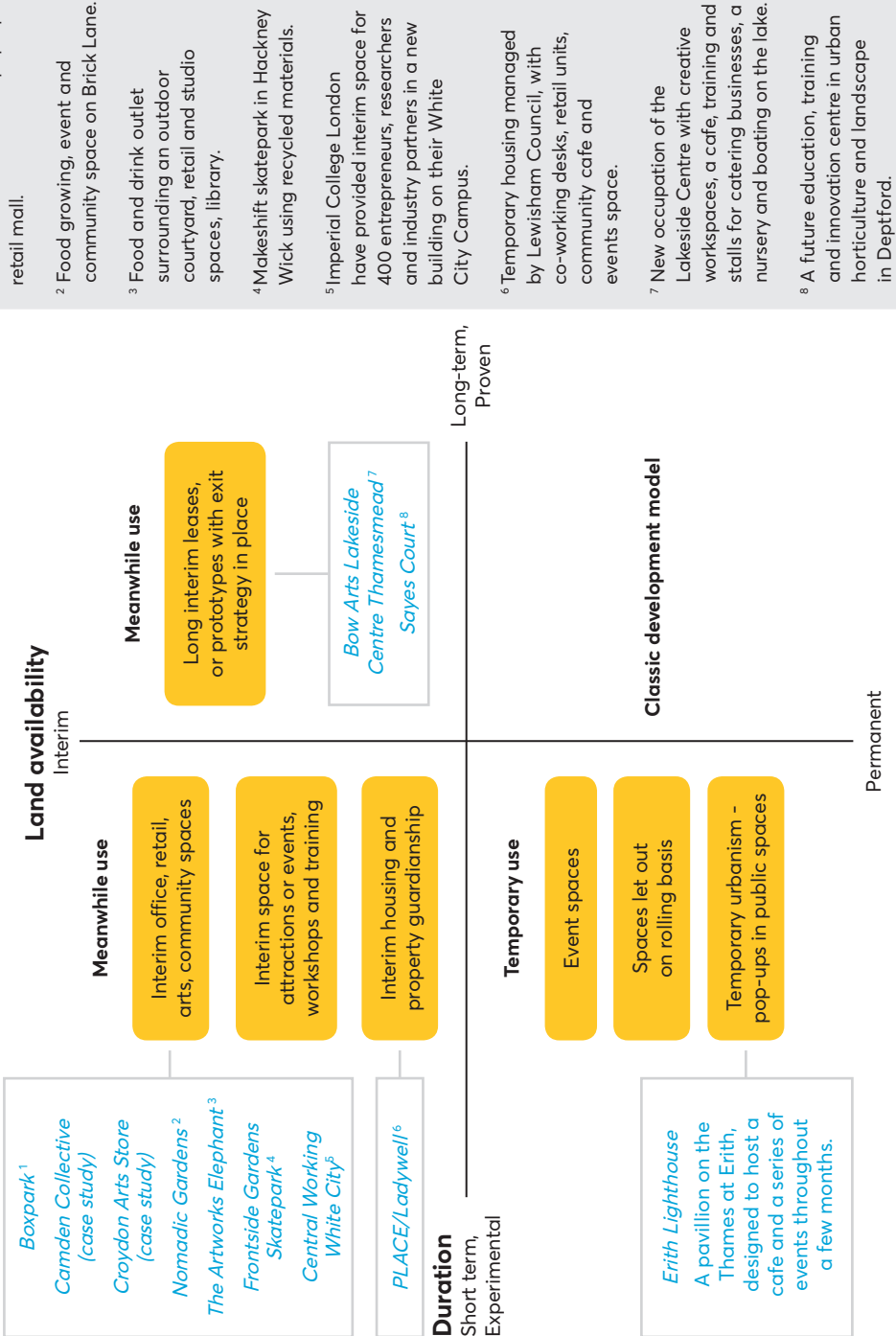
Chapter one investigates the value of meanwhile use to London. Chapter two shows that the potential for meanwhile use in London is still vastly untapped, and chapter three explains factors holding the sector back. Chapter four suggests ways the public sector and the development industry could scale up meanwhile use.

To do this, the report uses a mix of research methods. Through desk research and site visits, we estimate the size of the meanwhile sector in London. To assess their value to the city, we reviewed meanwhile projects' impact studies, and conducted a survey of 60 local businesses neighbouring three high-impact, high-visibility meanwhile uses. In order to map potential, we analysed the first pan-London dataset of empty commercial units. We interviewed 35 meanwhile providers, housebuilders and local authorities to understand why they chose to open up their land (or not), and the hurdles they face in doing so. The report also offers good practice case studies from other cities. The findings and the recommendations were then tested at a public event hosted by U+I which brought together policymakers and practitioners.

Figure 1: What do we mean by meanwhile use?

Not all temporary uses are meanwhile: meanwhile uses take advantage of a window of opportunity on a site, before and after another use. And not all meanwhile uses are short term. Some meanwhile uses are offered long leases, for instance in regeneration projects spanning decades.

Figure 1: What do we mean by meanwhile use?



1.

**A new fringe
for the city**

The types of value generated by meanwhile uses are as varied as the types of meanwhile projects themselves. But do meanwhile projects have value by virtue of being meanwhile? We argue that they do. In successful cities like London, there are three sources of meanwhile value: efficiency – the benefits of avoiding vacancy; affordability – the benefits of adding affordable space; and flexibility – the benefits of doing projects on an interim basis.

Efficiency

Part of the meanwhile appeal stems from its efficiency value: a big motivation for organisations doing meanwhile use is that putting space to use is a better option than leaving it vacant, particularly in a city where land is in short supply.

The opportunity value of most London meanwhile activities is positive, because leaving land empty is costly, not only in terms of security and property taxes,⁸ but also because it increases the risk of crime⁹ and lowers land values nearby.¹⁰ Indeed, US scholars speak of vacancy as an “epidemic”, because empty units have an effect on neighbouring properties: they suggest that a place is not looked after, and signal a spiral of decline.

Affordability

While meanwhile use provides interim solutions to avoid vacancies and use urban space efficiently, meanwhile activity isn’t necessarily short-termist. Meanwhile use also creates value by driving up the supply of affordable space. Affordable space gives licence to experiment in an expensive city, providing businesses with an opportunity to prove a concept, or fail at low risk. Meanwhile use also creates space for non-market uses, such as public realm, the arts, education, training and temporary housing, which cannot afford the city’s land values without subsidy. Many of London’s more unexpected and playful uses of space have been enabled on meanwhile space because it was provided at low or no rent, from pop-up lidos to warehouse parties.

Flexibility

There are also specific benefits to opening up spaces temporarily rather than permanently, and these effects often radiate beyond the benefits of affordable space. Temporary projects allow for flexibility: they offer a platform to raise interest, showcase work or an idea – much like art exhibitions – and meanwhile projects can do this for their promoters, but also for the city, by allowing flexibility for places to evolve, and opening up the development process.

