

Broxbourne, Dacorum, Hertsmere, St. Albans, Three Rivers, Watford and Welwyn Hatfield Councils

HERTFORDSHIRE LONDON ARC JOBS GROWTH AND EMPLOYMENT LAND



ROGER TYM & PARTNERS
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Appendices

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APPENDIX ONE

Note on Forecasting

FORECASTING METHOD

The model used in generating employment forecasts for this report was developed in 2007 for EEDA. Known as the East of England Forecasting model, it is a computer-based set of data for the common variables and a system for modelling the inter-relationships between these variables, with the capacity to generate forecasts and scenarios for each the variables at regional and local scales. The model is constructed primarily on an Excel spreadsheet and can thus be run on any personal computer. The economic relationships underpinning the model were primarily derived from Oxford Economics commercially available Regional Economic Model. Additional estimation at a local level was carried out for this project and applied to the Excel model.

A full description of the model is contained in the final report for the EEDA project 'East of England: Joint Modelling for the RES and RSS', on the EEDA website at www.eeda.org.uk/files/Joint_RES-RSS_modelling_final.pdf. The main features of the model are:

- A full database including 126 separate variables for each of 50 individual areas (i.e. 48 local authority areas plus the East of England region and UK) or 6,300 variables in all.
- A scenario generating capacity which allows users to change assumptions in order to generate alternative assumptions

Scope of the Model

Time periods

Annual data from 1991-2006 where available
Annual forecasts from 2007-31

Geography

UK (limited set of variables)
East region
London, South East and East Midland regions (total employment).
Local authority districts within the East of England region.

Variables

Employee jobs¹ by 28 sectors on a workplace basis full-time and part-time (5 sectors)²

Self-employed jobs by 28 sectors on a workplace basis
Employment includes employees, self-employed and HM forces.

¹ By jobs we mean a filled position. Employed people may hold more than one job. Vacant positions are not recorded as a job.

² Employee jobs are directly comparable with the Government's Annual Business Inquiry (ABI). As in the ABI, figures up to 2005 relate to December of each year and those from 2006 onwards to December. This discontinuity is not a problem, because the difference between September and December is insignificant (in 2006, for example, it amounts to some 1% of employment).

Employed persons on a residence basis (consistent with census 2001). Includes self-employed

Employed persons on a workplace basis (consistent with census 2001). Includes self-employed

Employment rate on a residence basis (16-74 definition³, consistent with census 2001)

Unemployed (claimant count) Claimant count figures are less variable over time than the ILO and are consistent with the regional model forecasts

Net commuting numbers (employed persons on a workplace basis less employed persons on a residence basis, consistent with census 2001)

GVA by 28 sectors on workplace basis (consistent with NUTS 3 data)

Productivity by sector (GVA per employed person⁴, workplace basis)

Population - split into working age⁵, 16-74, children and retired, 60+, 65+

Migrants - (domestic and international separately at regional level)

Natural increase in population

Households

Average household size

Dwelling stock

Sectors

No	Sector	SIC
1	Agriculture & fishing	01-05
2	Extraction	10-14
3	Food, drink, tobacco	15,16
4	Other Low tech manufacturing (textiles, wood, paper, printing & publishing)	17-22
5	Chemicals and process industries (nuclear fuels, minerals pdts, chemicals, rubber/ plastics,)	23-26
6	Metals & Engineering (metals, machinery, electrical, optical transport equipment, other)	27-35
7	Other manufacturing & recycling	36,37
8	Utilities	40-41
9	Construction	45
10	Whole-sale, Distribution	51

³ Although employment rates have traditionally been expressed relative to working-age population, this is becoming less appropriate as more people over retirement age are in the workforce. We use a 16-74 definition for both males and females. This includes the post-retired potential workforce and also allows for future changes in the female retirement age. This employment rate is also used in calculating employed persons on a residence basis, which in turn is used in calculating annual figures for net commuting.

⁴ Note: per employed person means per employed jobs as employee jobs and self employed are added together as an individual may hold more than one job.

⁵ Working age means 15-59 and 15-64 currently but over time this changes in line with government definitions.

11	Retailing, Sale & maintenance of motor vehicles	50,52
12	Hotels and catering	55
13	Land transport and other transport	60,63
14	Water transport	61
15	Air transport	62
16	Communications	64
17	Finance	65-67
18	Business - real estate, renting	70,71
19	Business - computer related	72
20	Business - labour recruitment, security, cleaning	74.5,74.6,74 .7
21	Business - R&D, technical testing	73,74.3
22	Business - other tradable (legal, advertising, architecture)	74.1, 74.2, 74.4
23	Business - other (inc. call centres)	74.8
24	Public administration	75
25	Education	80
26	Health and social work	85
27	Waste disposal	90
28	Miscellaneous services	93-99

Projection Methods Used in the Model

Workplace jobs - Workplace jobs for each sector and district are derived by extrapolating past trends in either *shares or location quotients (LQs)*:

- For local service sectors - those that serve mainly local markets - the model extrapolates LQs. Employment-based LQs are the district's share of the sector's employment in the region divided by district's share of total employment in the region, and are used for local business (producer) services, Population-based LQs are the district's share of the region's employment in the sector divided by the district's share of the region's population, and are used for services that serve local households, including retail, leisure and public services.
- For service sectors, the model projects past trends in LQs. ((The LQ is the ratio of the sector's jobs to population, or to total employment, relative to the same ratio at regional level.) In service sectors that serve business most private service sectors, the LQs are employment-based. In those private services that serve households rather than businesses, and in public
- In cases where the location quotient has a particularly high value the projected values are usually replaced by a value close to unity⁶. This is

⁶ The 'exceptional' element of employment e.g. the airport or university is projected independently.

because location quotients are used to project employment through multiplying them by changes in local total employment or local population. This can result in unrealistic estimates in a few cases where LQs are very high. An example would be retailing in Welwyn Hatfield where the LQ is very high because of the presence of the Tesco HQ.

Employed persons on a workplace basis - The number of employed persons is projected as the number of full-time workplace jobs plus 0.7 times the number of part-time jobs plus 0.94 times the number of self-employed jobs all multiplied by the census scaling factor⁷. The proportion of part-time employees is projected as a trend for individual sectors in each district.

Employed persons on a residence basis - The projected number of employed people on a workplace basis in each district is allocated to each district as residents on the basis of commuting numbers for employed persons from the 2001 census. The 2001 commuting proportions are used for all forecast years i.e. this assumes commuting proportions which are unchanging

Net commuting - projected as the difference between projected persons employed on a workplace and residence basis.

Resident's Employment rate - projected as the number of employed people on a residence basis divided by the population aged 16-74

Productivity - productivity in any given sector is defined as GVA divided by total employment and is projected to grow at the same rate as Oxford Economics forecasts for the same sector in the East of England regions. This applies at both regional and local scales.

GVA - GVA is projected as the product of productivity multiplied by workplace employment in each sector and area. In addition ownership of dwellings and the financial adjustment are allocated from the regional level in proportion to population and overall GVA levels respectively in each district.

Population - projections use official projections of natural increase plus forecast numbers of migrants (broken down by domestic and international at regional level)⁸ Working age population is calculated similarly using official projections of natural increase for the working ages plus a proportion of economic and non-economic migrants in each area. The population aged under 16 are projected using an annual ratio of children to working age people. The population aged 16-74 is based on the census figure for 2001 updated annually by the projected growth of the population aged over retirement age (obtained as a residual of total population less working age and young people).

⁷ In Hertsmere and some other districts an average scaling factor is used - see previous footnote.

⁸ Note the 2006 population and components of change data (plus revised 02-05 data) released on 22nd August were not included in this release of the model and projections.

Migrants - projected using equations. At regional level the unrestricted baseline forecast depends on wages, house-prices and unemployment, all expressed relative to the UK average. At district level the number of migrants is the sum of two components:

- Economic migrants:
- Non-economic migrants

The number of *economic migrants* into each district in any year is determined by the following equation:

Previous year's population multiplied by [0.02 - 0.83 X (the previous year's number of unemployed divided by the previous year's population of working age)]

This says that the number of migrants into a district would be 2% of population if unemployment was zero, but will be less where unemployment is higher. Unemployment rates below 2.4% will result in net in-migration. Unemployment rates above 2.4% will result in net out-migration. Any change in employment or population which tends to increase unemployment will result in a reduction of net in-migration.

Non-economic migrants are calculated as a residual between observed trends in migration into the district in recent years and the prediction for the district from the above equation. This is a constant for each district which is set at the same level for each future year. For about a third of districts this constant is zero. The constant tends to be positive (at a few hundred a year) in rural or coastal districts, and is negative for urban areas especially in Hertfordshire and Essex. Areas with negative constants will lose population through migration unless unemployment is low enough to induce positive inflows of economic migrants.

Unemployed - The number of unemployed people is projected as the previous year's value plus 0.55 times the projected change in working-age population less 0.45 times the projected change in employment. These coefficients are obtained by an iterative analysis process and one agreed where the most plausible forecasts for unemployment and indirectly also migration are produced. In some districts the coefficient of working-age population differs from 0.55. The fact that these coefficients are less than unity indicates that not all people of working age are seeking jobs. Also, not all additions to the ranks of the employed are people who would otherwise have been unemployed locally. Many jobs are for instance taken by people who move into the area specifically for that purpose.

Households - Numbers of households are projected using Chelmer's projected ratios of households to population in each year in each district multiplied by projected population numbers in each district. We have used separate ratios for migrants and for the existing population. The ratios for the existing population (excluding migrants) are from Chelmer's zero net migration scenario which assumes no net migration in future and use the DCLG/ONS 2003-based

projections for headship rates. For household ratios of migrants we have used the difference between the Chelmer zero net migration and the Chelmer trend migration projections.

Dwelling stock - Numbers of dwellings are projected as the number of households in each district multiplied by the Chelmer ratio of dwellings to households for each year in each district. This ratio is constant for each future year but differs between districts, It takes into account such things as vacant dwellings, shared dwellings, multiple occupancy and second homes. The ratios are taken from the same Chelmer model run as for households and from the trend migration scenario.

Scenarios

The model has been set up with an initial set of annual 'unrestricted baseline' forecasts for each variable at both regional and local scales. The unrestricted baseline forecasts for the UK and for the region as a whole are derived from the Oxford Economics Spring 2008 regional forecast. Forecasts for districts are constructed using the methods described in the previous section. These forecasts are referred to as the 'unrestricted baseline' as there are no supply-side constraints in place. The unrestricted baseline forecasts are Oxford Economics considered view and should be sourced accordingly, they are not official forecasts by EERA/EEDA.

It is possible to change these forecasts through constructing alternative scenarios. This can be done through changing a range of variables at each scale. The main scenario used in this report is based on housing stock levels for 2021 as projected in the current RSS (the Secretary of State's 2006 Proposed Changes to the RSS, policy H1). This imposes the RSS projected housing levels for 2021 in each district in the region. The model then calculates the level of migration for each district needed to generate a population consistent with the RSS housing targets. The model also calculates a level of employment consistent with the population and labour force in each district.

Alternative scenarios were also generated for the base and RSS cases. In these alternatives, it was assumed that the share of regional employment (or LQ) in each district would be at the optimistic end of the spectrum of possibilities for sectors where such a spectrum was most plausible. A total of 24 sectoral shares (or LQs) were changed across four of the districts. This represents 14% of all of the sectors across the whole London Arc area. The result was to raise the growth rate for the London arc area up to the average of the region as a whole, (even though no such target was adopted in making the sectoral changes).

Errors in historical data

Official employment statistics for the London Arc are affected by some large and obvious errors. OE have corrected these errors in their historical time series and based their forecast scenario on the corrected figures. Those corrections that

bear on employment land uses are listed in the table below. The corrected figures of course are only estimates, based on averaging the values either side of the error. While it is clear that the original figures are wrong, there is no way to determine the right figures precisely.

Corrections to Historical Data

District	Sector	Year	Jobs Original	Jobs Corrected
Hertsmere	Business Services - Labour Recruitment, Security & Cleaning	2001	14,542	4,500
St Albans	Business Services - Labour Recruitment, Security & Cleaning	1998	29,280	4,000
Watford	Business Services - Labour Recruitment, Security & Cleaning	2006	8,316	5980
Broxbourne	Chemicals & Process Industries and Bus.Servs - R&D, technical testing	All	Transferred 450 jobs from Chemicals to R & D	

Source: Oxford Economics

Correction to the model

In June 2006, after the present London Arc forecasts were prepared, a problem was discovered in the regional model, relating to the estimates of the working-age population, and the regional forecasts were corrected accordingly. The London Arc forecasts have not been re-run further to this correction, because its impact on the sub-region were insignificant, e.g. an increase of 0.1% in resident employment by 2021.

Caveats

As with all forecasts care must be exercised when using results as many factors can influence the factors being modelled. Forecasts produced should be seen as illustrative as used as part of an overall evidence base. The plausibility of the inputs and the need to critically assess the outputs remains crucial.

