

**Harrow's Regeneration Programme and Housing Profile****Regeneration and housing development**

Harrow's Regeneration Strategy outlines a set of projects that will change the landscape of parts of the borough over the coming years. Within the Harrow & Wealdstone Opportunity Area a £1.75 billion regeneration programme will deliver over 5,500 new homes, provision for two new schools and the creation of around 1,000 new jobs, together with transport improvements, better leisure and health facilities. This area includes Harrow Town Centre, the Station Road corridor (including the Civic Centre), Wealdstone District Centre and the adjoining Harrow Leisure Centre and Kodak Alaris sites.

In July 2021 the Council entered a strategic development partnership with Wates Residential to carry out a ten-year project that will seek to deliver 1,500 new homes and a new Civic Centre across three sites in the borough - Poets Corner (current Civic Centre site); the new Civic Centre site in Peel Road; and the Byron Quarter scheme (Harrow Leisure Centre and adjoining land).

The borough's minimum housing targets, as set out in the London Plan 2011 and Further Alterations to the London Plan (adopted 2014) increased Harrow's housing targets from 350 per annum to 593 per annum from 2015/16, covering the period to 2025/26. This uplift was a result of the significantly higher population and household projections emanating from the 2011 Census findings. Harrow's housing trajectory sets out the borough's progress towards meeting this strategic target (based on previous and anticipated housing completions) and shows that the relevant target has been exceeded every year, over the past five years.

Completions figures for 2020/21 indicate that 720 net additional homes were completed in Harrow in the last financial year. Whilst this was below the number of additional new homes achieved in the previous two years (1,192 in 2019/20 and 1,226 in 2018/19), over 4,530 new homes have been built in Harrow over the past five years. This means that Harrow has surpassed its current London Plan target by 53% over this five-year period (minimum of 593 dwellings per annum).

Harrow's current housing target of 593 has now been superseded by a higher annualised target in the recently adopted London Plan 2021. Harrow's new target over the ten year period 2019/20 to 2028/29 will be 8,020 additional dwellings, giving an annualised average of 802 net additional dwellings. With the delay in publishing this latest London Plan, this new target will now take effect from 2021/22. These targets were based on the findings of the GLA Strategic Housing Land Availability Assessment (SHLAA) (2017), coupled with a London-wide Strategic Housing Market Assessment (SHMA). The latter identified a need for 66,000 additional homes per year across London. However, the Government is pushing the Mayor for an early review of the London Plan to identify additional housing capacity as they consider the Plan falls short of meeting housing need. At a local level, the London Plan target for Harrow (802 homes per year) is much less than what the Government's standard housing methodology suggests our need is (2,538 homes per year). With the bulk of Harrow's large sites currently being built out or likely to be developed over the next five years there is a presumption by the GLA that in the future most of our housing target will be provided on small sites right across the borough.

The current school roll projections uses information supplied by the council to the GLA, based on the 2019/20 Housing Trajectory. This trajectory includes: sites with planning permission; sites with permission but subject to legal agreement; and potential deliverable sites and other identified sites. This trajectory includes the following major schemes, currently under construction: nearly 2,700 units on the Kodak Alaris (Harrow View East) site; nearly 300 additional units as part of the Grange Farm Estate redevelopment; and two major developments in Wealdstone (182 units at 5-11 & 37-41 Palmerston Road and 222 units at 55-59 Palmerston Road) In addition this trajectory includes: a potential 1,100 new units on the Civic Centre site; 600 units in the Byron Quarter scheme; nearly 350 new units on the Royal National Orthopaedic site; and several TfL owned

station/car park sites. However, as none of these schemes currently benefit from full planning permission the number of dwellings estimated on these sites could change.

It is important that school rolls projections are updated to take account of new housing trajectories and Planning will be producing a new housing trajectory in summer 2021. This will take account of new dwellings completed in the borough in 2020/21 and incorporate permissions for new housing development granted in 2020/21 and other schemes in the pipeline.

However it should be noted that when new housing is factored into population projections, it is not a matter of just adding in additional population into the extra dwellings. In the recent housing-linked projections for Harrow, the additional housing development is judged to be sufficient to facilitate continued strong trend-based growth, but not to drive population growth significantly beyond this rate.

Additionally the specific types of units included in Harrow's 2019/20 Housing Trajectory have not been factored into the population projections (for example: the size of the unit; whether they are houses or flats; social or private housing) and therefore the impact of child yield has not been factored into the school roll projections.

**2019/20 Housing Trajectory developments by Planning Area**

Harrow Authority's Monitoring Report for 2019/20 & 2020/21 will contain Harrow's 2020/21 Housing Trajectory. Trajectories show the overall potential housing supply for the borough. The tables below are presented by planning area, including housing developments that propose 50 or more net units by ward. These tables are based on Harrow's 2019/20 Housing Trajectory.