Time-limited interventions can create stimuli that change perceptions of an area and strengthen local economies. Nearly all housbuilders and local authorities that set up meanwhile projects use public-facing meanwhile activities to bring new people to a place and rejuvenate a high street. The Head of Regeneration for a large London development company described this well:

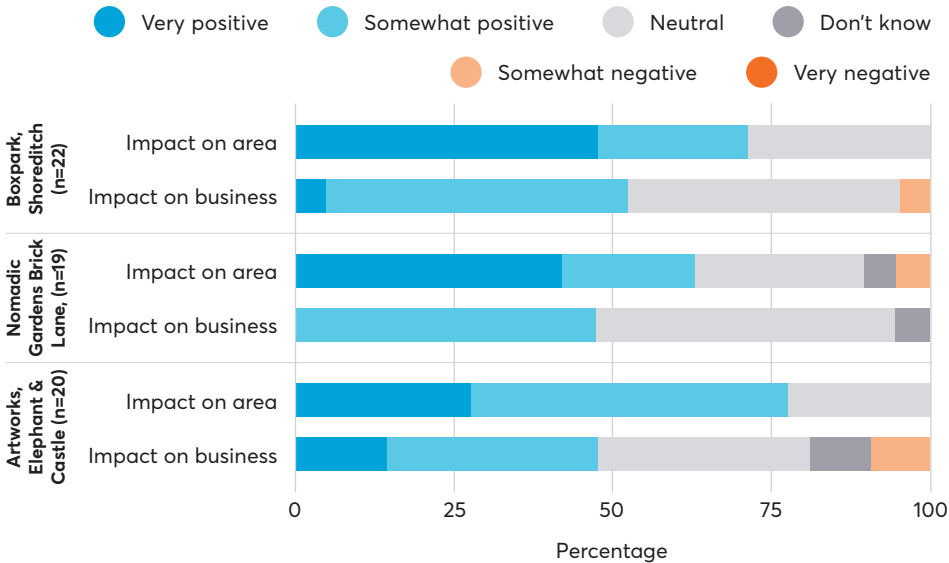
"We wanted local people to feel it was their park. We wanted community groups to be able to take the space so that it felt like a real place, and so that developers can see a site with a bit of life and identity."

Head of Regeneration, large London developer

We surveyed shopkeepers and owners near three high-profile meanwhile uses to investigate whether these benefits were felt in the city's streets. Local businesses saw the value of meanwhile projects in generating activity in the area – although only a few with a broad clientele (convenience stores) felt a direct benefit in terms of revenue. Interviewees also valued the social infrastructure or the character that these meanwhile spaces added, even if they did not visit them personally.

The temporary nature of meanwhile use also allows for experimentation, which can challenge current practice and improve development, for instance around use mix, density or funding.¹¹ Meanwhile use has enabled new mixed-use spaces to emerge, for instance projects joining up food stalls, bars, retail and events.

Figure 2: Survey of 60 shop owners and shopkeepers working near large London meanwhile projects



Survey questions: 'Overall, how would you rate the impact of [this scheme] on the area?' and 'Overall, how would you rate the impact of [this scheme] on your business?'

These meanwhile schemes can extend activity on the high street at lunchtime or into the evening, and create a critical mass of traders that draw people in.^{12, 13} These projects also prove that more flexible approaches to funding leisure spaces can work:

“Meanwhile use will show the investment world that you can get greater combined cash flow from mixed use than what they are doing at the moment.”
Director of Financial Strategy, London university

Meanwhile use also challenges conventional citymaking, because it does not operate within the usual life span of new buildings, and is less deterministic over who their users will be. Meanwhile activity allows developers to leave some flexibility for places to evolve, without pre-empting how lifestyles and demand will change – as mentioned by the Head of Planning at a

major housebuilder: *“We don’t want to set in stone the type of retail and services and their location.”*

But “meanwhile citymaking” goes beyond challenging the type of development, and can influence its process too. We found that housebuilders doing meanwhile use are interacting with local charities and resident groups to produce social impact, for instance animating public space, funding art exhibitions or mentoring small businesses. This can potentially shape the design of new development, as planning authorities may require provision of community spaces or public realm, but few housebuilders have experience of managing this themselves. Having occupants on site provides a prototype for the future space and can potentially influence its design, as mentioned by a meanwhile user:

“Developers and architects are not on site – by having us in [temporarily], they can visualise how people use the space. Otherwise you build a place without an idea of who will be living there.”

Founder, meanwhile use operator

Pop-ups also provoke interest, provide opportunities to get involved, and broaden the conversation around development. This was the experience of a London developer heavily involved in meanwhile use:

“Meanwhile use does not reduce local opposition, but it fosters better conversations, people get more involved. It’s a platform for communicating with people who may not interact with you.”

Head of Marketing, medium-size private developer

Meanwhile use brings another form of resilience, by softening the process of change. Short- and medium-term projects can help mitigate the negative impacts of regeneration projects on businesses, which often lose clientele as places change – though the evidence to date is only anecdotal:

"Having people living alongside large regeneration projects helps mitigate their effect for local businesses. Otherwise not only have you lost the community, but also the services that people need when they come back."

Director, property guardianship company

Costs and risks

There are also challenges and potential costs to operating projects on a meanwhile basis.

Efficiency

Even a meanwhile use ties up assets and resources (such as investment of time and energy in preparing a site). This could in theory make it harder to capture other opportunities, and could divert resources from other priorities. But we were not given examples of this being a problem in our research.

Meanwhile activity does need some time to break even, given interview and anecdotal evidence suggest that moving temporary structures can be costly, even if they were designed to be moveable.¹⁴

Affordability

If the provision of affordable space is expected to deliver social outcomes, how should the beneficiaries of meanwhile projects be selected and is there a risk of unfair competition with those not benefitting? This is of particular concern where there is public subsidy (such as free land) or corporate patronage for the public good.

Businesses in our survey were not concerned by competition, despite being located near larger, more visible meanwhile projects. The few negative voices were so because they perceived the projects as exclusionary of local businesses and unaffordable to operate from.

Flexibility

Not all uses are suited to transience. Whilst meanwhile use can create longer-term value out of temporary projects, flexibility works best for projects that do not

need to remain on one site to generate longer-term benefits. But evidence from our interviews and impact studies shows that some uses like retail or community projects need to forge a local link to generate social and economic benefits; that is, they need to be rooted in a place or in residents' habits to make the most of the meanwhile opportunity.^{15, 16, 17}

"As a public sector body we have become more interested in the longer-term end of meanwhile use, seven to 10 years – so you can have proper office space, community gardens, libraries. Those uses seem credible at that time length."

Head of Design, London planning authority

But several interviewees argued that the value of those meanwhile projects which are designed to be flexible can also be fragile, if there isn't a space to turn a successful prototype into a longer-term project:

"In terms of long-term use, we've learnt of great projects that lasted – but the skate park was given a month's notice, it seemed really abrupt. At the moment the meanwhile use shuts down you need to be really careful. Users and networks built up over years can be gone."

Head of Design, London planning authority

"Do our sites have a legacy? Not really in the places they used to operate in. But as a whole, the project does have impact, for instance with the permanent spaces we get offered through our meanwhile use work. And our main legacy is the business and the alumni network."

A provider of meanwhile workspace

Impact studies and our interviews show that achieving both social and economic value from

meanwhile use takes time, follow-up, and dedicated personnel. Affordable space may be an enabler of social and economic value, but support staff and a move-on strategy are needed to maximise that opportunity. Case studies 1 and 2 offer examples of meanwhile uses with long-term plans.

Measuring benefits and costs

Figure 3 summarises the evidence. Assessing claims of value is a difficult exercise, partly because we lack robust impact measurement to date, and partly because many meanwhile projects are acupunctural, and much of their value, intangible. To measure their effect on economic or social outcomes would require extensive interviewing and the development of a counterfactual (“do nothing”) scenario, which are costly for meanwhile operators to produce. However, we used three sources of evidence to fill this evidence gap as much as possible:

- A review of available impact studies: Boxpark Croydon,¹⁸ Granby Space,¹⁹ Platform Project at Loughborough Junction,²⁰ Pop Brixton,²¹ George Street Studios.²²
- A survey of 60 shop owners and shopkeepers working near three of London’s larger meanwhile projects - those more likely to have noticeable impact on neighbouring businesses.
- Our 35 research interviews, to understand how meanwhile use stakeholders perceive the value of their meanwhile projects.

Though they are small, meanwhile activities can allow London to be resilient in a period of dramatic change – by creating space for experimentation, leaving flexibility for places to evolve, and opening up – even slightly – the development process. The next chapter looks at the potential for scaling up meanwhile use.