APPENDIX TWO

Previous Site Assessments

Broxbourne: assessments of existing sites, from Broxbourne Employment Land Study March 2008

Table 5.2 Sites Assessed in Waltham Cross

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
1	Station Approach/Monro Industrial Estate		3.82	Retain
2	Britannia Road		32.10	Retain
31	Medlock Electrical Distribution	0.63		Retain
32	Trust Road office block/Aro House/Wellington House	0.20		Retain
33	Station Approach/North London Sawmills		0.18	Consider for release
34	Haulage contractors site		0.23	Consider for release
35	Royal Mail depot		0.22	Retain but consider for other uses if site becomes vacant
36	Eleanor House	0.43		Retain
37	London and Lancashire Rubber Co Ltd		0.22	Consider for release
38	Durken Group Offices	0.23		Retain
39	Trust Road Industrial		0.52	Retain
40	Waltham Cross High Street 1	0.12		Retain
41	Waltham Cross High Street 2		0.36	Consider for release
42	Waltham Cross High Street 3		0.14	Consider for release

Source: LSH

Table 5.3 Sites Assessed in Cheshunt

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
3	Delamare Road	4.35	13.85	Retain but not a good site
7	Delamare Road		2.52	Retain
27	Fielding Road 2		0.57	Retain
28	Coleman Brothers		1.35	Retain but monitor
46	Delamare Road		0.13	Retain

Source: LSH

Table 5.4 Sites Assessed at Greater Brookfield

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
9	Fairways Trading Estate		2.17	Suitable for industrial use, but proposed for retail warehousing
26	Turnford Place	3.57		Retain
43	Borough Council Depot and HCC recycling centre		1.12	Suitable for industrial use, but proposed for retail warehousing

Source: LSH

Table 5.5 Sites Assessed at Churchgate

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
29	Maxwells Farm		1.26	Retain
44	Bishop's College	0.19		Retain
45	Bishop's College	0.14		Retain

Source: LSH

Table 5.6 Sites Assessed in Hoddesdon

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
6	Hertford Park		7.67	Retain
15	Ware Road		0.26	Consider for release
16	Bonjour Building		0.03	Retain
17	Mr Unique, car repairer		0.13	Retain
18	Rowdon House, Charlton Way	0.04		Retain
19/20	Legra Avenue, Lime Court	0.06		Retain
21	Brewery Road site 1		0.01	Retain
22	Brewery Road site 2	0.02		Retain
23	Brewery Road site 3		0.14	Retain
24	Scania House	0.39		Retain

Source: LSH

Table 5.7 Sites Assessed in NE Hoddesdon

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
4/5	NE Hoddesdon 1		27.00	Retain
13	Essex Road	0.87		Retain

Source: LSH

Table 5.8 Sites Assessed at Rye House

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
8	Plumpton Road		3.31	Retain
12	Bosanquet Road		0.88	Consider for release
14	Ryehouse Station Ind.	1.28		Retain

Source: LSH

Table 5.9 Other Sites Assessed in the Borough

Ref	Site name	Area(ha)		Recommendation
		Office	Industrial warehousing	
25	Bridge House	0.07		Retain, but reconsider if site stays unoccupied for too long
30	Goffs Oaks House	0.63		Retain

Source: LSH

Hertsmere Employment Sites (June 2006)

Employment area	Site	Town	Market sector	Size (ha)	Age	Internal environment	External environment	Accessibility by road	Accessibility by public transport	Local market conditions	Overall quality assessment	Suitability of buildings for purpose	ASSESSMENT	Comments
Stirling Way	Stirling Way Industrial Estate	Borehamwood	B1 , B2, B8	5.63	Mixed	average	good	good	good	good	good	Mixed	GOOD	Scope for future infill development
-	Theobald Street	Borehamwood	B1 , B2, B8	2.99	Mixed	average	good	good	good	average	good	Mixed	GOOD	Within "town centre" designation
Elstree Way	Elstree Way	Borehamwood	B1 , B2, B8	5.77	Mixed	good	good	good	good	good	good	good	GOOD	None
-	Eldon Avenue (Nat West offices)	Borehamwood	B1 (a)	6.36	1980s	average	good	good	good	average	good	good	GOOD	Within "town centre" designation
-	Council Civic Offices	Borehamwood	B1 (a)	0.82	1980s	good	good	good	good	average	good	good	GOOD	Within "town centre" designation
-	Elstree Film & TV Studios	Borehamwood	B1	5.85	1970s	poor	good	good	good	average	good	average	GOOD	Within "town centre" designation
-	Imperial Place Offices	Borehamwood	B1 (a)	1.89	1980s	good	good	good	good	average	good	good	GOOD	Within "town centre" designation
-	Maxwell Road	Borehamwood	B1 (a)	1.09	1960s	average	average	good	good	average	good	average	GOOD	To rear of Imperial Place
-	Station Rd	Borehamwood	B1	1.32		average	average	average	good	average	average	good	GOOD	
-	Costco, Hartspring Lane	Bushey	B8	5.55	1990s	good	good	good	average	good	good	good	GOOD	Limited scope for further development - poor local infrastructure a problem
-	Three Valleys Way North	Bushey	B1 , B2, B8	3.26	Mixed	average	good	good	standar	average	good	average	GOOD	LP Housing Allocation
-	Works, Clay Lane	Bushey	B1	1.88		good	good	average	average	average	good	average	GOOD	
Otterspool Way	Otterspool Way	Bushey	B1 , B2, B8	10.48	Mixed	average	good	average	average	good	good	good	GOOD	Potential in-fill development
-	London Road	Bushey	B1	0.41	Mixed	good	good	good	good	good	good	good	GOOD	outline permission for residential
-	High Road	Bushey	B1	0.28	Mixed	good	good	good	good	good	good	average	GOOD	
-	Church Lane, Park Corner	Colney Heath	B1	3.930	Mixed	average	average	average	poor	poor	average	good	GOOD	Green Belt - poor local infrastructure
Centennial Park	Centennial Park off A41	Elstree	B1 , B2, B8	10.68	1990s	very good	very good	good	average	good	good	very good	GOOD	Planned business park - further phases expected.
-	Lisminnane Industrial Park, Elstree Road	Elstree	B1 , B2, B8	1.94	1980s	good	good	good	average	good	good	good	GOOD	Surrounded by Green Belt
-	Bio Products Lab, Dagger Lane	Elstree	B1	10.16	1960s	good	good	good	poor	average	average	good	GOOD	Current use suited to location
-	Bell Lane, adj Arsenal FC Training Ground	Other	B1, B8	0.65	1970s	average	average	good	poor	good	average	good	GOOD	Small depot area. Planning permission has been granted for Arsenal to build an indoor training pitch on the industrial estate area.
-	Watling Street, Colney Street	Other	B1 (a/c)	0.80	2000s	good	good	good	average	good	good	good	GOOD	Green Belt, approx half in St. Albans
-	Mutton Lane / Southgate Rd	Potters Bar	B1 (a)	0.83	1980s	good	good	good	very good	average	good	good	GOOD	Popular estate despite local infrastructure
-	Hollies Way Industrial Works, High Street	Potters Bar	B1 , B2, B8	0.52	Mixed	average	good	good	good	average	good	Mixed	GOOD	Nr bus depot, bad neighbour uses
-	Bus Depot, High Street	Potters Bar	B2, B8	1.09	Mixed	average	good	good	good	average	good	Mixed	GOOD	
-	Darkes Lane	Potters Bar	B1 (a)	0.48	1980s	good	good	good	good	average	good	good	GOOD	Within "town centre" designation (Metropolitan House)
-	Mutton Lane	Potters Bar	Sui Generis	0.83	1970s	good	good	good	good	average	average	good	GOOD	Potential for residential in surrounding use
-	Wrotham Park	Potters Bar	B1 (a)	1.66	Mixed	good	good	good	average	good	good	good	GOOD	
-	Ridgehill Stud, Rectory Lane	Shenley	B1	0.56	Mixed	good	good	poor	poor	good	average	good	GOOD	Green Belt
-	Bignells Corner, M25	South Mimms	B8	11.64	1960s	average	good	good	poor	average	good	Mixed	GOOD	Green Belt & Policy M14
-	Southridge Animal Centre, Packhorse Lane	South Mimms	B1	1.81	Mixed	good	good	good	poor	average	good	good	GOOD	Green Belt
-	Farm Close	Shenleybury	B1 (a)	0.41	1960s	good	good	good	poor	good	good	good	GOOD	Refurbished farm buildings for school and offices
-	Shenley Road	Borehamwood	B8	0.65	1960s	average	average	average	good	poor	average	average	AVERAGE	Post office and telephone exchange
-	Station Road	Borehamwood	B1 , B2, B8	1.92	Mixed	average	average	average	good	Mixed	average	Mixed	AVERAGE	Has pp for housing
-	Allum Lane	Borehamwood	B1 , B2, B8	0.10	Mixed	average	average	poor	good	Mixed	average	poor	AVERAGE	Has pp for housing
-	BBC Clarendon Rd	Borehamwood	B1	6.36	1960s	average	average	average	average	average	average	average	AVERAGE	Within "town centre" designation
-	Greatham Road	Bushey	B1	1.64	Mixed	poor	poor	average	good	average	average	poor	AVERAGE	
-	Walton Road	Bushey	B1 , B2, B8	1.17	Mixed	poor	poor	average	good	average	average	poor	AVERAGE	
-	Bournehall Road, Park Rd, Rudolph Rd	Bushey	B1	0.40	Mixed	average	average	good	good	average	average	average	AVERAGE	Cons Area / District Centre
-	Elton Way	Bushey	B2, B8	0.27	Mixed	average	good	good	average	average	average	average	AVERAGE	Green Belt
-	Park Avenue	Bushey	B1 , B2, B8	0.31	1990s	average	average	poor	average	average	average	average	AVERAGE	
-	Off Aldenham Rd	Bushey	B1	0.41	Mixed	average	average	good	good	average	average	average	AVERAGE	
-	Medburn Farm	Other	B8	0.19	Mixed	average	average	good	poor	average	average	average	AVERAGE	Green Belt
Cranborne Road	Cranborne Rd Industrial Estate	Potters Bar	B1 , B2, B8	12.48	Mixed	average	average	average	average	good	average	Mixed	AVERAGE	Established industrial area with poor local infrastructure
-	Hatfield Road	Potters Bar	B1	0.70	pre 1960	average	good	good	good	average	average	average	AVERAGE	Telephone exchange
-	Orchard Parade, Mutton Lane	Potters Bar	B1, B8	0.49	1960s	poor	average	good	good	poor	average	average	AVERAGE	Potential for redevelopment
-	Battlers Green Farm	Radlett	B1 , B2, B8	1.45	Mixed	average	good	poor	poor	average	average	Mixed	AVERAGE	Green Belt
-	Watling Street	Radlett	B1, B8	0.67	Mixed	average	average	good	good	average	average	poor	AVERAGE	Residential consent refused on appeal and new application submitted
-	Roundbush Garage	Roundbush	B1, B2	0.17	Mixed	average	average	average	poor	average	average	Mixed	AVERAGE	pp for housing subject to S106
-	Cage Pond Garage, Pound Lane	Shenley	B1, B2	Small	1960s	average	poor	poor	poor	average	average	poor	AVERAGE	Green Belt & Conservation Area
-	Harrington Garage, London Rd	Shenley	B1, B2	Small	1970s	average	average	average	poor	average	average	average	AVERAGE	
-	Coursers Road	Tytenhanger	B1	Small	Mixed	average	average	average	poor	poor	average	average	AVERAGE	
-	Oakridge Lane	Aldenham	Sui Generis	15.29	Mixed	average	average	poor	poor	poor	poor	good	POOR	
-	Dancers Hill Road, Bentley Heath	Bentley Heath	B1 , B2, B8	0.72	Mixed	average	average	average	poor	average	poor	Mixed	POOR	Green Belt
-	Glenhaven Avenue	Borehamwood	B1 , B2, B8	0.52	1960s	poor	poor	average	good	average	poor	Mixed	POOR	
Station Close	Station Close	Potters Bar	B1 , B2, B8	1.17	Mixed	congested	average	good	good	average	poor	average	POOR	
-	Moses Dell, Watling St	Radlett	Sui generis	0.80	Mixed	average	poor	poor	poor	poor	poor	poor	POOR	Green Belt
-	NIBSC Site North, Blanche Lane	South Mimms	B1	11.48	Mixed	average	average	poor	poor	poor	poor	average	POOR	Green Belt
-	Clare Hall (Cancer Research UK)	South Mimms	B1	0.86	1990s	average	average	poor	poor	poor	poor	good	POOR	Green Belt - limited expansion
-	Blanche Farm, Blanche Lane	South Mimms	B1	0.29	pre 1960s	average	average	poor	poor	poor	poor	average	POOR	
-	Sewage Works Off Dagger Lane	Other	Sui generis	0.22	n/a	average	average	good	poor	average	average	poor	AVERAGE	Green Belt
-	Land adjacent to railway line	Bushey	Mixed	0.78	Mixed	average	average	good	good	average	average	average	AVERAGE	