**North East Planning Area**

Main wards: Belmont, Canons and Stanmore Park.

Ward	Name	Net units	Status	Anticipated First completion	Final Completion	Notes (July 2021)
Canons	Brockley Hill, Royal National Orthopaedic Hospital	347	Not started	174 units in 2026/27	2027/28	Outline permission only and no commencement to date, so slippage
	Merrion Avenue, Jubilee House	167	Complete	101 units in 2019/20	2020/21	101 residential assisted/independent living units and 70 residential units (for older people). No child yield.
	Donnefield Avenue, Canons Park Station car park	100	Not started – no planning permission	100 in 2026/27	2026/27	
	London Road, land at Stanmore Station	265	Not started – no planning permission	265 in 2026/27	2026/27	
Stanmore Park	Coverdale Close, Anmer Lodge	120	Residential not started	60 in 2022/23	2023/24	

**North West Planning Area**

Main wards: Harrow Weald, Hatch End, Headstone North, Pinner and Pinner South.

Ward	Name	Net units	Status	Anticipated First completion	Final Completion	Notes (June 2020)
Headstone North	Harrow View, Kodak West (former Zoom Leisure)	314	Work in progress	25 completed in 2016/17	2021/22	290 units completed by end of March 2021. Persimmons anticipate all development will be completed by end of 2021/22

**South East Planning Area**

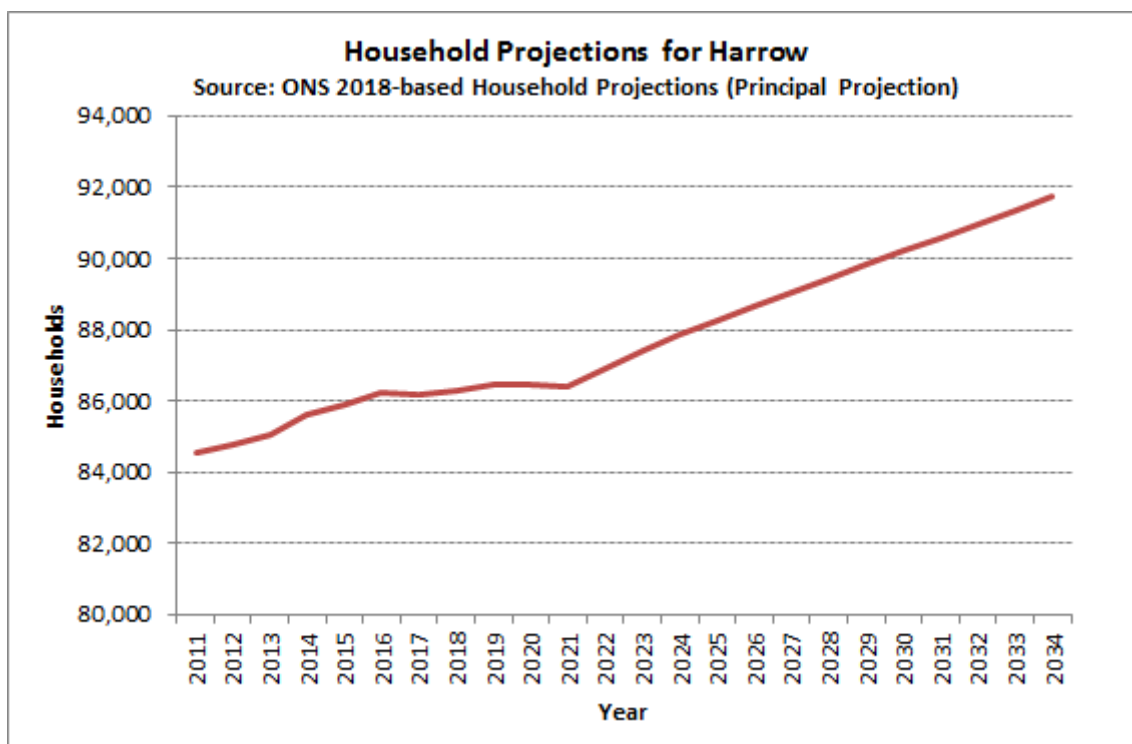
Main wards: Edgware, Kenton East, Kenton West and Queensbury.

Ward	Name	Net units	Status	Anticipated First completion	Final Completion	Notes (June 2020)
Edgware	Middlesex House, 29-45 High Street	165	Complete	2019/20		All complete in 2019/20
Kenton East	Stewart House, Kenton Road, 414-416	58	Not started	2022/23	2022/23	Prior Approval office conversion. Not yet started.