Figure 3: Opportunities and challenges of meanwhile uses

Meanwhile value	Benefits/opportunities	Costs/challenges	Evidence
Efficiency	<ul style="list-style-type: none">• Cost mitigation• Better use of assets• Generates activity	<ul style="list-style-type: none">• Short term fix could compromise a long-term opportunity• Costs of moving to a new space• Nuisance if space is poorly managed	<ul style="list-style-type: none">• 4 out of 4 studies show very positive impact• Interview evidence very positive
Affordability	<ul style="list-style-type: none">• Space for non-market uses• Low cost risk taking	<ul style="list-style-type: none">• If there is subsidy, who benefits from meanwhile space?• Risk of unfair competition with businesses that aren't subsidised	<ul style="list-style-type: none">• 4 of 4 studies show some positive impact• Interview evidence positive, though difficult to ensure benefits accrue to local residents• Business survey shows little concern about unfair competition
Flexibility	<ul style="list-style-type: none">• Shake perceptions, introduce people to an area• Challenge development practice (use class and mix, density, who should interact)• Space for the unexpected• Softens the regeneration process• Opportunity to get involved	<ul style="list-style-type: none">• Legacy: would the project have a better value proposition if it were long-term?	<ul style="list-style-type: none">• Studies and interview evidence is mixed, depending on use. There are higher costs of flexibility for community-based projects; modular temporary accommodation and retail• Neighbouring businesses are positive overall. They value the additional footfall and the social infrastructure the most.

Case study 1: Croydon Arts Store, Croydon

The London Borough of Croydon is championing meanwhile use to generate activity in the town centre, and experiment with potential civic and cultural spaces as a prototype for community space in a new development. The council has turned a four-storey empty shop in a shopping centre earmarked for demolition, into one of the largest arts spaces in the borough. Croydon provided the funding and the initiative, but the project is operated in partnership with the Kingston School of Art, TURF and ArtHalo; two established collectives of Croydon artists, who run the exhibition space, arts skills courses, and creative expression workshops. In its first year, Croydon Arts Store has offered exhibition space for Kingston art students, creative photography workshops, and art residencies.²³

The partners want Croydon Arts Store to explore the role of art and culture in a shopping centre, engage Croydon residents in art making, and create a working prototype for the community space that Westfield will provide in the new development. The Store will also offer a few workplaces to take council planners outside of the town hall.²⁴

Case study 2: FIELD, Preston Barracks, Brighton

London-based developer U+I has played an active role in curating meanwhile uses on their land before construction starts, as well as supporting occupiers in finding a move-on location at the end of their tenure. Alongside the local enterprise partnership, U+I funded the renovation of a disused army barracks on their site into a co-working space for local startups. U+I selected eight entrepreneurs through a competitive application process and provided them with space to experiment and grow in exchange for their start-up spirit, a minimal service charge and a commitment to assist in community events and projects.²⁵ When the meanwhile use came to an end in Spring 2018, six of the occupants created a joint limited company to relocate their offices nearby – a move that U+I helped to fund, in order to preserve the small business community that had formed under their guidance.²⁶



Croydon Arts Store. Credit: Ruth Ward



FIELD, Brighton. Credit: Jim Stephenson, U+I

2.

**Popping up
everywhere**

This section is the first attempt to estimate the amount of meanwhile space in London. London's meanwhile use sector has boomed in the last decade, partly thanks to the property guardianship industry, which became active in London about a decade ago and now houses up to 7,000 people in London, according to research by the University of York.²⁷

We surveyed all other types of meanwhile activity in London, and gathered a knowledge base of 51 active meanwhile sites, ranging from small community gardens to large workspaces. Combined, their estimated floorspace is 188,600 sqm, over two and a half times the floorspace of Selfridges and roughly the floorspace of Westfield London.²⁸ A full list of these sites, their use and their floorspace can be found in the supporting document on our website . Although our sample was as exhaustive as possible for this project, it records the more visible spaces. Not all meanwhile space is public facing or branded as meanwhile use: there is also a lot of meanwhile activity inside buildings that have been earmarked for redevelopment. For instance, including the Elephant and Castle shopping centre in the figures would add around 10 per cent to the total floorspace in our knowledge base.

We can safely say that most meanwhile uses in London are not quirky or public facing: they simply enable Londoners to live and work in parts of the city that they often wouldn't be able to afford otherwise. We estimate that between half and two-thirds of meanwhile space in London is occupied by live-in property guardians (representing between 175,000 sqm and 350,000 sqm depending on estimates).

This is not surprising, given housing is London's premier need and that the property tax regime favours property guardianship over other types of meanwhile use.

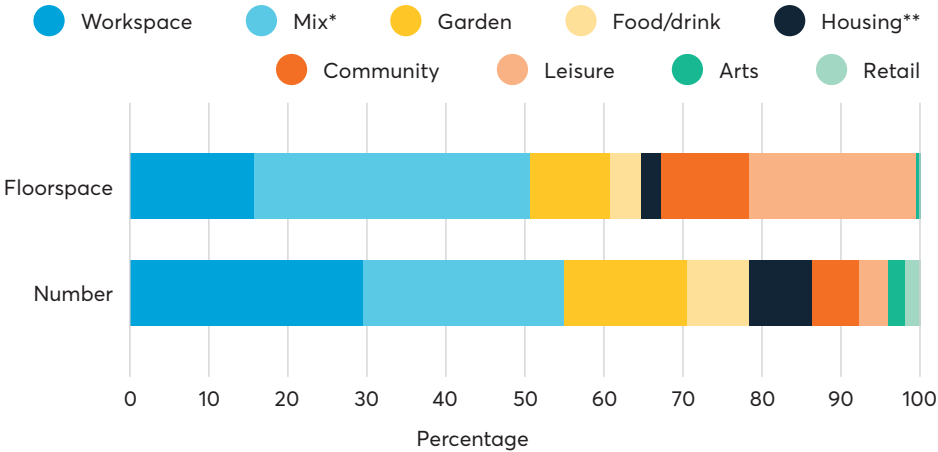
Offices are likely to be the second source of meanwhile use in London; they come third in our floorspace estimates but workspaces are less public facing thus easier to have been missed out in our sample.

A large proportion of the remaining meanwhile uses are mixed use – most of them combining retail

with food courts and bars. Only a small amount of meanwhile space in London is given over to one use exclusively, such as gardens, community uses, or arts and leisure opportunities.

There would be little meanwhile space other than property guardianship in London if it weren't for local authorities and developers, who have largely driven the supply of meanwhile space in the capital: together they host two-thirds of the meanwhile projects in our knowledge base, and mostly in inner London. Other private landowners, and large public sector landowners have been slow to invest in meanwhile use, let alone open up sites to meanwhile activity, outside property guardianship.

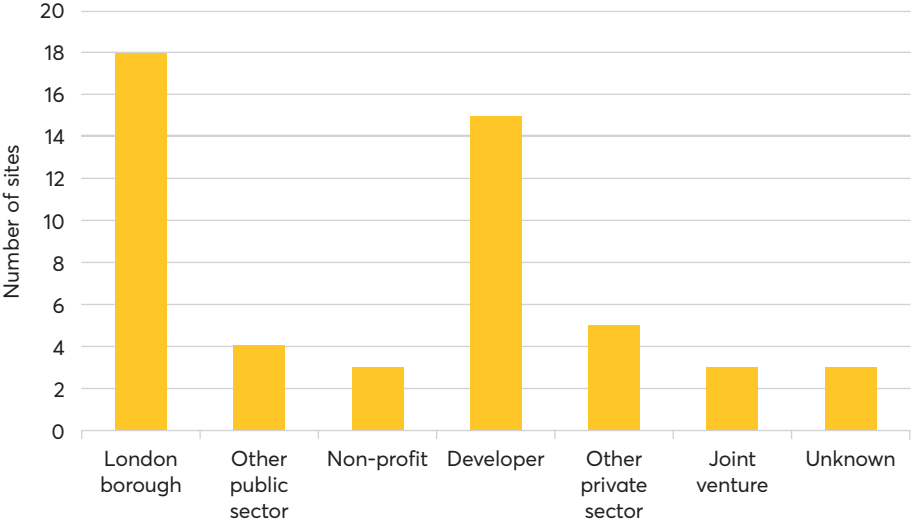
Figure 4: Meanwhile activity in our knowledge base (51 sites), by use type, August 2018



*Amongst the 13 mixed use meanwhile spaces, seven include food and drink, seven include retail space, seven include workspace, four include community space and two include leisure space.