Hertsmere Development Sites (June 2006)														
Employment area	Site	Town	Market Sector	Gross Development Area (ha)	Planning Status	Internal Environment	External Environment	Road Access	Access to Public Transport	Local Market Conditions	Overall Quality of Site	Available/Constrained	ASSESSMENT	Comments
Stirling Way	Stirling Way	Borehamwood	B1, B2, B8	0.12	Permission	average	good	good	good	good	good	Available	GOOD	Infill or redevelopment - some old units
Centennial Park	Centennial Park	Elstree	B1,B2,B8	4.50	Permission	very good	very good	good	average	good	good	Available	GOOD	Two thirds built out - emphasis on hi-tech and office. A
-	Land at Clare Hall (Cancer Research UK)	South Mimms	B1	1.66	Permission	average	average	poor	poor	poor	poor	Constrained	POOR	PP for extension - need to clarify status
Otterspool Way	Otterspool Way	Bushey	B1, B2, B8	0.17	Permission	average	good	good	average	good	good	Available	GOOD	Getting redeveloped, inc recent car showrooms
Cranborne Road	Cranborne Industrial Estate	Potters Bar	B1, B2, B8	0.28	Permission	average	average	average	average	good	average	Available	AVERAGE	Small Unit scheme built by Devonshire Developments
Elstree Way	Elstree Way	Borehamwood	B1, B2, B8	4.30	Permission	good	good	good	good	good	good	Constrained	AVERAGE	Consents for infill / redevelopment
-	Barn at Tyttenhanger Farm, Coursers Rd	St. Albans	B1	0.12	Permission	poor	average	poor	poor	average	poor	Available	POOR	Green Belt location
-	Highways Maintenance Depot, St. Albans Rd	Potters Bar	B1, B2, B8	0.18	Permission	average	average	good	good	good	good	Available	GOOD	Green Belt off M25
-	Land at Charlton Paddocks	South Mimms	B1, B8	0.94	Permission	average	average	poor	poor	average	poor	Constrained	POOR	Green Belt
-	Shenleybury Farm Buildings	Shenleybury	B1	0.09	Permission	average	average	poor	poor	average	poor	Constrained	POOR	Green Belt

3 Rivers

Site Name / Location	Town	Current/Previous Use	Site Area ha	Strategic Access	Local Access	General location	External environment/ neighbouring uses	Internal environment	Viability for empty devt/redvlt	Total score	Rating	Verdict	Any comments
Croxley Business Park	Watford	B1	15.7	2.0	2.0	4.0	1.0	1.0	2.0	2.0	Good	Retain for employment	High quality modern business park south west of Watford, on the edge of the urban area. Low density, well landscaped, poor public
Tolpits Lane	Watford	B1/B2/B8	23	2.0	3.0	4.0	2.0	2.0	3.0	2.7	Average	Retain for employment	Mixed employment area, combination of out of town office park e.g Wolsey Business Park, Metro Centre, and industrial/warehousing on Moor Park and Vale Industrial Estate. Evidence of recycling - modern small unit development such as Century court. Generally high density employment area. Access not as good as other employment areas but is on the edge of watford, M25 within 30 mins and no conflict with neighbouring uses. Contains some of the areas largest sheds, but these are being subdivided into smaller units.
Maple Cross	Maple Cross	B1	7.25	1.0	2.0	4.0	2.0	1.0	3.0	2.2	Good	Retain for employment	Excellent strategic and local access, just off the J17 of the M25. HQ office location (Cadbury Schweppes, Nissan, Skanska), with critical mass. Suitable for such occupiers due to motorway access and national/international accessibility. Large area of undeveloped land adjacent to employment area, and a brownfield development site within it.
Junction Park	Hunton Bridge	B1/B8	2.6	1.0	2.0	4.0	3.0	2.0	3.0	2.5	Average	employment/mixed use	well located on A41 and just off J20 of M25. Some potential for conflict with housing opposite and the local roads are narrow, but there are only a few houses nearby. The site is in an attractive conservation area adjacent to the canal which will impose costs on development design. No critical mass here (like at Maple Cross) and relatively peripheral office location. Possible mixed use, with small business units but would have to be suitable for conservation
Kings Langley North	Kings Langley	B2/B8	9.85	2.0	3.0	3.0	3.0	2.0	2.0	2.5	Average	Retain for employment	High density industrial estates, occupied by small units and HGV maintenance garage. Local access via unclassified roads. Limited potential for conflict with neighbours as sites relatively self contained. High level of occupancy.
Kings Langley South	Kings Langley	B2/B8	3.9	1.0	1.0	3.0	2.0	1.0	2.0	1.7	Good	Retain for employment	mixture of office and industrial uses. Site south of Home Park is vacant (former AstraZeneca office/warehouse), north of home park occupied by Imagination Technologies and Frontier Silicon. Good strategic and local access (M25/M41) and good public transport, being adjacent to Kings Langley station. suitable for a full range of employment uses, but on the edge of open greenbelt so design will
Leavesden Park	Leavesden	B1	32	1.0	1.0	4.0	1.0	1.0	3.0	1.8	Good	Retain for employment	Key employment site in the Structure Plan with long term potential for business park development.
Carpenders Park	South Oxhey	B1	1	3.0	4.0	3.0	3.0	3.0	2.0	3.0	Poor	Mixed use	Access to this area is constrained and can only be reached via a residential estate. The area accommodates a number of office or light industrial buildings, together with some vacant/disused land (c.25% of the area). Seems somewhat out of place but is the only employment area in this part of the district. The buildings are well occupied, with only a few small suites available. Intensification of employment use on the site would cause conflict with surrounding area.
Rickmansworth Town Centre	Rickmansworth Town Centre	b1	2	2.0	2.0	1.0	2.0	2.0	2.0	1.8	Good		there are 47,000 sq m of office floorspace in Rickmansworth town centre, 26% of the District's total. Much of the space is contained in three buildings; Drake House, Comet House and the Three Rivers DC offices, the remainder is mainly smaller units in the High Street area or above shops. Rickmansworth town centre office market appears healthy, 6.4% vacancy. Town centre is attractive and sustainable location suitable particularly for professional services such as lawyers, accountants etc. Offices should only be released where they are no longer suitable for employment and development/redevelopment for such uses would be unviable.

Watford

Site Name / Location	Town	Current/Previous Use	Site Area ha	Strategic Access	Local Access	General location	External environment/ neighbouring uses	Internal environment	Viability for empl devlpt/redvpt	Total score	Rating	Recommendation	Any comments
Watford Business Park	West Watford	Mixed industrial with some office	32.63	3.0	3.0	3.0	1.0	2.0	2.0	2.3	Average	Retain for employment	A popular employment area with a high level of occupancy. Reasonable highway access although some distance from the motorway network. Some distance from housing so little potential for conflict and suitable for full range of employment uses. Mainly medium sized units, some quite old and in need of regeneration. Evidence of recycling: e.g. Caxton Court: industrial/warehouse scheme, Watford enterprise centre is also relatively modern. land on Greenhil Crescent/Caxton Way corner marketed for redevelopment
Cardiff Road	West Watford	Small workshop/light industrial	9.46	3.0	5.0	3.0	5.0	3.0	3.0	3.7	Poor	Infrastructure improvements needed for future employment use	Currently a poor quality employment site constrained by poor access, layout and conflict with residential uses. Redevelopment for employment uses only feasible if local problems are tackled. If done, the area would be suitable for small to medium sized light industrial uses. too far from the motorway to be a good distribution location, although would suit smaller warehouses catering for local/specialist markets/trade etc
Imperial Way/Colonial Way	Imperial Way	B1/B2/B8	24.8	1.0	2.0	2.0	2.0	2.0	2.0	1.8	Good	Retain for employment	Mixed employment area, principally industrial and warehousing with some campus style modern office development e.g The Belfry n Colonial Way. Good quality employment area with direct access onto the A1008 and motorway. Some conflict with housing but area has sufficient critical mass for noisy uses to be absorbed into the site. Evidence of recycling, including the Imperial Park development and the Belfry
Fishers Industrial Area	West Watford	B1/B2/B8	2.3	3.0	3.0	3.0	2.0	3.0	2.0	2.7	Average	Retain for employment	Some distance from the trunk road network but has direct access onto Wigenhall Road. Bounded by the railway and road network so no potential to expand, but no conflict with neighbouring uses. Current site layout is efficient, therefore little potential to increase density
St Albans Road	Central Watford	mixed use, retail to west of railway, industrial to east	10.4	2.0	1.0	1.0	1.0	1.0	1.0	1.2	Good	Mixed use	Principally retail uses on this site, with industrial land to the east of the railway line, currently accessed off Imperial Way. Railway forms natural barrier between industry and residential areas. Forms part of the RA6 regeneration site and will be opened up by new road access
Odhams	N Watford	B2	11.5	2.0	3.0	3.0	3.0	3.0	3.0	2.8	Average	Retain for employment	Part of this area has been redeveloped as an Asda supermarket, the remainder is occupied by a warehouse occupier, Amertrans. Access via resi streets with housing on the boundaries therefore potential for conflict, although the site has critical mass when combined with the Greycaine estate. also is close to A41
Greycaine	N Watford	B1/B2/B8	12.5	2.0	3.0	3.0	3.0	2.0	2.0	2.5	Average	Retain for employment	High density industrial/warehouse location of predominantly older buildings (c.1950's). Rather congested internally and there is little potential to intensify development. Access is via narrow residential streets, so not ideal and there is potential for conflict but the A41 is nearby.
Sandown	N Watford	Small workshop/light industrial	3.5	2.0	4.0	3.0	4.0	4.0	4.0	3.5	Poor	Mixed use	Mixture of modern warehouses on Bushey Mill Lane and old factory buildings that have been reused as workshops. Access is very restricted on Sandown Road, which is a narrow residential street and there is a high potential for conflict with adjacent housing. The estate provides useful small scale workshop accommodation but redevelopment would be a problem - it is currently very high density, which would be difficult to replicate in a new scheme.
Clarendon Rd/Station	Central Watford	Offices	8.9	2.0	1.0	1.0	1.0	3.0	2.0	1.7	Good	Retain for employment	Key office location with excellent communications, close to the train station and town centre. Current high level of vacancy. Regeneration proposals for the Station may include some office development, but led by need to improve rail/passenger facilities rather than land use policy.
Sun Chemicals A41	N Watford	B1/B2/B8	6.3	1.0	4.0	3.0	3.0	3.0	4.0	3.0	Average	mixed use	Site has good access, being just off the A41 and is adjacent to a waste management site and a Sainsbury supermarket. Conflict with resi will be limited but the capacity of the road junction may hamper employment development. The site is likely to be contaminated due to its previous use by Sun Chemicals, which could affect the viability of its redevelopment. A mixed use approach may need to be considered to facilitate redevelopment. May be an opportunity to accommodate 'dirty uses'.
Upton Road	Central Watford	Offices	1.5	2.0	2.0	1.0	2.0	3.0	2.0	2.0	Good	Retain for employment	Employment area on the south western boundary of the town centre, suitable for office uses. Contains a mix of office and residential uses, and there is a large development site, The Glasshouse. Should capitalise on connections with the town centre to make it a more attractive work environment.