**Housing Profile: Household size & household population projections**

The Office for National Statistics (ONS) 2018-based household projections were released on 29<sup>th</sup> June 2020. The Principal Household Projection variant show lower levels of household growth compared to both the 2016 based household projections (and the 2014-based projections) which they replace.

They indicate that in the long-term households will continue to increase in Harrow, from around 86,400 households in 2020 to 94,900 households by 2043, a 9.8% increase. This is largely to be expected, as the main driver of household projection growth is the projected change in the overall population. However, the projections show that over the period 2015 to 2022 there is likely to be little change in the overall number of Harrow's households, averaging around 86,400 over this period.



The household projections are generally showing decreases in the average household size (AHS). Nationally the average household size is projected to fall from 2.37 to 2.32 in the ten-year period from 2018 to 2028. The ONS 2018-based Household Projections show that Harrow’s AHS is expected to decrease from 2.87 in 2018 to 2.78 by 2028. This level is above the projected national level of 2.32 and the Outer London level of 2.54, for 2028. In terms of rankings the projections show that Harrow’s average household size would be the 3<sup>rd</sup> highest in England by 2028, after Newham (2.97) and Leicester (2.8). By 2043 Harrow’s AHS could fall further to 2.66, remaining 3<sup>rd</sup> highest in England after Newham and Leicester.

Harrow’s existing population has grown considerably within the existing dwelling stock in particular and continues to grow, coupled with higher population density levels. The average household size in Harrow increased from 2.6 in 2001 to 2.8 by 2011, levels higher than the London and Outer London averages. In Harrow the number of households increased by 6.6% between the last two censuses.

These household projections use the 2018-based Sub-National Population Projections (SNPP) as the base, which in turn take the mid-2018 population estimates as their starting point. The 2020 Mid-Year Estimates for Harrow (MYE) were published on 25<sup>th</sup> June 2021 and show that Harrow’s overall population increased by 1,178 (0.4%) to 252,338, between mid-2019 and mid-2020, indicating a similar level of growth of 0.4% (1,011) between mid-2018 to mid-2019. These MYEs show a slightly higher population estimate for Harrow, compared to the ONS 2018-based Sub-National Population Projections (SNPP) for 2020, which were published on 24<sup>th</sup> March 2020. As previously mentioned, the household projections referred to in this paper are the 2018-based principal housing projections, but the ONS has also released four further variant projections. These do not replace the principal household projections, but provide a range of alternative scenarios which show the consequences of particular sets of assumptions. Three of the variant projections make different assumptions about migration, whilst the fourth variant projects forward household representative rates (HHR). For Harrow the variant household projections show that by 2026 the total number of households could be as low as 88,100 (using the projected HRR from 2001 to 2041) or as high as 93,000 (using 10-year migration trends).

It should be noted that, with the exception of the 2020 MYEs, all current population populations were produced before the current Covid-19 pandemic, officially regarded as starting in March 2020. The 2020 MYEs only take into account population changes within the first three months of

the pandemic, with the most significant change being a higher number of deaths. The pandemic also occurred at a time when typically population projections are perhaps perceived to be at their weakest, as much of the underlying migration data used in the projections is census-based and all current projections use the 2011 Census, which is now ten years old.

The 2021 Census was taken in March 2021, so the results of this will feed into all future rounds of population projections and lead to a rebasing of MYEs back to 2012. The 2021 MYE will be 2021 Census-based and will be released in September 2021. The ONS has confirmed that the 2020-based Sub-National Population Projections (SNPP) will not now be published, so 2021-based SNPPs will be released in summer 2023. Similarly the GLA's 2022-based Round of Demographic Projections will not be available until summer 2023.

Harrow has a large stock of houses (as opposed to flats), which can be fairly easily extended, via side and rear extensions and loft conversions. In recent years the Government has changed Permitted Development rights so that householders can build larger extensions by obtaining Prior Approval from councils. Such extensions could be accommodating Harrow's growing population to a large extent and leading to lower levels of out-migration. Nevertheless the 2011 Census showed that there are high levels of overcrowding in the borough, although in some cultures this could be more acceptable than in others. Housing supply from all providers increased Harrow's housing stock by an additional 720 homes in 2020/21. In 2019/20 around 1,200 net new dwellings were completed in the borough, just below the 1,226 completed the previous year - the highest and second highest number of completions achieved in any year during the current plan monitoring period (from 2009/10). With the current high levels of house building in the borough this could help alleviate overcrowding and lead to the projected gradual fall in the AHS. However, 47% (622) of the new units (gross) completed in 2018/19 were one bedroom dwellings and only 9% (121) of the total completions had three or more bedrooms.