** excluding property guardianship

Figure 5: Landowners of meanwhile space in our knowledge base (51 sites), August 2018



3.

London's wasted spaces

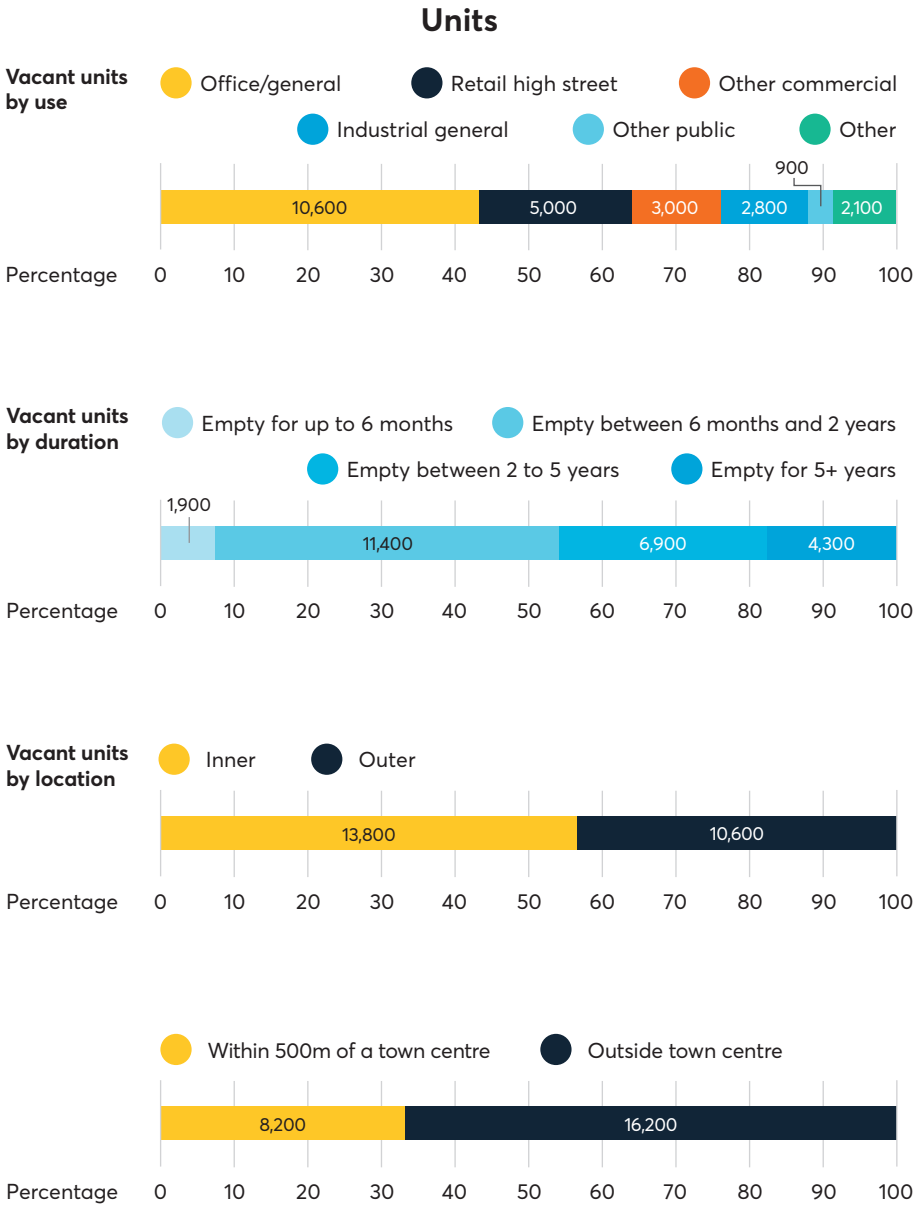
London does not have the problems of long-term dereliction that many other cities are facing – the city has the lowest reported commercial vacancy rate in the country.²⁹ Nonetheless, while land supply may be getting tighter, the capital still has many unused and underused spaces:

- London has a huge number of commercial properties that have been empty for at least six months due to market friction, but also a large stock of “stuck” commercial properties, which have remained empty for over two years.
- London also has an extensive stock of current and future (re)development sites. Around one per cent of London’s land will be developed in the next 10 years,³⁰ and there will be windows of opportunity for meanwhile use before or during redevelopment.
- There is considerable “slack space” – underused space within or between buildings, particularly in outer London – although this is not currently measured.

Empty commercial properties

Using new local government data on empty commercial units,³¹ we estimate that 24,400 commercial units in the capital are currently empty, of which 22,500 have been empty for at least six months. The total vacant floorspace is the equivalent of 27 times that of Westfield London, while the vacant office space alone could provide – based on standard employment density estimates – an opportunity to accommodate between 160,000 and 200,000 workers.³² Some of this reflects market friction, but also that London is full of “stuck sites”: 11,100 units have been vacant for over two years – a total of 2.8 million sqm that represents eleven times the floorspace of Westfield London, Europe’s largest shopping centre.³³ Figures 6 and 7 show the findings of our analysis.

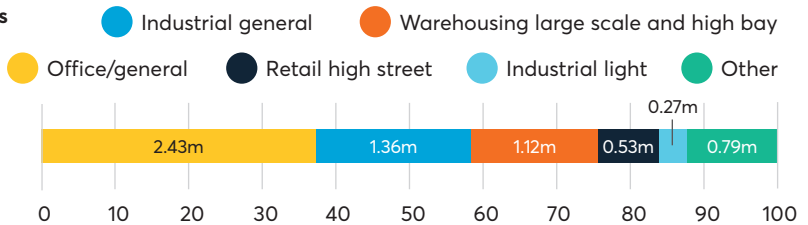
Figure 6: Empty commercial units and floorspace in London



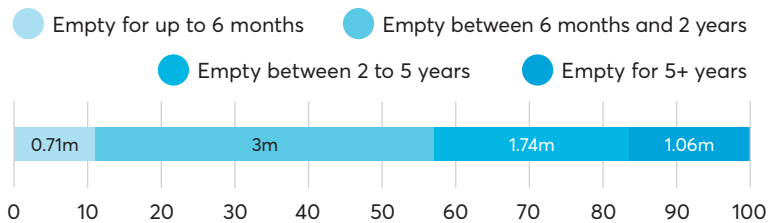
NOTE: to nearest 100 units / 0.01m sqm. Totals may not add up due to rounding.

Floorspace (sqm)

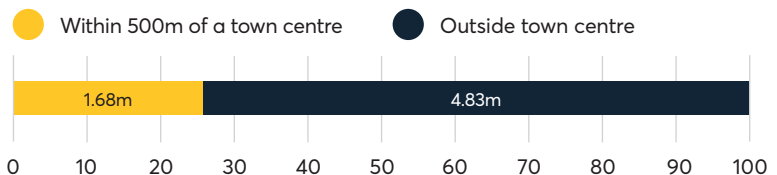
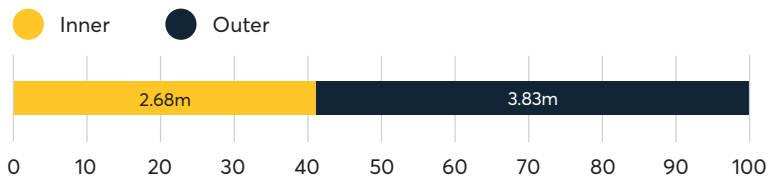
Vacant units by use