Dacorum

Site Name / Location	Town	Current/Previous Use	Site Area ha	Strategic Access	Local Access	General location	External environment/ neighbouring uses	Internal environment	Vacancy	Total score	Rating	Recommendation	Any comments
Billet Lane	Berkhamstead	Secondary Industrial	1.43	3.0	1.0	2.0	1.0	2.0	1.0	1.7	Good	Retain for employment	currently in use as a timber yard. This site has good road access and prominence onto the High Street. It is separate from the Northbridge road estate by the canal and river Bulbourne runs through the site, constraining development of larger units. May be at risk of loss to housing owing to canal side and riverside location. Suitable for small and medium units like River Park
Northbridge Road	Berkhamstead	Secondary Industrial	6.7	3.0	1.0	2.0	1.0	2.0	2.0	1.8	Good	Retain for employment	Best employment area in Berkhamsted, mixed linear industrial estate sandwiched between the canal and the railway line. Local access is reasonable and low potential for disturbance arising from employment uses, suitable for full range of uses in small/medium sized units.
River Park	Berkhamstead	Secondary Industrial	1.1	3.0	2.0	2.0	1.0	2.0	1.0	1.8	Good	Retain for employment	good local access. Site rather narrow so only suitable for small units. Modern development fully occupied,
Breakspear Park	Hemel Hempstead	Office/B1	7.8	1.0	1.0	4.0	1.0	1.0	1.0	1.5	Good	Retain for employment	Modern HQ office campus. Excellent strategic and local access, although currently car dependent. Limited conflict with neighbouring uses, although there is a housing proposal on western boundary. Suitable for B1 uses, although a reduced market for single occupation. currently being refurbished and part let to management consultants and BP.
Buncefield	Hemel Hempstead	Industrial	26.05	1.0	1.0	4.0	1.0	3.0	2.0	2.0	Good	Retain for employment	Currently an oil depot but suitable for a full range of employment uses. Being on periphery of the urban area makes it most suited to distribution/noisy uses. Likely to be contaminated, therefore pressure for development will be driven by higher value employment uses.
Maylands	Hemel Hempstead	Mixed Prime Ind & Office	59.1	1.0	2.0	4.0	1.0	2.0	3.0	2.2	Good	Retain for employment	Currently a mixed employment area comprising office campuses, B8 units and industrial uses. Uses coexist and access is good, less congested than Maylands Avenue but may be due to vacancy of large sites e.g part 3Com office, Marchmont Gate and Dexion site. peripheral offices are less attractive due to the proximity of industrial uses.
Maylands Avenue	Hemel Hempstead	Office/B1	26.85	1.0	2.0	4.0	1.0	2.0	3.0	2.2	Good	Retain for employment	Office avenue with mixture of ages. Road congested despite vacancies of former Epson unit and Peoplebuilding. Further intensification of uses may cause stress to the area without investment in infrastructure and public transport. Lack of supporting uses (e.g. food and drink, retail)
Swallowdale	Hemel Hempstead	Industrial	40.55	1.0	2.0	4.0	1.0	2.0	2.0	2.0	Good	Retain for employment	Rear of the main Hemel employment area, that is mainly industrial in character. Local access more restricted due to local congestion on wider estate. Part new B8, part older B2/B8. Suited to smaller B1/B2 uses.
Three Cherry Trees Lane	Hemel Hempstead	Office/B1	27	1.0	5.0	4.0	3.0	2.0	2.5	Average	Retain for employment but consider broader mix	Designated for specific high tech/science park uses. Access currently poor: Three Cherry Trees Lane single track in parts, development will need significant highway improvements. Query demand for the type and quantum of floorspace proposed. Also, position is not ideal for high quality office/high tech science park floorspace as it lacks prominence and must be approached via a predominantly industrial estate. This is a shed location rather than a science park location.	
Paradise	Hemel Hempstead	Office/B1	3.8	2.0	3.0	1.0	3.0	3.0	2.0	2.3	Average	Retain for employment	Local access poorer than other areas but well related to the town centre. Good location for town centre, smaller offices and light industrial/workshop uses. Low level of vacancy in the area
Apsley Mills	Hemel Hempstead	Office/B1	3.3	3.0	3.0	3.0	3.0	2.0	4.0	3.0	Poor	Retain in B1/mixed use	Suitable for smaller offices or light industrial uses. The character of the surrounding area has changed substantially, and is now dominated by retail and new housing development, local highways congested and wrong side of town for B8 uses therefore B2/B8 not suitable here.
Comer Hall	Hemel Hempstead	Office/B1	2.6	2.0	2.0	1.0	1.0	3.0	2.0	1.8	Good	Retain in employment use	This is a mixed use area, incorporating offices, retail and motor trade uses. Its location close to the town centre makes it suitable for B1 uses and such uses would relate well with the adjoining residential area.
Doolittle Meadow	Hemel Hempstead	Office/B1	6.2	2.0	3.0	4.0	3.0	3.0	5.0	3.3	Poor	Mixed use	this site is currently occupied by a substantial 1980's HQ office development, much of which has lain vacant for some time, and there is an oversupply of such space in the market presently. The local environment means that this area is only suitable for B1 employment uses, being adjacent to existing residential development, the canal and within a landscape development area. The has reasonable public transport links, being close to Apsley Train station, but is otherwise peripheral and the local highway congestion may be a constraint on development.
Frogmore	Hemel Hempstead	Industrial	4.1	3.0	4.0	2.0	3.0	4.0	3.0	3.2	Poor	Employment/ mixed use	The Frogmore industrial estate provides reasonable quality small to medium sized units, but the area as a whole is constrained by restricted access through Apsley town centre. The historic Frogmore Mill has been earmarked to form part of the Paper Trail heritage proposal for the area, funded by the Borough council and EEDA.
Nash Mills	Hemel Hempstead	Industrial	5	3.0	4.0	4.0	2.0	4.0	1.0	3.0	Poor	Retain in employment but consider for mixed uses in the long term.	This site is occupied by the paper manufacturer Sappi and is likely to remain so for the foreseeable future. However, should it become vacant, there is unlikely to be sufficient demand for the whole site to be reused for employment uses. Costs are likely to be high (contamination, sensitive environment etc), meaning a mixed use approach, incorporating employment uses would be appropriate. High level of occupancy
Apsley Industrial Estate	Hemel Hempstead	Industrial	0.63	2.0	3.0	2.0	3.0	2.0	1.0	2.2	Good	retain in employment uses	Discreet estate of small industrial units accessed off London Road. Alongside railway line, some housing nearby but limited potential for conflict. High level of occupancy.
Two Waters	Hemel Hempstead	Industrial	8.6	1.0	2.0	2.0	2.0	3.0	2.0	2.0	Good	Retain for employment	This area is suitable for the full range of employment uses. It has good strategic access to the A41 and has good commercial prominence. There is also limited potential for conflict with neighbouring uses as it is surrounded largely by roads and the railway line.

Dacorum

Site Name / Location	Town	Current/Previous Use	Site Area ha	Strategic Access	Local Access	General location	External environment/ neighbouring uses	Internal environment	Vacancy	Total score	Rating	Recommendation	Any comments
Ickneild Way	Tring	Secondary Industrial	6.2	1.0	2.0	4.0	1.0	2.0	2.0	2.0	Good	Retain for employment	Best employment area in Tring. Good access, improved by the Aston Clinton bypass. Some ripe development land within the estate which should be protected for industrial development
Akeman Street	Tring	Secondary Industrial	0.8	3.0	4.0	2.0	3.0	4.0	1.0	2.8	Average	retain in employment uses/ long term review	Access restricted via narrow, town centre streets, surrounded by housing and the site area/shape is constrained. Currently fully occupied and provides a useful source of small unit space in Tring.
Brook Street	Tring	Secondary Industrial	0.8	3.0	3.0	3.0	3.0	4.0	1.0	2.8	Average	retain in employment uses/ long term review	Local access is restricted with poor sightlines due to the built form of the estate. Small units within old factory buildings, high density site useage and redevelopment could result in lower density use. Housing along western and southern boundary therefore some potential for conflict. Listed building imposes cost and usage constraints. currently high level of occupancy so should remain as an employment site but longterm use as employment site needs to be kept under review.
Markyate Industrial Area: Markyate		Secondary Industrial	2.8	1.0	2.0	2.0	3.0	3.0	2.0	2.2	Good	Retain for employment	good strategic and local access to M1 via A5. High density estate with housing/town centre uses on three sides. Some potential for conflict, although less if access is restricted to via A5. The only employment site in this part of the district.
Bourne End Mills	Greenbelt	Secondary Industrial	3.4	1.0	1.0	5.0	2.0	3.0	2.0	2.3	Average	Retain for employment uses	situated between Berkhamsted and Hemel just off the A41. The site has good strategic and local access directly off the A41. On the edge of the village of Bourne End so limited potential for conflict
Bovingdon Brickworks	Greenbelt	Secondary Industrial	2.9	4.0	3.0	5.0	1.0	3.0	1.0	2.8	Poor	Retain for employment uses	existing use as brickworks/builders merchants occupied by EH Smith Building Materials. Established use in rural area
Kodak Building	Hemel Hempstead: Office/B1		-	3.0	2.0	1.0	2.0	5.0	5.0	3.0	Poor	Mixed use	c150,000 sq ft of office space on the edge of Hemel Town Centre. Good location close to the town centre and on the right side of town for the train station but would question whether there is demand for this much floorspace in central Hemel. Redevelopment
Town Centre	Hemel Hempstead: town centre: retail/resi/employment		-									Maintain balance of employment and other uses	there is approximately 101,000 sq m of employment floorspace in the town centre, 81,000 sq m of which is office floorspace. The main office areas are the Kodak tower on the edge of the town centre, The Marlowes central area, which includes the District Council offices, and parts of the Paradise estate. Apart from Kodak and the public sector offices, the main offer in the town centre is small/medium sized units. Ideally suited to professional services e.g. lawyers, surveyors, financial advisors, accountants etc. Less demand for large office/single occupiers

St Albans Development Sites (June 2006)

Employment area	Site	Town	Market Sector	Gross Development Area (ha)	Planning Status	Internal Environment	External Environment	Road Access	Access to Public Transport	Local Market Conditions	Overall Quality of Site	Available/Constrained	ASSESSMENT	Comments
Policy 23	B1.1	High Street (North)	Harpenden	B1/B2 Mix	0.34	Planning permission	average	good	good	average	average	Available	AVERAGE	Likely to be developed for housing.
Policy 20	EMP7	North of Buncefield	Hemel Hempstead	Industrial	9.17	Allocated	Good	average	Good	Poor	Good	Constrained	AVERAGE	Western part greenfield, eastern part includes 2 warehouse buildings which were damaged in the recent fire. Continued use for warehousing awaiting outcome of Buncefield Inquiry and follow-on masterplanning to be undertaken by Dacorum.
Policy 26	-	Spencers Park (North East Hemel Hempstead)	Hemel Hempstead	R&D	7.78	Allocated	Good	Good	Good	Poor	Good	Constrained	AVERAGE	Most of this site is in Dacorum. Part is also affected by the Buncefield Inquiry. May be developed for housing or employment, or a mix.

Welwyn Hatfield Employment Sites (June 2006)

Employment area	Site	Town	Market Sector	Size	Age	Internal environment	environment	Accessibility By Road	Public Transport	Local Market conditions	quality of site	buildings for purpose	ASSESSMENT	Comments
EA1 WGC Industrial Area	Shire Park	Welwyn Garden City	B1 A	22.93	1980s	good	good	average	good	poor	good	very good	GOOD	Retain for expansion of existing uses
	Mundells		B1A & C/B2/B8	11.95	1970	average	average	average	good	average	average	good	GOOD	Large scale Class B use development opportunity on parts
	Tewin Road		B1 A & C/B2/B8	13.53	1950s	mixed	average	average	good	average	mixed	poor in parts	AVERAGE	Potential for piecemeal redevelopment (for Class B uses) of parts
	Broadwater Road West		B1 A & C/B2/B8	14.99	1970s	poor	average	average	good	average	average	mixed	AVERAGE	Identified in the District Plan as an opportunity sites for primarily employment, leisure, residential and rail-related uses and will be the subject of a development
	Broadwater Road		B1 A & C/B2/B8	4.38	1970s	mixed	average	average	good	average	average	variable	AVERAGE	Short to medium term redevelopment (for Class B uses) possibilities of parts
	Ridgeway		B1 A & C/B2/B8	1.44	1970s	average	average	average	good	average	average	good	GOOD	Retain
	Watchmead		B1 A & C/B2/B8	21.93	1980s	good	average	average	good	average	average	good	GOOD	Retain for current mix of uses
	Swallowfield		B1 A & C/B2/B8	6.35	1970s	average	average	average	good	average	average	good	GOOD	Retain for current mix of uses
	Hydeway		B1C/ B2/B8	2.09	1960s	poor	poor	poor (local in	good	average	poor	good	POOR	Retain for current mix of uses
	Bessemer Road		B1A/ B8	18.03	1970s	mixed	average	average	good	average	average	good	GOOD	Medium term possibility for redevelopment (for Class B Uses) on parts
EA2 Burrowfield	Burrowfield	Welwyn Garden City	B1C/B2/B8	3.17	1960s	poor	poor	poor (local in	good	average	poor	good	POOR	Retain for current mix of uses
EA3 Great North Rd	Great North Rd	Hatfield	B1C/B2/B8	5.09	1960s	poor	poor	poor (local in	good	average	poor	variable	POOR	Buildings likely to become increasingly redundant
EA4 Beaconsfield Rd	Beaconsfield Rd	Hatfield	B1A & C/B2/B8	2.97	1970s	average	average	average	good	average	average	good	GOOD	Encourage further B1A subject to market conditions
EA5 Fiddlebridge Lane	Fiddlebridge Lane	Hatfield	B1A & C	1.38	1970s	average	average	poor (local in	good	average	average	variable	AVERAGE	infrastructure
EA6 Hatfield Business Park	Hatfield Business Park	Hatfield	B1A & C	68.13	2000s	good	good	good	good	good	good	good	GOOD	Existing land for redevelopment but likely to be taken up by current interest
EA7 Bishops Square	Bishops Square	Hatfield	B1A	6.39	1980s	good	good	good	good	average	good	good	GOOD	Retain for current use
EA8 Travellers Lane	North End (accessed from Southway)	Welham Green	B1A/B8	19.61	1970s	good	good	good	good	good	good	good	GOOD	Retain
	South End (accessed from Dixons Hill Rd)		B1C/B2/B8	7.63	1960s	poor	average	good	good	average	average	variable	AVERAGE	Poor internal infrastructure . Potential small scale redevelopment (for B Class uses).
EA9 Sopers Rd	Sopers Rd	Cuffley	B1C/B2/B8	3.94	1970s	average	average	average	good	average	average	variable	AVERAGE	Retain for current uses
Unallocated	Welwyn Garden City Town Centre	Welwyn Garden City	B1A	3.5	1980s	average	good	average	good	poor	good	good	GOOD	Potential long term redevelopment (for B Class uses) of parts
HS6	Evans Halshaw, London Road/Welwyn Bypass	Welwyn By Pass Road	B1C	0.29	1970s	average	average	good	average	average	average	good	GOOD	Allocated in District Plan for housing.
Unallocated	London Rd	Woolmer Green	B1/B2/B8	2.87	1960s	good	good	good	good	good	good	good	GOOD	Assessment relates to the ribbon development along the main road, rather than the Mardlebury Farm development which is too small to assess
HS4 & HS4B	Fmr Wellfield Works & Adjacent to Factory site, Wellfield Road	Hatfield	B1C	0.1	1970s	average	average	average	good	average	average	poor	AVERAGE	Allocated in the District Plan for housing.
Unallocated	The Frythe, Digswell Hill	Welwyn	B1B	12.14	1980s	good	good	good	average	average	good	good	GOOD	Site in the Green Belt, which will restrict future expansion.