**South West Planning Area**

Main wards: Harrow on the Hill, Rayners Lane, Roxbourne, Roxeth and West Harrow.

Ward	Name	Net units	Status	First completion	Completion	Notes (June 2020)
Harrow on the Hill	Grange Farm Estate	302	Work in progress on Phase 1	35 in 2020/21	2023/24	Phase 1 start in 2020/21, so slippage
Rayners Lane	Rayners Lane/High Worples, part of Rayners Lane Station car park	127	Not started – no planning permission	127 in 2026/27	2026/27	
Roxbourne	Alexandra Avenue, 219, former Matrix PH	60	Complete	2019/20	2019/20	All complete
	Northolt Road, 152-174, Townsend House & Eaton House	116	Complete	2019/20	2019/20	All complete
	Northolt Road Business Use Area (North and South), South Harrow (EM1 part)	241	Not started – various sites - not all covered by planning permissions yet	100 in 2023/24	2027/28	

Central Planning Area

Main wards: Greenhill, Headstone South, Marlborough and Wealdstone

Ward	Name	Net units	Status	First completion	Completion	Notes (July 2021)
Greenhill	St. Johns Road, 1-3, Cumberland Hotel	200	Complete	2020/21	2020/21	All complete
	Woodlands Road, Watkins House & former Sea Cadets site	78 flats (56 in extra care unit); plus 22 flats incl 2 wheelchair units with no age restriction	Work in progress	2021/22	2021/22	Work commenced in 2019/20. Child yield unlikely or very low.
	Harrow-on-the-Hill Station area	600	Not started – no planning permission	300 in 2026/27	2027/28	Pre-app discussions with TfL only – no identified developer
	Gayton Road, Gayton Road car park, Sonia Court & former library site	346	Complete	128 in 2018/19	2019/20	All complete
	Kymberley Road, Queens House	92	Complete	2020/21	2020/21	All complete
	Congress House, Lyon Road	54 (office conversion)	Work not started	54 in 2022/23	2022/23	Pre-app discussions on new build scheme could yield over 200 units
	Greenhill Way, Car Park South	90	Not started – no planning permission	90 in 2026/27	2026/27	
	College Road, 15-29 (Phase 2), adj former Post Office	94	No permission yet. Work not started.	94 in 2026/27	2026/27	
	Tesco/Cinema/V2V Community Church, Station Road	668	Work started on former cinema site in 2020/21.	78 in 2023/24	2025/26	Uncertainty over Tesco scheme
	Lowlands Road, 59-65, The Heights	119	Work not started	119 in 2022/23	2022/23	Office conversion

	Lowlands Road, 33-39	104	Work not started – permission granted April 2021	104		Co-living units so child yield unlikely
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Ward	Name	Net units	Status	First completion	Completion	Notes (June 2020)
	College Road, 118-134 & Headstone Road, 5-9	70	Work not started.	70 in 2020/21	2020/21	Prior Approval for office conversion now lapsed
Headstone South/ Greenhill	Pinner Road, 12-22, Quality (Harrow) Hotel	64	Complete	64 in 2019/20	2019/20	Complete
Marlborough	Harrow View, Kodak East	2,686	Work in progress on Phase D7 & B1. Phases A, C1, D1, D2, D4, D5 and D6 have permission too.	78 units completed in 2020/21	2025/26	156 units completed in total by end of March 2021 in Phase D7.
	Palmerston Road, 5-11 & 37-41, Masons Avenue, 27-33 & adjacent 47	182	Mayor has given permission re P/1619/16. Work in progress.	90 in 2021/21	2022/23	Work commenced in 2019/20, so completion possibly 2022/23
		56	Remainder of Site 6 – no planning permission	56 in 2026/27	2026/27	
	Palmerston Road, 55-59	222 co-living units (sui generis use). Counted as 74 housing units.	Work in progress	2021/22	2021/22	Work commenced in 2019/20. Unlikely to be child yield from this development
	Canning Road, Premier House (part 2 <sup>nd</sup> , 3 <sup>rd</sup> & 4 <sup>th</sup> floors)	55	Work not started	55 in 2022/23	2022/23	Not started
Christchurch Avenue, Leisure Centre, associated land &	600	No permission yet. Work not started.	150 in 2025/26	2027/28		

	buildings and former Driving Centre site (aka Byron Quarter)					
	Station Road, Civic Centre (aka Poets Corner)	1100	No permission yet. Work not yet started.	360 in 2025/26	2027/28	

NB. The Harrow View, Kodak East and Station Road, Civic Centre developments have new schools included in the plans.

The impact of the developments included in Harrow’s 2019/20 trajectory is unlikely to be immediate and surveys are likely to be needed to ascertain the potential impact on school places in the mid to long term future.