Vacant units by duration

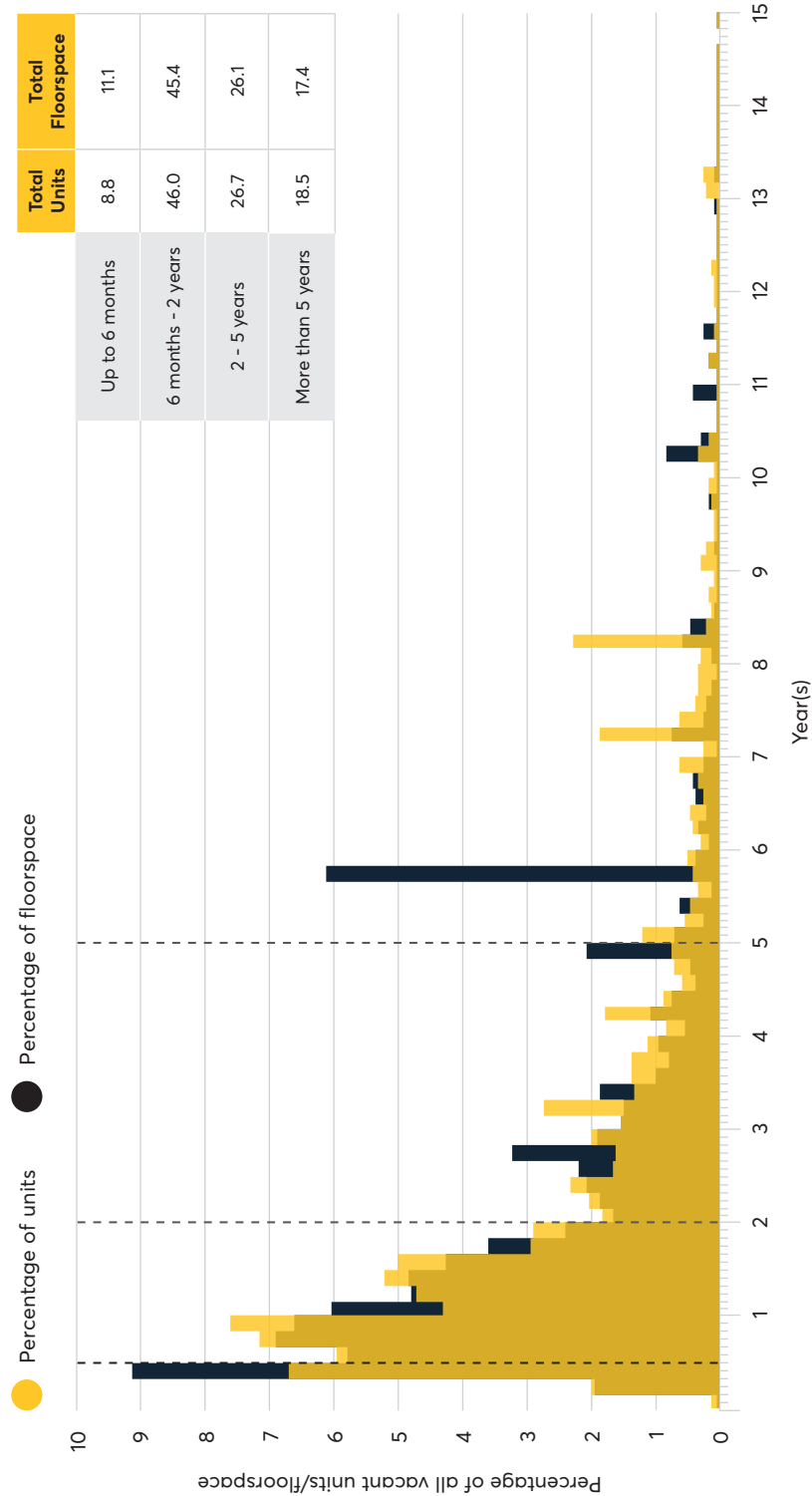


Vacant units by location



The figures are for all London boroughs, estimated from the 18 London boroughs with complete empty property registers. See supporting document on our website for methodology.

Figure 7: Distribution of vacancy lengths across London, in two-month increments



NOTE: Includes only the 18 London boroughs with complete vacancy length data (see supporting document)

Stuck sites are not necessarily stuck because they are isolated. We found that a third of empty commercial properties are in town centres – and not necessarily the less successful ones: the West End, Brick Lane, Hammersmith and Canary Wharf all have over 200 vacancies each.

Development sites

Development sites in London are vacated months, if not years, before construction begins. And on larger sites, some parts remain empty until the last phase of development.

The London Development Database (LDD) tracks sites that have been given planning permission across the capital.³⁴ For 72 per cent of the sites that have been granted planning permission, development has not yet started – representing 2,700ha or the equivalent of the London Borough of Lambeth.

Not all these sites will be suitable for an attractive meanwhile offer – some will have issues of safety or connectivity. If half of the sites with planning permission, but where development has not started gave over between 10 and 60 per cent of their area to meanwhile activity (larger sites opening up a smaller proportion), we estimate that around 400ha of potential site area could be given over to meanwhile uses.³⁵ Most of this opportunity is on small and medium sites (between 0.25 and 5ha), matching the site sizes of current meanwhile uses. And narrowing this potential down to sites near town centres, the potential stands at an aggregate size of 66ha - nearly three and a half times the size of Green Park.³⁶

However, the LDD does not specify when development will come forward on a site that has planning permission; some may be very long-term. Nor does it identify sites that are likely to undergo redevelopment in coming years but have yet to receive planning permission. Another way of estimating the potential for meanwhile activity on development land uses the Mayor's Strategic Housing Land Availability Assessment (SHLAA). The SHLAA estimates that

3,700ha of land in London are likely to be redeveloped for housing by 2041 – a quarter of which will be developed between 2019 and 2024. There is an overlap with the LDD - 54 per cent of sites that are expected to be developed between 2019 and 2024 already have planning permission, thus are also recorded in the LDD. Using the same assumption that half of these sites gave over between 10 and 60 per cent of their area to meanwhile activity (larger sites opening up a smaller proportion), we estimate that 152ha of space could be given to meanwhile uses over the next five years.³⁷ When only looking at sites near town centres, this was 44ha, over two and a half times the area of Green Park, or space for 120 Boxpark Croydons.

The majority of meanwhile uses last between one and three years, so the structures and incentives need to be in place now to enable meanwhile activity on these sites. This is particularly pressing for the 54 per cent of Phase 2 sites (and 68 per cent of aggregate site area) that already have planning permission. These numbers could be even higher if meanwhile use becomes more mainstream and is more routinely offered within completed developments.