Welwyn Hatfield Development Sites (June 2006)														
Employment area	Site	Town	Market sector	Gross Development Area (ha)	Planning Status	Internal Environment	External Environment	Road Access	Public Transport	Local Market Conditions	Overall quality of site	Available/Constrained	ASSESSMENT	Comments
EA1 WGC Industrial Area - Broadwater Rd	41-47 Broadwater Road	Welwyn Garden City	B1 A	0.78	Permission	average	average	average	good	average	average	available	ASSESSMENT	Suited to environment
EA1 WGC Industrial Area	41 Brownfields	Welwyn Garden City	B1C/B2/B8	0.32	Permission	poor	average	average	good	average	average	available	AVERAGE	Location and infrastructure more suited to B1C/B2
EA1 WGC Industrial Area - Mundells	The Garden Shed	Welwyn Garden City	B1/B2/B8	1.9	Permission	good	good	good	good	good	good	available	GOOD	Being marketed for distribution.
EA2 Burrowfield	Land at Chequersfield	Welwyn Garden City	B1C/B2/B8	4.7	Permission	average	average	average	good	good	average	constrained	AVERAGE	Encourage as extension to existing Burrowfields' industrial
EA2 Burrowfield	6 Little Burrow	Welwyn Garden City	B1 C	2.3	Permission	poor	poor	poor	good	average	poor	available	POOR	Local infrastructure suitable for small scale infill development only
Hatfield Business Park	Land Adjacent to Comet way	Hatfield	B1A	8.06	Permission	good	good	good	good	average	good	available	GOOD	Suitable location for proposed development
Hatfield Business Park	The IO Centre	Hatfield	B1C/B2/B8	4.01	Permission	good	good	good	good	good	good	available	GOOD	Site fully developed - consists of Land adj. to Comet Way, 8.06ha (permission for B1) and The IO Centre, Plot 5100, 4.01ha (permission for B1, B2 & B8)
Hatfield Business Park	Remaining land	Hatfield	B1C/B2/B8	17.4	Allocation	good	good	good	good	good	good	available	GOOD	Pharmaceutical company Eisai have taken 3.9ha. In addition, 12.4ha is likely to be developed for a new hospital.
Unallocated	46 The Common	Hatfield	mixed	2.55	Permission	average	average	average	good	average	average	available	AVERAGE	Permission for demolition of cinema , erection of A1, A2 and B1 office units.
Unallocated	Lemsford Mill	Lemsford Village	B1A	0.95	Permission	average	average	average	poor	average	average	available	AVERAGE	Permission for change of use from housing to offices.
Unallocated	The Melon Ground	Hatfield Park	B1A	0.24	Permission	average	average	average	poor	average	good	available	GOOD	Reconstruction of outbuildings to form offices.

APPENDIX THREE

Commitments Data

District	Address1	Address2	Town	Gain Use Class	Outstanding Gain	Loss Use Class	Outstanding Loss	Status at 31 March 2007
Three Rivers	Maple Cross House	Denham Way	Maple Cross			B1	0	Development in progress
Three Rivers	The Lodge	Cophorne Road	Croxley Green			B1a	105	Detailed permission not started
Three Rivers	Valency House	Batchworth Lane	Northwood			B1a	865	Detailed permission not started
Three Rivers	45-47 Church Street		Rickmansworth			B1a	243	Detailed permission not started
Three Rivers	Cloisters House	High Street	Rickmansworth			B1a	0	Development in progress
Three Rivers	35 Church Street		Rickmansworth			B1a	78	Development in progress
Three Rivers	19 Church Street		Rickmansworth			B1a	144	Detailed permission not started
Three Rivers	4 Norfolk Road		Rickmansworth			B1a	56	Detailed permission not started
Three Rivers	Former Juniper Works	Quickley Lane	Chorleywood			B1c	0	Development in progress
Three Rivers	Imperial Machine Co Ltd	Harvey Road	Croxley Green			B1c	4921	Outline permission (known details)
Three Rivers	Edson Printers	Hunters Lane	Leavesden			B1c	0	Development in progress
Three Rivers	R/O & Inc 18-20 Ebury Road	High Street (south Side)	Rickmansworth			B1c	150	Detailed permission not started
Three Rivers	Napier House	Wharf Lane	Rickmansworth			B1c	0	Development in progress
Three Rivers	Ovaltine Site	Station Road	Kings Langley			B2	0	Development in progress
Three Rivers	134 Watford Road		Croxley Green			B8	400	Detailed permission not started
Three Rivers	Middleton Road	Mill End	Rickmansworth			B8	0	Development in progress
Three Rivers	331 Uxbridge Road		Rickmansworth			B8	602	Detailed permission not started
Three Rivers	Junction Park	Bridge Road	Abbots Langley			B0	0	Development in progress
Three Rivers	Siskin House	Marlins Meadow	Croxley Green			B1a	4735	Detailed permission not started
Three Rivers	Wolsey Business Park	Tolpits Lane	Rickmansworth			B1a	38	Detailed permission not started
Three Rivers	Happy Valley Industrial Estate	Primrose Hill	Kings Langley	B0	246			Detailed permission not started
Three Rivers	Abbott House	Primrose Hill	Kings Langley	B0	3528	B2	6200	Detailed permission not started
Three Rivers	Orbital 25 Business Park/Kenwood House	Dwight Road	Watford	B0	0	B8	0	Development completed
Three Rivers	Land Adj 244 Prestwick Road		South Oxhey	B1	2880			Outline permission (known details)
Three Rivers	Junction Park	Bridge Road	Abbots Langley	B1	111	B0	0	Development in progress
Three Rivers	Witney Place	Adj Hertford Place	Maple Cross	B1	11611	B0	0	Detailed permission not started
Three Rivers	Leavesden Aerodrome		Leavesden	B1	91000	B2	102878	Estimated site
Three Rivers	Adj Kebbell House	Delta Gain	Carpenders Park	B1	2110	SG	298	Estimated site
Three Rivers	R/O 115 New Road		Croxley Green	B1a	253			Detailed permission not started
Three Rivers	Wingfield Court	Hatters Lane	Croxley Green	B1a	495			Detailed permission not started
Three Rivers	Lakeside Management & Marketing Suite	Hatters Lane	Croxley Green	B1a	74			Detailed permission not started
Three Rivers	Orbital 25 Business Park	Dwight Road	Watford	B1a	2072			Detailed permission not started
Three Rivers	1a Church Lane		Sarratt	B1a	289	B1a	218	Detailed permission not started
Three Rivers	Petit Roque	5a New Road	Croxley Green	B1a	262	SG	370	Detailed permission not started
Three Rivers	Hilltop Farm	Hilltop Road	Kings Langley	B1a	903	SG	903	Detailed permission not started
Three Rivers	1-3 Old Mill Road		Kings Langley	B1a	241	SG	196	Detailed permission not started
Three Rivers	Rose Acre Barn	Bedmond Road	Pimlico	B1a	121	SG	95	Detailed permission not started
Three Rivers	Old Pavilion	Micklefield Hall	Sarratt	B1a	89	SG	89	Detailed permission not started
Three Rivers	Siskin House	Marlins Meadow	Croxley Green	B1a	194			Detailed permission not started
Three Rivers	Unit 12 Orbital 25 Business Park	Dwight Road	Rickmansworth	B1b	125	B0	125	Detailed permission not started
Three Rivers	Alpine Press	Station Road	Kings Langley	B1c	256			Detailed permission not started
Three Rivers	Unit 5 Moor Park Industrial Estate	Tolpits Lane	Rickmansworth	B2	397	B1c	397	Detailed permission not started
Three Rivers	Units 4a + 4b Green End Business Centre	93a Church Lane	Sarratt	B2	225	B1c	225	Detailed permission not started
Three Rivers	Adj Unit 6	Happy Valley Ind Estate	Kings Langley	B8	285			Detailed permission not started
Three Rivers	Orbital 25 Business Park	Dwight Road	Watford	B8	2427			Detailed permission not started
Three Rivers	Unit E	Home Park Industrial Estate	Kings Langley			B1b	1275	Development in progress
Three Rivers	Unit D	Home Park Industrial Estate	Kings Langley			B1b	1510	Detailed permission not started
Three Rivers	143 Community Way		Croxley Green			B1a	91	Detailed permission not started
Three Rivers	Witney Place	Adj Hertford Place	Maple Cross			B0	0	Detailed permission not started
Watford	374a St Albans Road		Watford			B1	153	Detailed permission not started
Watford	59 Whippendell Road		Watford			B1a	125	Detailed permission not started
Watford	25 Woodford Road		Watford			B1a	1409	Detailed permission not started
Watford	162-164 High Street		Watford			B1a	252	Detailed permission not started
Watford	1b Shakespeare Industrial Estate	Shakespeare Street	Watford			B1a	132	Detailed permission not started
Watford	Willow Grange	Church Road	Watford			B1a	5290	Detailed permission not started
Watford	18 Capel Road		Watford			B1c	68	Detailed permission not started
Watford	170-170a Whippendell Road		Watford			B2	654	Detailed permission not started
Watford	19 Bridle Path		Watford			B2	123	Detailed permission not started
Watford	428 Whippendale Road		Watford			B8	1858	Detailed permission not started
Watford	Phase 2a	Imperial Park	Watford	B0	4021			Detailed permission not started
Watford	Units 1-5 Polychrome Industrial Estate	Sandown Road	Watford	B0	5110	B2	5110	Detailed permission not started
Watford	117 Bushey Mill Lane		Watford	B0	2650	B8	2192	Detailed permission not started
Watford	242 High Street		Watford	B1	140			Outline permission (known details)
Watford	Carlos Industrial Estate	Water Lane	Watford	B1	560	B8	430	Detailed permission not started
Watford	1 & 2 Simmons Cottages	Colne Way	Watford	B1a	152			Detailed permission not started
Watford	Russells Site	Loates Lane	Watford	B1a	300			Development in progress
Watford	Rocket Medical	Imperial Way	Watford	B1a	2223	B0	497	Detailed permission not started
Watford	26 Exchange Road		Watford	B1a	702	B1	0	Development in progress
Watford	9, 9a & 9b Langley Road		Watford	B1a	128	B1a	0	Development in progress
Watford	16-20 Upton Road		Watford	B1c	2286	B1a	800	Detailed permission not started
Watford	Rembrandt House	Hagden Lane	Watford	B2	303			Detailed permission not started
Watford	Units 2 & 3 Finway Court	Whippendell Road	Watford	B2	523	B1	523	Detailed permission not started
Watford	Building A Riverside Works	Riverside Road	Watford	B2	417	B2	0	Development in progress
Watford	Unit 4 Odhams Trading Estate	Access Road	Watford	B2	1397	B8	1397	Detailed permission not started
Watford	Adj 3 Regal Way		Watford	B8	1612			Detailed permission not started
Watford	Balmoral Centre	Clive Way	Watford	B8	796			Outline permission (known details)
Watford	Unit 2 Brookside	Colne Way	Watford	B8	300			Detailed permission not started
Watford	16 Caxton Way		Watford	B8	543	B1	592	Detailed permission not started
Dacorum	31 HIGH STREET, HEMEL HEMPSTEAD, HP1 3AA					B1	52	under construction
Dacorum	283 HIGH STREET, BERKHAMSTED, HP4 1AJ					B1	90	not started