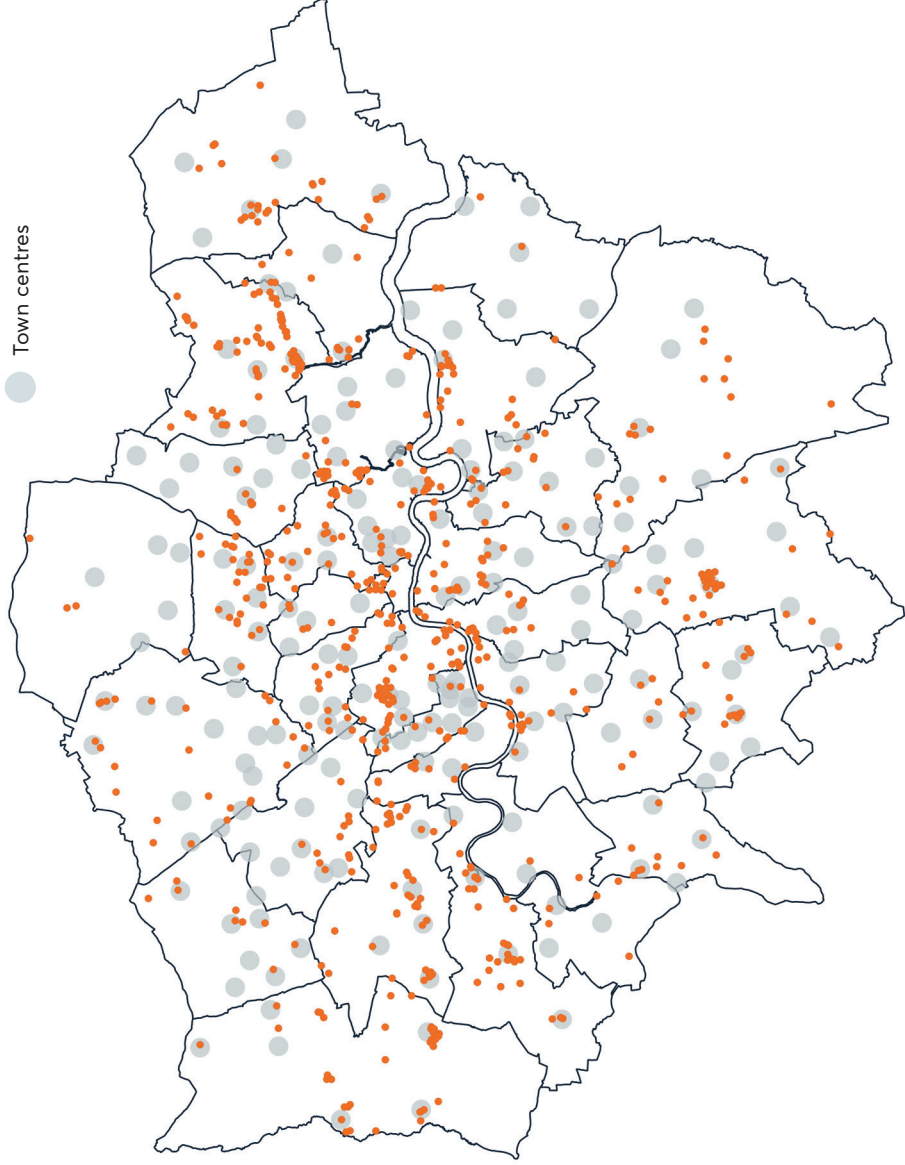
So London's meanwhile use opportunity is huge. London has nearly three million sqm of commercial floorspace that has been empty for over two years. On top of this, 2,700 hectares of land – the equivalent of the London Borough of Lambeth – has planning permission to develop, but construction has yet to start. And the GLA estimates that 900 hectares will be redeveloped for housing over the next five years. Not all of these sites will be suitable for meanwhile activity – but for those that are, most will be empty for months, if not years, before construction starts. And that is before taking into account small sites and 'slack space' – underused buildings or spaces between buildings – which is not recorded. We also expect the opportunity for meanwhile use to increase steeply in the next decade, as changes in consumer behaviour reconfigure high street retail.

Meanwhile use could be a particularly powerful force for change in outer London. Whilst both inner

Figure 8: Future development sites and town centres (500m radius)

Mayor's Strategic Housing Land Availability
Assessment (SHLAA) Phase 2 sites

Town centres



and outer London town centres have large numbers of empty commercial units, most meanwhile schemes so far have taken place in inner London. And the city's largest development opportunities are in outer boroughs, leaving time and space for several iterations of meanwhile projects to take place.

London has considerable latent demand for affordable space,³⁸ as well as plenty of empty and underused space currently, and will likely have more in the future. To understand how this opportunity can be realised, the next section looks at what is holding the meanwhile sector back.

4.

Barriers and hurdles

Why can't London make better use of its empty and surplus spaces? Our research interviews identified three types of hurdles: landowners often overestimate the risks and undervalue the benefits of giving over a site to meanwhile use; the planning and licensing systems can make meanwhile projects difficult to undertake; and the lack of larger meanwhile use operators limits capacity to take over sites and manage meanwhile activity. We interviewed 15 managers and executives working for London's bigger housebuilders and public organisations that own land in London, and 10 operators of meanwhile activity, to understand the hurdles they face, the benefits they derive, and how they could be encouraged to undertake more meanwhile activity.

Misaligned perceptions

Meanwhile use in London is in a state of transition. London landowners are becoming acquainted with it, but perceptions on the risks and rewards of meanwhile use are misaligned – and holding meanwhile activity back. We were surprised to find that most London housebuilders have opened at least one of their sites to meanwhile use. These landowners understood well the benefits that meanwhile use can bring, and their experience was largely positive – but the landowners that had no or little experience enabling meanwhile use were hesitant in doing more.

Amongst the latter, risk dominates internal conversations about meanwhile use. This isn't surprising: asset managers are wary of opening up strategic sites to third party organisations in an industry focused on minimising risk, especially if the rewards do not register on the balance sheet. One developer described why their industry is slow to grow its practice of meanwhile use:

"There is always a risk factor within meanwhile use. It's always riskier than non-meanwhile. Some organisations won't want to carry that risk."

**Asset Management Director,
large private developer**

Landowners are particularly concerned about public-facing meanwhile activities taking root. They know legal powers will enable them to take control of the land as and when they need it, but they are worried about the political backlash and negative PR, at a time of low trust in the development industry.³⁹ However, actual cases of controversy over exit are exceptions, not the rule. Out of a hundred sites, we only found three examples⁴⁰ of community opposition to the closure of meanwhile activity. Experienced meanwhile use providers have built a reputation of smooth management and exit, on which they rely to find more sites. As one sector expert analysed:

"If you get the right licence, there is no impediment in getting your land back. Ask landowners if they ever had major problems with this. They won't come up with actual negative stories of meanwhile uses."

Meanwhile use sector expert

A few housebuilders also mentioned the uncertain nature of development, and how they fear that committing to a fixed-term meanwhile activity might constrain their future options – if they need to remove the meanwhile use early. As a large developer engaged in meanwhile noted:

"The main barrier lies in the unpredictability of development – which means developers cannot guarantee a length of lease – therefore have a low commitment to meanwhile."

Asset Management Director, large private developer

But meanwhile operators noted that this leads to many missed opportunities, because the development industry has an "optimism bias": it always takes longer to go through planning permission, consultation and contract out works than originally planned. We heard stories of meanwhile sites closing down, and then laying empty for another year.

"There's a perception that development is going to happen a lot quicker - but no one admits to that upfront."

Managing Director, small private developer

Landowners often do not perceive the benefits of meanwhile activity. Considering the economic and social value of meanwhile use requires taking a broader view of the development business model – and even then, there is a dearth of robust intelligence on the value of meanwhile use, compared to a “do nothing” scenario. Yet, housebuilders with experience of implementing meanwhile use schemes saw the benefits of meanwhile use in changing the image of an area and reinforcing the visibility of a project, as well as their own brand. As one housebuilder suggested:

"Meanwhile is brilliant for us, it starts to establish a place, letting people into the site, which becomes part of people's mental map."

**Development Director,
large private developer**

Landowners also cited positive examples of the effect that meanwhile uses had on placemaking, while other benefits they saw included trying out tenants, improving safety, and creating a sense of community.

Despite a booming decade for meanwhile activity, the dominant perception amongst London landowners is that meanwhile use creates a large risk for a small reward – yet the actual experience of housebuilders that have implemented meanwhile activity is the opposite, especially for public-facing initiatives. The property guardianship sector, which is more mature, shows that landowners' perceptions can improve, and the last section of the report suggests ways to achieve that change.

Planning, licensing and leasing

The planning and licensing system plays an important role in protecting residents from the negative impact

of urban change. But there are elements of the system that make meanwhile use opportunities more difficult to realise, by narrowing the window of opportunity for meanwhile activity. The statutory target for dealing with a planning application is eight weeks for a minor scheme, which is met for 85 per cent of schemes.⁴¹ Yet, eight weeks is a considerable wait for meanwhile uses that only have a year on a site:

"Timing is crucial – every week that we don't get the space harms the equilibrium of this project."

Director, meanwhile use operator

And meanwhile options tend not to be prioritised within local planning departments, given resource constraints and the overriding priority that most attach to increasing housing delivery.

Our interviewees also mentioned hurdles arising from planning law itself. There is flexibility in UK planning and licensing rules: when repurposing a building, permitted development often allows commercial to residential conversion without planning consent, and local authorities that seek to encourage meanwhile activity can grant temporary planning or licensing consent for uses that will be in place for a few years only. But use classes, which define what type of activity is allowed on specific sites or buildings, are hindering meanwhile activity: it is difficult to ask permission for an as-yet-undefined use. We talked to public sector planners who were themselves frustrated by how rigidly the planning system treats meanwhile use:

"There is an issue with the planning side. When trying to develop a large-scale meanwhile strategy, it was one of the big stumbling blocks. There were dozens of different uses, every one needed a planning application. Think of very local entrepreneurs – it definitely put them off."