Dacorum	CHILTERN HILLS WATER COOLERS, TOMS HILL, ALDBURY, TRING, HERTS, HP235SD				B1	57	Not started	
Dacorum	PARADISE FARM, POTASH LANE, LONG MARSTON, TRING		B2	285			not started	
Dacorum	FRAME ONE PHOTOGRAPHY, 23 HIGH STREET, HEMEL HEMPSTEAD, HP1 3AA				B1	230	not started	
Dacorum	2 PRINCE EDWARD STREET, BERKHAMSTED, HP4 3EZ		B1	114			not started	
Dacorum	76 HIGH STREET	MARKYATE	B1	323			Not started	
Dacorum	76 WESTERN ROAD, TRING, HP23 4BB				B1	170	not started	
Dacorum	1-4 KIMPS WAY, HEMEL HEMPSTEAD		B2	232	B2	232	not started	
Dacorum	HILL & COLES FARM, LONDON ROAD, FLAMSTEAD, ST. ALBANS, AL3 8HA		B1	250			Not Started	
Dacorum	UNIT 3, SITE 1, NORTHBRIDGE ROAD, BERKHAMSTED, HERTS		B8	251	B1	251	not started	
Dacorum	20 KINGS ROAD, BERKHAMSTED, HP4 3BD				B1	185	not started	
Dacorum	DRIVER CONSTRUCTION, 9 AKEMAN STREET, TRING, HP236AB		B1	173			not started	
Dacorum	EX TRIDENT CAR SALES, HICKS ROAD, MARKYATE, ST. ALBANS		B1	187			not started	
Dacorum	UNIT 1 HICKS ROAD	MARKYATE			B2	326	Detailed O/S	
Dacorum	104A, HIGH STREET, TRING, HP234AF				B1	138	not started	
Dacorum	SAPPI EUROPE LTD	LOWER ROAD, NASH MILLS	HEMEL HEMPSTEAD	B8	356		Not Started	
Dacorum	DOCTORS SURGERY, THE OLD FORGE, HIGH STREET, TRING, HP235AG		B1	131			not started	
Dacorum	SWAN COURT	WATERHOUSE STREET	HEMEL HEMPSTEAD		B1	590	Not started	
Dacorum	21-21A HIGH STREET		HEMEL HEMPSTEAD	B1	139		not started	
Dacorum	76 HIGH STREET, MARKYATE, ST. ALBANS, HERTS, AL3 8LF		B1	323			not started	
Dacorum	UNIT 3 SITE ONE	NORTHBRIDGE ROAD	BERKHAMSTED	B8	251	B1	251	not started
Dacorum	THE TITHE BARN, PARSONAGE PLACE, TRING, HP234AG		B1	248			not started	
Dacorum	JARMANS, 44 HIGH STREET, BOVINGDON, HEMEL HEMPSTEAD, HP3 0HJ				B2	122	not started	
Dacorum	235-237 LONDON ROAD		HEMEL HEMPSTEAD	B1	410	B2	395	Not started
Dacorum	H E STRINGER LTD, ICKNIELD WAY INDUSTRIAL ESTATE, ICKNIELD WAY, TRING, HP234JZ				B2	695	under construction	
Dacorum	52 HIGH STREET, BOVINGDON, HEMEL HEMPSTEAD, HP3 0HJ		B1	130			not started	
Dacorum	ICW POWER	STAG LANE	BERKHAMSTED	B1	712		Not started	
Dacorum	DIXONS 200 THE CAMPUS	MAYLANDS AVENUE	HEMEL HEMPSTEAD	B1	803		Not started	
Dacorum	EATON COURT	MAYLANDS AVENUE	HEMEL HEMPSTEAD	B1	625		not started	
Dacorum	BADGERS WOOD, WATER END ROAD, POTTEN END, BERKHAMSTED, HP4 2SH		B1	110			not started	
Dacorum	KNOLL HOUSE	MAYLANDS AVENUE	HEMEL HEMPSTEAD			B1	850	Not started
Dacorum	WAREHOUSE	R/O 6 BELTON ROAD	BERKHAMSTED			B8	357	Not started
Dacorum	28 MARK ROAD		HEMEL HEMPSTEAD	B1	560	B1	466	Not started
Dacorum	ADJ SPECTRA HOUSE	BOUNDARY WAY	HEMEL HEMPSTEAD	B1	541			under construction
Dacorum	CASTLE MILL	LOWER KINGS ROAD	BERKHAMSTED			B1	936	Not started
Dacorum	HARROW YARD, AKEMAN STREET, TRING, HP236AA				B1	596	under construction	
Dacorum	SHARLOWES FARM		FLAUNDEN	B1	960			Not Started
Dacorum	GORSESIDE, BERKHAMSTED HILL, BERKHAMSTED				B1	330	not started	
Dacorum	TWINMAR LTD	MAXTED ROAD	HEMEL HEMPSTEAD	B8	900			not started
Dacorum	AVIATION HOUSE, NORTHBRIDGE ROAD, BERKHAMSTED, HP4 1EL		B8	650	B1	550	not started	
Dacorum	KINGS LANGLEY BUILDING SUPPLIES LTD, THE NAP, KINGS LANGLEY, WD4 8ES				B8	360	not started	
Dacorum	RECTORY FARM, RECTORY LANE, KINGS LANGLEY, WD4 8HG		B1	1100			not started	
Dacorum	DUNSLEY FARM, LONDON ROAD, TRING, HP236HA		B2	379			not started	
Dacorum	BALSHAW HEATH, BULLBEGGARS LANE, POTTEN END, BERKHAMSTED, HER				B1	229	not started	
Dacorum	ADJ PARADISE	PARK LANE	HEMEL HEMPSTEAD	B1	865	B1	897	Under Construction
Dacorum	SITE 3, NORTHBRIDGE ROAD, BERKHAMSTED		B8	150	B0	104	not started	
Dacorum	R/O 121 HIGH STREET		BERKHAMSTED	B1	563			Not started
Dacorum	HERTFORDSHIRE HOUSE	WOOD LANE	HEMEL HEMPSTEAD	B1	1640	B1	1158	Under Construction
Dacorum	GOLDEN WEST FOODS LTD	THREE CHERRY TREES LANE	HEMEL HEMPSTEAD	B1	1952			Not started
Dacorum	2A FINWAY ROAD, HEMEL HEMPSTEAD, HERTS, HP2 7PT		B8	250	B2	250	not started	
Dacorum	5 STAR ACCIDENT REPAIR CENTRE LTD, WOOD LANE, HEMEL HEMPSTEAD, HP2 4TF		B2	242			not started	
Dacorum	2A FINWAY ROAD, HEMEL HEMPSTEAD, HERTS, HP2 7PT		B8	250	B2	250	not started	
Dacorum	221-233 HIGH STREET		BERKHAMSTED			B1	1325	Not started
Dacorum	WATER END GARAGE, LEIGHTON BUZZARD ROAD, WATER END, HEMEL HEMPSTEAD, HP1 3BC				B8	228	not started	
Dacorum	OPP SCHOOL HOUSE FARM	OLD WATLING STREET	MARKYATE			B8	560	not started
Dacorum	IVY FARM, PEPPERSTOCK, LUTON, LU1 4LQ				B2	200	not started	
Dacorum	BOXTED FARM, BERKHAMSTED ROAD, HEMEL HEMPSTEAD, HP1 2SQ			B8	1977			not started
Dacorum	CHILTERN HILLS W/COOLERS	TOMS HILL	ALDBURY	B8	341			Not started
Dacorum	KINGS LANGLEY RIDING SCHOOL, CHIPPERFIELD ROAD, KINGS LANGLEY, WD4		B1	216				not started
Dacorum	FOURWAYS GARAGE, HUDNALL CORNER, LITTLE GADDESSEN, BERKHAMSTED				B2	1028	not started	
Dacorum	DANONE WATERS (UK) LTD, TOMS HILL, ALDBURY, TRING		B2	138				not started
Dacorum	WATLING STREET	FLAMSTEAD	B8	1524	B2	1524	not started	
Dacorum	PRIMROSE ENGINEERING CO LTD, ADEYFIELD ROAD, HEMEL HEMPSTEAD, HP2 5DA				B2	1100	under construction	
Dacorum	SPECTRA HOUSE, BOUNDARY WAY, HEMEL HEMPSTEAD, HERTS, HP2 7SH		B1	541				not started
Dacorum	SPECTRA HOUSE, BOUNDARY WAY, HEMEL HEMPSTEAD, HP2 7SH		B1	2412	B2	1858	not started	
Dacorum	5 & 6, MAXTED ROAD, HEMEL HEMPSTEAD, HP2 7DX		B2/B8	2744	B2/B8	2290	under construction	
Dacorum	HOLBROOK, LONG LANE, BOVINGDON, HEMEL HEMPSTEAD, HP3 ONE		B1	182			not started	
Dacorum	HOLBROOK, LONG LANE, BOVINGDON, HEMEL HEMPSTEAD, HP3 ONE		B8	182			not started	
Dacorum	NEW GROUND FARM	NEW GROUND ROAD	ALDBURY	B1	1675			not started
Dacorum	NEWGROUND FARM, NEWGROUND ROAD, ALDBURY, TRING, HP235RD		B1	1675			not started	
Dacorum	THE BOXMOOR TRUST CENTRE, LONDON ROAD, HEMEL HEMPSTEAD, HP1 2RE		B1	400	B1	120	under construction	
Dacorum	MAYLANDS HOUSE	MAYLANDS AVENUE	HEMEL HEMPSTEAD	B1	3696	B1	1900	Not started
Dacorum	HILL & COLES FARM, LONDON ROAD, FLAMSTEAD, ST. ALBANS, AL3 8HA		B2	395				not started
Dacorum	THE MILL SITE	TRING ROAD	WILSTONE			B2	1215	Under construction
Dacorum	PILLING MOTOR GROUP LTD, LONDON ROAD, BOXMOOR, HEMEL HEMPSTEAD, HERTFORDSHIRE, HP3 9AA		B1	6908				not started
Dacorum	MISWELL LANE/ICKNIELD WAY		TRING	B1	3200			Estimate
Dacorum	TRAVIS PERKINS, LAWN LANE, HEMEL HEMPSTEAD, HP3 9HR		B2	900	B2	1885	not started	
Dacorum	FORMER KODAK SITE, LEIGHTON BUZZARD ROAD/, COTTERELLS, HEMEL HEMPSTEAD				B1	14120	under construction	
Dacorum	LUCAS SITE	MAYLANDS AVENUE	HEMEL HEMPSTEAD	B1	10160	B2	7860	Not started
Dacorum	EEB DEPOT, WHITELEAF ROAD, HEMEL HEMPSTEAD, HP3				B1/B2	1428	not started	
Dacorum	SITE B	EX JOHN DICKINSON LTD	HEMEL HEMPSTEAD	B1	2484			Not started
Dacorum	FORMER DUPONT WORKS, MAYLANDS AVENUE, HEMEL HEMPSTEAD, HP2 7DP		B2	10104	B1/B8	5499	under construction	
Dacorum	HORIZON POINT, EASTMAN WAY, HEMEL HEMPSTEAD, HP2 7FT		B8	14901		0	Not started	
Dacorum	PHASE 3 3COM	BOUNDARY WAY	HEMEL HEMPSTEAD	B1	9813			Not started
Dacorum	TOMS HILL ESTATE, TOMS HILL, ALDBURY, TRING				B1	2645	not started	