Head of Planning, a London planning authority

Whilst repurposing buildings can often be done without planning permission, getting planning permission for new temporary buildings is difficult, because schemes are held to the same standard, and go through the same process as permanent buildings. This was mentioned by several interviewees, including the Financial Director of a London university:

"Right now it is harder, longer, more complicated to get planning permission for meanwhile use than for a permanent building. You're expected to deliver benefits of permanent development while you're also extremely time-sensitive."

Financial Director, London university

Licensing is also a barrier for the meanwhile uses that need evening or late-night licenses. One meanwhile operator argued that more "*flexibility and common sense*" was needed to shake up the rigid licensing system. Like planning applications, meanwhile use operators must still go through the standard licensing process, which can delay the implementation of meanwhile uses. Temporary events licences last for seven days, meaning that all meanwhile uses need a permanent licence, which can be a lot tougher to obtain in some parts of London.

A further issue relates to leases. For sites that are under-used rather than vacant, current lease agreements do not allow tenants to sublet their slack commercial space without landlord consent – this an issue especially in parts of the city where demand for commercial space has weakened.⁴² Indeed, it is nearly impossible for a building manager to set up short-term leases for smaller units within floors or buildings, and landlords are unwilling to sublet below market values, for fear that accommodating a sub-market element will cause an overall drop in the value of the space. Increasing the flexibility of commercial leases will be a growing issue given changing demands on London's office and retail space.^{43, 44}

Market immaturity

Compared to other property and development markets, the meanwhile sector is new and evolving, with only a small number of brokers and operators. To realise the potential of meanwhile use, there will need to be larger meanwhile space operators in London, who can assemble and manage a portfolio of sites.

We asked providers and operators of meanwhile space about what is hindering their growth. Their role, resembling that of a broker, is the most difficult: they have to identify assets, persuade landowners to open up their land to meanwhile activity, carry the risk of investment, break even over an unknown time period, and manage relationships with tenants and users, local authorities and neighbouring communities. A meanwhile operator mentioned how risky their last project was:

"The investment for this site was £400k, and we had to start work with no security that the lease would be going ahead."

Director, meanwhile use operator

A high-quality broker can be the difference between a meanwhile opportunity getting off the ground, and it just remaining an idea.

Larger meanwhile operators can balance cashflow and risk across a portfolio of sites. While the property guardianship sector has matured in that way,⁴⁵ other meanwhile spaces are most likely managed by small operators that work across a few sites – and often only one at a time. This means that finding space and tenants is reactive and stop-start, which in turn constrains their activities' legacy: while the meanwhile offer is inherently temporary, most schemes aim to have a lasting impact, but without a portfolio of sites to move onto, impact and revenue can quickly ebb away.

Meanwhile operators also spend considerable time scouting for new sites. Information on empty commercial units is particularly difficult to access. London local authorities have intelligence about empty commercial units (since these are not liable for business

rates), but they record it in different ways, some do not record it at all⁴⁶, and those that do are holding back information. As of June 2018, only the London Borough of Barnet publishes this data on a regular basis.

Tax incentives

The property tax regime also limits the growth of non-residential meanwhile use. Currently, meanwhile activities are liable for business rates if the space they occupy was previously liable for business rates, regardless of whether the meanwhile activity is a business or not. Not only is this a disincentive to providing non-market meanwhile uses – such as an exhibition or community space, we also found that for many meanwhile projects, the business rates bill has become the main operational cost.

The system has perverse outcomes: by demolishing a commercial building early, landlords can stop paying business rates, rather than giving the building over to meanwhile activity. Alternatively, many choose to install property guardians, making the building liable to council tax, which is up to 99 per cent lower than business rates.

Together, these hurdles are preventing a wider uptake of meanwhile use across the capital. There is a role for policy in incentivising the capital's landowners to make more of the opportunity of London's slack space, but also in making meanwhile activity easier to achieve. The last section offers a list of actions to scale up meanwhile use in London.

5.

Scaling up

Meanwhile use happens where interests align – when a landowner or housebuilder is willing to use their space efficiently, where there is political will, and a project promoter able to demonstrate impact and support risk. This section suggests ways for the public, private and third sector to make the use of empty space routine rather than exception.

Making the case and raising awareness

Meanwhile use is an adolescent practice in London: most of the developers and local authorities that open up their land to meanwhile activity do not have much experience of doing so, and many landowners do not see it as an attractive opportunity. We think the Mayor and the GLA should lead the way in showing how meanwhile use can deliver benefits to Londoners and guide local authorities in doing the same.

An annual meanwhile competition to improve London

Part of the matching issue relates to the lack of awareness of meanwhile uses' value – or high sensitivity to risk – amongst landowners and some London local authorities. The Mayor could do more to raise awareness of the value of meanwhile use and support local authorities that seek to promote meanwhile use.

The Mayor, in partnership with London boroughs should invite bids for "stuck sites" across London that are in public ownership, and should award the space for peppercorn rent to projects that further Good Growth aims.

The Mayor should invite London boroughs and public land owners to put sites forward for the meanwhile use competition, with the aim of covering every borough in a five year cycle.

The Greater London Authority should lead the way by opening up their empty sites or those that will be developed with partners, to meanwhile uses that further Good Growth aims.

Case study 3: Reinventer Paris

The City of Paris has pioneered a competition to revive disused sites and unloved public spaces. For its second edition in 2017, the City auctioned leases on 34 sites owned by public bodies in the capital – from power and metro stations, to a 17th century mansion – in exchange for architectural, economic, cultural and social value. The City of Paris hopes to unleash creative energy by giving access to vacant sites rather than keep hold of them on security grounds, in a city that is short of space. However, most of the leases offered were long- term, reflecting the scale of investment needed to open up the sites – and perhaps one of the reasons why the competition attracted France’s largest real estate companies, which were very well-represented amongst the 91 laureates.⁴⁷



Installation at Croix Rouge Metro Station. Credit: Vincent Desjardins

Guidance and support for local authorities

The GLA has a panel of design advocates and a specialist assistance team guiding and supporting local authorities in the development process.⁴⁸ A similar team for meanwhile use would support London boroughs and London public landowners with less experience of meanwhile activity to maximise benefits from meanwhile space.

The Mayor should set up a “Meanwhile Advocates Unit” that can offer in-kind support to boroughs’ regeneration teams, perhaps through Public Practice. The support team could provide specific advice on the benefits that local authorities can seek, and on measuring and evaluating social value.

Enabling meanwhile activity

London boroughs and the Mayor can make meanwhile activity easier to undertake for both private and public landowners. In particular, they can help improve the experience of meanwhile use stakeholders at four points of the meanwhile occupation process: site matching, investment, planning permission, and exit.

Open data on empty sites and potential occupiers

We have highlighted issues of site matching – there are plenty of empty sites and potential users prospecting for space, yet the number of matches remains relatively small. The city needs an accurate list of vacant commercial vacancies and potential occupiers – yet only one London borough releases regular data on commercial vacancies.

London boroughs should harmonise their business rates records and release regular data on empty commercial units, which should be compiled by the Mayor on the London datastore.

London boroughs should also keep a register of interest for meanwhile space.

Planning and licensing changes

Many meanwhile use projects are inherently flexible and mutable in nature, and do not sit easily with the planning system, though temporary permitted developments are possible in some cases. Many local authorities take a supportive approach to meanwhile use, however, recognising the need for flexibility and speed, this could be more widely adopted.

The Government should explore allowing more flexibility in temporary changes between use classes to enable more mixed and innovative meanwhile uses through permitted development.

The Government and the Mayor should explore a flexible and fast-track approach to assessing and ensuring mitigation of any local noise, transport or other impacts from meanwhile use. Similar steps could be taken for licensing policy.

Investment

Many meanwhile projects need early investment, to bring a space back into use. Small organisations do not have the cash flow to carry that investment themselves. The current Mayors' regeneration fund, the Good Growth Fund, awards £70 million of match funding over three rounds of call for ideas, in three years. The Mayor has funded many of London's meanwhile projects to raise their ambition, often through reimbursing investment costs. A few projects have received funding or loans upfront, but this was an exception. The regeneration fund could be improved in order to reach smaller civil society projects.

The Mayor should make Good Growth funding available to meet upfront costs, and should operate funds on a rolling basis, so project promoters can bid at any time.

Smooth exit

Landowners know that meanwhile use won't slow down development – but they are worried that meanwhile activity may take root and feed opposition to development. Professional meanwhile use operators have built trust through a track record of successful meanwhile occupations, but learning how to live with the ambiguity of working or enjoying a temporary space does require frequent liaison and the management of expectations.

The Mayor should draft and promote a "Good Practice Code of Exit" to strengthen trust between landlord and occupier.

Creating incentives

Both public and private landowners could open up their empty land and underused space to meanwhile activity – if incentivised by property taxes and regulation.

Tax incentives

As discussed in the previous section, business rates provide an incentive against giving vacant buildings over to mixed meanwhile uses. While commercial buildings can get three-month exemptions from business rates, and some buildings get indefinite exemptions or discounts, such as listed buildings, or buildings owned by charities and destined for charitable use, the business rates system should recognise that meanwhile use has social value too.

Not-for-profit meanwhile projects that generate social value should be exempt from business rates in their first two years on a site.

"As a local council, you have to invest in the community. How do you get young/old people to start a business? Do you accept that you will forgo some revenue in the short-term, or do you leave it to the market, and the local authority just becomes a tax collector?"

Local authority regeneration manager

Regulatory incentives

A presumption in favour of meanwhile use would enable local authorities to factor in the expectation that landowners should consider meanwhile activity and would enable authorities to negotiate informally with planning applicants.

London boroughs should make clear in local plans that they expect landowners applying for planning permission to open up space to meanwhile activity.

There are other ways of encouraging landlords not to leave space empty or underused in a valuable land market: by incentivising civil society to look after "stuck space".

The government should look at how other countries treat temporary occupation on long-term vacant commercial land – and review whether the legal framework around occupation of vacant commercial property could be reformed in order to allow non-damaging uses of longer-term empty commercial properties.

The 1954 Landlord and Tenant Act makes it difficult for businesses to share or sublet space at below market value without the consent of the landlord, which makes the use of commercial space inflexible.

The government should reform the 1954 Landlord and Tenant Act to encourage landlords to allow shared use of commercial space.

New players

The property industry and Business Improvements Districts have yet to realise the full potential of meanwhile use – they could become major operators of workspace and public-facing meanwhile use in the capital.

The property industry

While the property guardianship sector has attracted and grown larger guardian companies, public-facing meanwhile activities have been left to smaller players. There is a big opportunity for the property industry to operate meanwhile uses. For medium and large developers, meanwhile use is a low-cost, low-risk investment that can create value by generating activity, shaping social infrastructure in new developments, and boosting corporate patronage. As land value growth is more sluggish and build-to-rent gains momentum, establishing successful meanwhile activity will likely become a decisive competitive advantage in the property industry.

Business Improvement Districts

Business Improvement Districts are well-placed to operate start-up space on a meanwhile basis: their business rates levy provides them with a five-year source of income, and they are well-networked in the local business community.

Business Improvement Districts should invest in empty commercial properties to offer low-cost flexible workspace and retail space.

Case study 4: Camden Town Unlimited, NW1

Camden Town's Business Improvement District is running Camden Collective, a charity offering free workspace to entrepreneurs by bringing empty buildings back into meanwhile use. Collective's mission is to retain Camden Town's ability to nurture innovative businesses. Camden Collective is transitory – they have managed over a dozen properties in the town centre, and have supported more than 500 companies.



Camden Collective. Credit: Gyles Glover



Les Grands Voisins. Credit: Guilhem Vellut

Case study 5: Les Grands Voisins, Paris

Les Grands Voisins created a new piece of city in an empty hospital, and shows that meanwhile activity can successfully take over large urban sites, when bigger organisations enter the meanwhile sector. The buildings of a Parisian hospital were turned into temporary homeless accommodation for 600 people, low-cost workspace for 250 entrepreneurs, three restaurants and bars catering for 1,000 visitors a day, an events space, and a welcome centre for refugees. For Aurore, a charity provider of homeless accommodation, and the two collectives who manage the site – Plateau Urbain and Yes We Camp – Les Grands Voisins connect a social duty, a startup space and leisure uses, thus offering temporary accommodation on a lively site, opportunities for volunteering, and neighbourly interactions between groups often set apart.

Aurore received €300 million of funding to operate the temporary accommodation, whilst the remainder of the €1.8 million annual revenue is raised from workspace, restaurants and bars. A big draw to opening up the site was the €1 million annual savings in security costs.⁴⁹

The ambitious project took several years to realise – and the exit strategy for a large meanwhile scheme is challenging, but the experience has prompted the French government and a public investment bank to investigate how they can use meanwhile sites for temporary homeless accommodation nationally.⁵⁰

Case study 6: Godsbanen, Aarhus

Meanwhile use has been central to the development of Aarhus's new innovation district, Aarhus K. As part of their vision for the redevelopment of the former goods yard, the city and philanthropist Realdania have invested in a centre for art and cultural production. The grounds also house a collective of startups previously resident on site, Institute for (X), and soon a campus of the Aarhus School of Architecture. The renovated buildings provide a long-term structure for temporary activity: the programme and occupiers of Godsbanen are expected to change as the neighbourhood is gradually built out. At the moment, Godsbanen offers a single roof for an exhibition and performance space, studio and makerspaces, a restaurant, open workshops and guest apartments for residencies. 70 people rent an office on site, the university and training provider use the makerspaces for workshops, and since its opening in 2012, 130 start ups have been registered at Godsbanen.⁵¹

Meanwhile use in London and other cities will grow, even without public intervention. In periods of bust or in declining neighbourhoods, it will be about finding new ways of occupying vacant land and improving or activating places. In periods and places of boom, it



Godsbanen. Credit: Jenniferjoan

provides an affordable space offer, thanks to the city's trickier, but no less interesting spaces. This means that meanwhile use also has the potential to benefit a wide range of other UK cities.

Yet, in London, meanwhile use could go from relatively small scale to one of the main pillars of inclusive citymaking. But for this to happen, both the public sector and private sector have a role to play. Local authorities have limited resources, but they hold land from which they could derive social and cultural value. City and national governments can also make meanwhile use less risky to undertake, and for themselves easier to regulate. They can incentivise

landowners to open up their empty land – to an increasing number of trustworthy meanwhile operators on the London market.

Scaling up means that meanwhile uses won't always have a local link. But more experienced and larger meanwhile players will also mean lower risk, a larger portfolio of spaces to move onto once an occupation is up, and cross-subsidise other schemes. This is happening in the property guardianship sector, and could become the new standard for the other types of meanwhile use too.

Meanwhile use has value in today's London – as sites pop up and pop down – but also for the future city: meanwhile use can provide the space for London to retain its next generation of entrepreneurs, artists and activists. And there's little doubt that much of what Londoners and visitors will love about future London – its fringe, its social infrastructure, its landmarks – will be conceived, nurtured or trialled in meanwhile spaces.

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Policymakers are usually concerned about empty space in periods of economic bust. This report argues that meanwhile use has a great role to play in periods of boom too. In a city where land is at a premium, meanwhile use can be a way to experiment on the cheap, foster resilient neighbourhoods, and enable a new generation of businesses, artists and community leaders to emerge. Yet, we find that London is full of spaces, small and large, that could be given over to temporary housing, workspaces, parks, gardens and retail – but which are not. Based on extensive interviewing, new datasets and international case studies, this publication offers the first analysis of the extent, the value and the potential of meanwhile use in London.

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