Dacorum	GAS BOARD SITE	R/O LONDON ROAD	HEMEL HEMPSTEAD			B8	7330	Estimate
Dacorum	KODAK SPORTS GROUND	BUNCEFIELD LANE/WOOD LANE	HEMEL HEMPSTEAD	B1	11200			Estimate
Dacorum	LUCAS SITE	MAYLANDS AVENUE	HEMEL HEMPSTEAD	B1	10160			1 office block complete. Other outstanding.
Dacorum	STAGS END HOUSE, GADDESSEN ROW, HEMEL HEMPSTEAD, HP2 6HN					B1	840	not started
Dacorum	GOSSOMS END/STAG LANE		BERKHAMSTED			B1	7572	under construction
Dacorum	LAND OFF, STAG LANE, BERKHAMSTED					B2	6000	under construction
Dacorum	KINGS LANGLEY RIDING SCHOOL, CHIPPERFIELD ROAD, KINGS LANGLEY, WD4			B1	109			under construction
Dacorum	LUCAS SITE PHASE 2	MAYLANDS AVENUE	HEMEL HEMPSTEAD	B1	27060			Not started
Dacorum	PEOPLEBUILDING HEMEL (PART OF EX LUCAS SITE), MAYLANDS AVENUE, HEMEL HEMPSTEAD, HP2 4SP			B1	31480			not started
Dacorum	BUNCEFIELD OIL TERMINAL, GREEN LANE, HEMEL HEMPSTEAD, HERTS, HP2 7JA			B8	31738			under construction
Dacorum	BREAKSPEAR PARK, BREAKSPEAR WAY, HEMEL HEMPSTEAD, HP2 4UL			B1	350			not started
Dacorum	GIST, THREE CHERRY TREES LANE, HEMEL HEMPSTEAD, HP2 7PZ			B8	953			not started
Dacorum	GIST, THREE CHERRY TREES LANE, HEMEL HEMPSTEAD, HP2 7PZ			B8	953			not started
Dacorum	UNITS 1 & 2, 1 BOUNDARY WAY, HEMEL HEMPSTEAD, HP2			B1/B8	36013	B1/B2	36013	under construction
Dacorum	THREE CHERRY TREES LANE	(EAST)	HEMEL HEMPSTEAD	B1	66400			Estimate
Dacorum	LOWER GADE FARM, DAGNALL ROAD, GREAT GADDESSEN, HEMEL HEMPSTEAD, HP1 3BF			B1	185			not started
Dacorum	HAMMER LANE DEPOT, EVEREST WAY, HEMEL HEMPSTEAD, HERTS, HP2 4HY			B8	742	B8	761	not started
Dacorum	WOODWELLS FARM(LAND ADJ TO) BUNCEFIELD LANE HEMEL HEMPSTEAD HERTS			B8	2725			not started
Dacorum	FANTASTIC FIREWORKS LTD, BIRCHIN GROVE FARM, HALFMOON LANE, PEPPERSTOCK, LUTON, LU1 4LL			B1	86			not started
Dacorum	HILL FARM, PIPERS LANE, MARKYATE, ST. ALBANS, HERTS, AL3 8QG			B1	808			not started
Dacorum	BOVINGDON BRICKWORKS LTD, LEYHILL ROAD, BOVINGDON, HEMEL HEMPSTEAD, HERTFORDSHIRE, HP3 0NW			B2	149			not started
Dacorum	CHERRY TREE FARM, CHESHAM ROAD, WIGGINTON, TRING, HERTS, HP236JG			B8	167			not started
Dacorum	UNIT 5, FINWAY ROAD, HEMEL HEMPSTEAD			B1	3101	B8	1301	not started
Dacorum	GOLDEN WEST FOODS LTD, THREE CHERRY TREES LANE, HEMEL HEMPSTEAD, HERTS, HP2 7HG			B2	1952			not started
Dacorum	DUNSLEY FARM, LONDON ROAD, TRING, HP236HA			B2	555			not started
Dacorum	2 THE WATERHOUSE, WATERHOUSE STREET, HEMEL HEMPSTEAD, HP1 1ES					B1	116	not started
Dacorum	ASHLYNS HALL, CHESHAM ROAD, BERKHAMSTED, HERTFORDSHIRE, HP4 2ST			B1	136			under construction
Dacorum	LAMINAR MEDICA, TRING BUSINESS CENTRE, ICKNIELD WAY INDUSTRIAL ESTATE, ICKNIELD WAY, TRING, HERTS, HP23 4J			B2	194			under construction
Hertsmere	Watch Tower Unit 1	Manor Point	Borehamwood	B0	740			Detailed permission not started
Hertsmere	Cranborne Road		Potters Bar	B0	9700			Long Term or Safeguarded Site
Hertsmere	Chase Farm	Stagg Hill	Potters Bar	B0	512			Development in progress
Hertsmere	Home Farm Munden	Munden	Aldenham	B1	1124			Development in progress
Hertsmere	Clarendon Park	Off Grosvenor Road	Borehamwood	B1	424			Detailed permission not started
Hertsmere	Centennial Park	Centennial Avenue	Elstree	B1	5582			Development in progress
Hertsmere	Repton Lodge Wall Hall	Wall Hall Drive	Aldenham	B1a	130			Development in progress
Hertsmere	Studio Plaza	Elstree Way	Borehamwood	B1a	1853			Detailed permission not started
Hertsmere	Clare Hall	Blanche Lane	Ridge	B1b	8295			Outline permission (known details)
Hertsmere	Phase 3 Clare Hall	Blanch Lane	Ridge	B1b	1961			Development in progress
Hertsmere	Nibsc Site	Blanche Lane	Ridge	B1b	4904			Outline permission (known details)
Hertsmere	N I B S C	Blanche Lane	Ridge	B1b	2160			Detailed permission not started
Hertsmere	Porcelanosa	1-6 Otterspool Way	Bushey	B8	744			Detailed permission not started
Hertsmere	Unit C Greatham Road		Bushey			B0	1077	Detailed permission not started
Hertsmere	14 Theobald Street		Borehamwood			B1	160	Detailed permission not started
Hertsmere	Foster House	Maxwell Road	Borehamwood			B1a	0	Detailed permission not started
Hertsmere	Pinnacle Insurance	New Horizons	Borehamwood	B1a	15000	B1a	7175	Outline permission (known details)
Hertsmere	Hillside Studio	Merry Hill Road	Bushey			B1b	0	Detailed permission not started
Hertsmere	101 Glencoe Road		Bushey			B1c	120	Detailed permission not started
Hertsmere	Gullimore Farm	Sandy Lane	Bushey			B1c	0	Detailed permission not started
Hertsmere	60 + R/O 70-78 High Street		Bushey	B1a	212	B1c	107	Detailed permission not started
Hertsmere	Control House	9 Station Road	Radlett	B1a	270	B1c	270	Detailed permission not started
Hertsmere	Bonus Print	Stirling Way	Borehamwood	B1c	1140	B1c	5324	Detailed permission not started
Hertsmere	Centennial Park	Centennial Avenue	Elstree			B2	0	Development in progress
Hertsmere	Centennial Park	Elstree Hill South	Elstree	B0		B2	0	Detailed permission not started
Hertsmere	Nc Engineering Ltd	1-5 Park Avenue	Bushey	B1	580	B2	281	Detailed permission not started
Hertsmere	The Marians	Barnet Lane	Elstree			B8	0	Detailed permission not started
Welwyn Hatfield	SHIRE PARK PHASE 3, WGC AL7 1SQ			B1	7785			Not started
Welwyn Hatfield	FORMER GSK SITE, MUNDELLS			B8	18508			Not started
Welwyn Hatfield	BESSEMER ROAD/BRIDGE ROAD EAST, WGC			B8	929			In Progress
Welwyn Hatfield	LAND R/O 21A BROADWATER ROAD, WGC					B2	210	Not started
Welwyn Hatfield	29 BROWNFIELDS			B1a	160			Not started
Welwyn Hatfield	CIRRUS BUILDING, 1A SHIRE PARK, WGC			B1	90			Not started
Welwyn Hatfield	26 BRIDGE ROAD EAST			B1	1881			In Progress
Welwyn Hatfield	UNIT 5 SWALLOW COURT			B1a	434	B8	434	Not started
Welwyn Hatfield				B Mix	1840			Not started
Welwyn Hatfield	20 BLACK FAN ROAD			B1	18777	B8	18908	Not started
Welwyn Hatfield	40 BROADWATER ROAD			B1	186			In Progress
Welwyn Hatfield	1 WATCHMEAD			B2	4081	B8	4081	Not started
Welwyn Hatfield				B1	120	B8	108	Not started
Welwyn Hatfield	34 BURROWFIELD			B1c	210			Not started
Welwyn Hatfield				B8	727			Not started
Welwyn Hatfield	LAND OPPOSITE 50-52 BURROWFIELD			B1c	534			Not started
Welwyn Hatfield	23 BURROWFIELD			B1a	333	B1	113	Not started
Welwyn Hatfield	JOHN DOYLES HOUSE, LITTLE BURROW, WGC			B1	556			Not started
Welwyn Hatfield	6 LITTLE BURROW, BURROWFIELDS, WGC			B Mix	4102	B8	185	Not started
Welwyn Hatfield	160 GREAT NORTH ROAD, HATFIELD			B2	74			Not started
Welwyn Hatfield	164 GREAT NORTH ROAD, HATFIELD			B1	512	B2	211	In Progress
Welwyn Hatfield	150 GREAT NORTH ROAD					B2	68	Not started
Welwyn Hatfield	40 BEACONSFIELD ROAD, HATFIELD			B1	1712	B1c	1063	Not started
Welwyn Hatfield	1 BURY ROAD			B2	716	B2	560	Not started
Welwyn Hatfield	UNIT 3, FIDDLE BRIDGE LANE					B1	54	Not started
Welwyn Hatfield	HATFIELD AERODROME, COMET WAY			B Mix	34383			In Progress
Welwyn Hatfield	THE IO CENTRE, HEARLE WAY			B Mix	779			Not started
Welwyn Hatfield	North Site Project, Mosquito Way			B1	14318			Not started
Welwyn Hatfield	South Site Project, Mosquito Way			B1	8812			Not started

Welwyn Hatfield	Plot 1700, off Mosquito Way		B8	2338			Not started	
Welwyn Hatfield	Ocado, Gypsy Moth Avenue		B1a	9241			Not started	
Welwyn Hatfield	LAND ADJ. TO NELSON HOUSE, SOPERS ROAD		B8	72			Not started	
Welwyn Hatfield	TILGEAR, BRIDGE HOUSE, STATION ROAD		B1	1350	B8	830	Not started	
Welwyn Hatfield	GLADE WORKS, SOPERS ROAD		B1c	405			Not started	
Welwyn Hatfield	46 THE COMMON	HATFIELD	B1a	2135	B2	2336	Not started	
Welwyn Hatfield	CECIL SAWMILL, HATFIELD PARK	HATFIELD	B1	1552			Not started	
Welwyn Hatfield		HATFIELD	B1	456	B1	0	In Progress	
Welwyn Hatfield		HATFIELD			B2	456	In Progress	
Welwyn Hatfield	QUALITY HOTEL, ROEHYDE WAY, HATFIELD	HATFIELD	B1a	71			Not started	
Welwyn Hatfield		HATFIELD	B1a	184			Not started	
Welwyn Hatfield	L/a Lemsford Road & St Peters Close	HATFIELD			B1	1900	Not started	
Welwyn Hatfield	THE MELON GROUND, HATFIELD PARK	HATFIELD	B1a	421			Not started	
Welwyn Hatfield	74-78 TOWN CENTRE	HATFIELD	B1	819			In Progress	
Welwyn Hatfield	MILL GREEN WORKSHOPS, MILL GREEN	HATFIELD			B1	182	Not started	
Welwyn Hatfield	GSK, THE FRYTHE, DIGSWELL HILL, WELWYN	OTHER	B1a	707			Not started	
Welwyn Hatfield	SWANLEY BAR FARMHOUSE	OTHER	B1b	8095			Not started	
Welwyn Hatfield	3 DELLSOME LANE, WELHAM GREEN	OTHER	B1a	202			In Progress	
Welwyn Hatfield		WELHAM GREEN			B1	258	Not started	
Welwyn Hatfield	FOUNTAIN HOUSE, 1-7 HOWARDSGATE	WGC	B1a	3315	B1a	2304	Not started	
Welwyn Hatfield	OSBORNE HOUSE, 35-47 HOWARDSGATE	WGC			B1a	1401	Not started	
Welwyn Hatfield	THE HOWARD CENTRE, HOWARDSGATE	WGC			B1	930	Not started	
Welwyn Hatfield	47-51 FRETHERNE ROAD	WGC	B8	410			Not started	
Welwyn Hatfield	ROSANNE HOUSE, PARKWAY	WGC			B1a	440	In Progress	
Welwyn Hatfield	21 STONEHILLS	WGC			B1a	1898	Not started	
St Albans	36 Station Road	WGC			B1a	139	Not started	
St Albans	86-90 High Street	Harpenden			B1	433	Detailed permission not started	
St Albans	36 Lattimore Road	Harpenden			B1	400	Detailed permission not started	
St Albans	34-36 Verulam Road	St Albans			B1	284	Detailed permission not started	
St Albans	13a Heath Road	St Albans			B1	171	Detailed permission not started	
St Albans	145 Victoria Street	St Albans			B1	93	Detailed permission not started	
St Albans	156 Sandridge Road	St Albans			B1	32	Detailed permission not started	
St Albans	1-5 College Street	St Albans			B1	998	Detailed permission not started	
St Albans	55 London Road	St Albans			B1	633	Detailed permission not started	
St Albans	2a Royal Road	St Albans			B1a	274	Detailed permission not started	
St Albans	35 Centurion Court	St Albans			B1a	80	Detailed permission not started	
St Albans	Units 4-7	83 Camp Road	St Albans		B1a	71	Detailed permission not started	
St Albans	Bowers Parade/R/O 12-16 Bowers Way	49-51 Brewhouse Hill	Wheathampstead		B1a	465	Detailed permission not started	
St Albans	R/O 75 Verulam Road	49 High Street	Harpenden		B1c	1006	Detailed permission not started	
St Albans	Corrys Farm	Roestock Lane	St Albans		B2	91	Detailed permission not started	
St Albans	The Timberyard	Roestock Lane	Colney Heath		B8	376	Detailed permission not started	
St Albans	16 Radlett Road		Colney Heath		B8	50	Detailed permission not started	
St Albans	Former Highways Depot	Wynchlands Crescent	Frogmore		B8	268	Detailed permission not started	
St Albans	Adj Waterside Cottage	Drop Lane	St Albans		B8	345	Detailed permission not started	
St Albans	29 High Street		Bricket Wood		B1	48	Development in progress	
St Albans	Kingsbury Farm/	Express Dairy	Harpenden		B1	374	Development in progress	
St Albans	Co-op Dairy	Burleigh Road	St Albans		B8	1711	Development in progress	
St Albans	222 London Road	(british Shipbuilders)	St Albans		B1c	1119	Estimated site	
St Albans	Wheathampstead Education Centre	Butterfield Road	St Albans		B2	3920	Estimated site	
St Albans	Former Ariston Works Site	Harpenden Road	Wheathampstead		B1a	5800	Outline permission (known details)	
St Albans	Former Eversheds Works	Alma Road	St Albans		B1a	800	Section 106 agreement pending	
St Albans	Kyngston House	Inkerman Road	St Albans		B2	5850	Section 106 agreement pending	
St Albans	222 London Road		St Albans		B8	586	Section 106 agreement pending	
St Albans	Wood End Farm	Cherry Tree Lane	St Albans	B0	450		Detailed permission not started	
St Albans	Barns At Scout Farm	Dunstable Road	Hemel Hempstead	B1	827		Detailed permission not started	
St Albans	Williams Yard	1a Ronsons Way	Redbourn	B1	225		Detailed permission not started	
St Albans	Land At St Albans City Station	Victoria Street	Sandridge	B1	480		Detailed permission not started	
St Albans	The Flat	Cunningham Library	St Albans	B1	259		Detailed permission not started	
St Albans	19a Watsons Walk		St Albans	B1	56		Detailed permission not started	
St Albans	63 Campfield Road		St Albans	B1	68		Detailed permission not started	
St Albans	8-10 Upper Marlborough Rd		St Albans	B1	268		Detailed permission not started	
St Albans	Adj Tithe Barn	Harpendbury Farm	St Albans	B1	488		Detailed permission not started	
St Albans	Plot 23 Porters Wood		Redbourn	B1	340		Development in progress	
St Albans	Moat Factory	High Street	St Albans	B1	1754		Development in progress	
St Albans	The Mansion House	Bonehill	Wheathampstead	B1	371	B1	0	Development in progress
St Albans	Turners Hall Farm	Annables Lane	Chiswell Green	B1a	729		Detailed permission not started	
St Albans	55 Victoria Street		Kinsbourne Green	B1a	400		Detailed permission not started	
St Albans	Pearce Recycling Group	Acrewood Way	St Albans	B1a	1490		Detailed permission not started	
St Albans	9 Old Parkbury Lane		St Albans	B1a	644	B1a	298	Detailed permission not started
St Albans	63 High Street		Colney Street	B1a	262	B8	141	Detailed permission not started
St Albans	Ridgmont Road		Harpenden	B1a	1280	B8	860	Detailed permission not started
St Albans	Rothamsted Research	West Common	St Albans	B1a	3300		Estimated site	
St Albans	Irradion House	Southdown Industrial Estate	Harpenden	B1b	1361		Development in progress	
St Albans	9 Old Parkbury Lane		Harpenden	B1b	1410	B1c	1011	Section 106 agreement pending
St Albans	Unit 4 Old Parkbury Lane	Colney Street	Colney Street	B1c	594		Detailed permission not started	
St Albans	134 Ashley Road		Radlett	B8	2112		Detailed permission not started	
St Albans	34 Coldharbour Lane		St Albans	B8	1410		Detailed permission not started	
St Albans	Punchbowl Lane	Cherry Tree Lane	Harpenden	B8	264	B8	333	Detailed permission not started
Broxbourne	Britannia Road and Lea Road		Hemel Hempstead	B8	14800		Estimated site	
Broxbourne	1		Waltham Cross	B8		984		
Broxbourne	2		NE Hoddesdon	B2		430		
Broxbourne	3		NE Hoddesdon	B1c/B8		1,440		
Broxbourne	4		NE Hoddesdon	B1c/B8		1,910		
Broxbourne			NE Hoddesdon	B8		3,808		

Broxbourne	6		NE Hoddesdon	B8	281	
Broxbourne	7		NE Hoddesdon	B2/B8	595	
Broxbourne	8		NE Hoddesdon	B2/B8	798	
Broxbourne	9		NE Hoddesdon	B8	870	
Broxbourne	10		NE Hoddesdon	B2/B8	988	B2/B8 607
Broxbourne	11		NE Hoddesdon	B2	1,784	
Broxbourne	12		NE Hoddesdon	B2/B8	1,951	
Broxbourne	13		NE Hoddesdon	B2	2,490	
Broxbourne	14		NE Hoddesdon	B8	2,922	
Broxbourne	15		NE Hoddesdon	B2/B8	3,234	
Broxbourne	16		NE Hoddesdon	B8	3,252	
Broxbourne	17		NE Hoddesdon	B8	6,448	
Broxbourne	18		NE Hoddesdon	B8	8,682	
Broxbourne	19		NE Hoddesdon	B8	13,941	
Broxbourne	20		NE Hoddesdon	B8	19,509	
Broxbourne	Batching Plant		Park Plaza	B2	3,751	
Broxbourne	Printworks		Park Plaza	B2	83,164	
Broxbourne	Co-op Land		Park Plaza	B0	32,650	
Broxbourne	2 St Michaels Road		Other			B2 69
Broxbourne	R/O 61-71 High Street		Other	B2	558	B2 122
Broxbourne	Aro House/Wellington House		Waltham Cross	B1a	285	B1a
Broxbourne	Hertford Road - MSD		Waltham Cross	B1b	14,849	B1b 155
Broxbourne	Park Plaza Office		Park Plaza	B1	21,535	
Broxbourne	Park Plaza Office		Park Plaza	B1	3,465	
Broxbourne	2 St Michaels Road		Other	B1	100	
Broxbourne	Fitzpatrick Contractors Ltd		Other	B1a	2,136	B1a 786

APPENDIX FOUR

Business Space Sectors

Industrial Sectors	SIC (2003)	Activities
Manufacturing	15.11-37.20 (ex publishing, 22.11-22.15)	<ul style="list-style-type: none"> ▪ Includes all manufacturing, including recycling, but excludes publishing)
Some Construction	45.3-45.4	<ul style="list-style-type: none"> ▪ Electricians ▪ Plumbing ▪ Other building installation ▪ Plastering ▪ Joinery installation ▪ Floor and wall covering ▪ Painting and glazing ▪ Other building completion
Motor Vehicle Activities	50.20, 50.40	<ul style="list-style-type: none"> ▪ Maintenance and repair of motor vehicles ▪ Sale, maintenance and repair of motor cycles and related parts and accessories
Sewage and Refuse Disposal	90.00	<ul style="list-style-type: none"> ▪ Sewage and refuse disposal, ▪ Sanitation and similar activities.
Labour Recruitment and Provision of Personnel (part) ¹	74.5	<ul style="list-style-type: none"> ▪ Labour recruitment and provision of personnel
Warehousing Sectors	SIC (2003)	Activities
Wholesale	51.11-51.70	<ul style="list-style-type: none"> ▪ Wholesale on a fee contract basis ▪ Wholesale of goods
Freight Transport by Road	60.24	
Cargo Handling	63.11	
Storage and Warehousing	63.12	
Other Supporting Land Transport Activities	63.21	
Post and Courier Activities	64.11-64.12	
Packaging Activities	74.82	<ul style="list-style-type: none"> ▪ Packaging activities

¹ Labour Recruitment and Provision of Personnel covers all the workers employed through agencies. These workers operate in a wide range of activities throughout the economy. Therefore, we allocate them to industrial, warehouse, office and non-B sectors in proportion to their shares in Crawley's total employment.

Labour Recruitment and Provision of Personnel (part)	74.5	
Office Sectors (including R&D)	SIC (2003)	Activities
Some Other Business Activities	74.60, 74.85, 74.86, 74.87, 74.1, 74.2, 74.3, 74.4	<ul style="list-style-type: none"> ▪ Investigation and security activities ▪ Secretarial and translation activities ▪ Call centre activities ▪ Other business activities nec ▪ Accounting/bookkeeping activities etc ▪ Architectural/engineering activities etc ▪ Technical testing and analysis ▪ Advertising
Office Sectors (continued) Some Social and Personal Service Activities	91.11, 91.12, 91.20, 91.32, 91.33, 92.11, 92.12, 91.20, 91.32, 91.33, 92.11, 92.12, 92.20, 92.40	<ul style="list-style-type: none"> ▪ Activities: business/employers orgs ▪ Activities of professional orgs ▪ Activities of trade unions ▪ Activities of political orgs ▪ Activities other membership orgs ▪ Motion picture and video production ▪ Motion picture and video distribution ▪ Radio and television activities ▪ News agency activities
Administration of the State	75.1, 75.3	<ul style="list-style-type: none"> ▪ Administration of the State and the economic and social policy of the community ▪ Compulsory social services activities
Publishing	22.1	

Financial intermediation	65, 66, 67	<ul style="list-style-type: none"> ▪ Financial intermediation, except insurance and pension funding ▪ Insurance and pension funding, except compulsory social security ▪ Activities auxiliary to financial intermediation
Real Estate and Business activities	70, 72, 73	<ul style="list-style-type: none"> ▪ Real estate activities ▪ Computer and related activities ▪ Research and development
Labour Recruitment and Provision of Personnel (part)	74.5	

APPENDIX FIVE

Land Supply & Demand 06-31

LAND DEMAND AND SUPPLY 2006-31

Introduction

This appendix is an extension to Chapter 7 of the main report, showing the employment forecasts and floorspace requirements to 2031

Employment Change in the Preferred Scenario

Table 1 Total Employment, 2006-31, London Arc

	2006	2031	Change 06-31	% Change 06-31
Broxbourne	39,938	42,399	2,461	6%
Dacorum	68,866	87,014	18,148	26%
Hertsmere	48,342	59,748	11,405	24%
St Albans	69,587	69,408	-179	0%
Three Rivers	38,584	41,246	2,662	7%
Watford	57,147	65,852	8,705	15%
Welwyn Hatfield	72,573	90,315	17,741	24%
London Arc	395,037	455,981	60,943	15%

Source Oxford Economics

The forecasts show, over the 25 year period, 60,900 net new jobs for the Hertfordshire London Arc, a growth of 15%. Amongst the districts, much of the growth is concentrated in Dacorum (18,100 jobs) and Welwyn Hatfield (17,800 jobs). The remaining districts gain fewer than 11,500 jobs. St Albans loses 180 jobs - in effect virtually remains the same as its 2006 base figure.

In proportional terms, Dacorum, Hertsmere and Welwyn Hatfield show the most growth, around 25%. All other districts show growth of less than 15%. St Albans as noted above shows no growth.

B Space Employment

The method and sectors used to identify b space employment is discussed in Chapter 7 of the report. The Industrial employment forecasts over the 25 years fall by 9,600 jobs for the Hertfordshire London Arc, a decline of 24%. Most districts show losses of 1,000- 2,300 jobs and 20%-30%.

Table 2 Industrial Jobs,2006-31 Hertfordshire London Arc

Jobs	2006	2031	Change 06-31	% Change 06-31
Broxbourne	6,535	4,795	-1,740	-27%
Dacorum	7,074	4,817	-2,257	-32%
Hertsmere	4,752	3,569	-1,183	-25%
St Albans	4,693	3,292	-1,401	-30%
Three Rivers	3,778	3,485	-293	-8%
Watford	6,529	5,408	-1,120	-17%
Welwyn Hatfield	6,160	4,511	-1,649	-27%
Hertfordshire London Arc	39,521	29,877	-9,643	-24%

Source Oxford Economics and RTP

Warehousing jobs in the Hertfordshire London Arc fall fractionally by 1,300 jobs; 3%. Across the districts, the pattern of warehousing employment change shows small gains offset by larger losses. St Albans shows the largest loss of 1,400 jobs (25%) and Watford the second largest loss of 750 jobs (16%). In all other districts, change is in both directions, but insignificant, well under 600 jobs and less than 11%.

Table 3 Warehousing Jobs, 2006-31, Hertfordshire London Arc

Jobs	2,006	2,031	Change 06-31	% Change 06-31
Broxbourne	4,020	4,142	122	3%
Dacorum	8,235	7,910	-325	-4%
Hertsmere	4,733	5,267	534	11%
St Albans	5,709	4,310	-1,399	-25%
Three Rivers	3,305	3,202	-104	-3%
Watford	4,675	3,923	-752	-16%
Welwyn Hatfield	10,553	11,143	590	6%
Hertfordshire London Arc	41,229	39,897	-1,333	-3%

Source Oxford Economics and RTP

Office jobs from 2006-31 in the Hertfordshire London Arc increase by 40,900 (50%). In absolute and proportional terms, the largest gains are in the key centres for development and change: the increase in Dacorum of 12,400 jobs (86%) is followed some distance behind by Welwyn Hatfield, 7,800 jobs (67%) and Watford, 7,300 jobs (56%). Hertsmere gains 5,600 office jobs and the remaining districts around 3,000 jobs each.

Table 4 Office Jobs, 2006-31, Hertfordshire London Arc

Office	2,006	2,031	Change 06-31	% Change 06-31
Broxbourne	5,914	8,751	2,838	48%
Dacorum	14,454	26,826	12,372	86%
Hertsmere	10,483	16,010	5,527	53%
St Albans	19,503	22,391	2,888	15%
Three Rivers	7,615	9,910	2,295	30%
Watford	12,976	20,250	7,274	56%
Welwyn Hatfield	11,517	19,243	7,725	67%
Hertfordshire London Arc	82,462	123,381	40,918	50%

Source Oxford Economic and RTP

The Demand for Employment Space

To translate the forecasts into floorspace requirements we apply the same floorspace per worker ratio as mentioned in Chapter 7 of the report.

Industry & Warehousing

Scenario A

Table 5 Industrial and Warehousing Demand, 2006-31, Hertfordshire London Arc.

Net Floorspace Change sq m	Industrial Sq m	Warehousing Sq m	I & W Sq m
Broxbourne	-55,685	6,737	-48,948
Dacorum	-72,228	-17,868	-90,096
Hertsmere	-37,860	29,389	-8,470
St Albans	-44,819	-76,955	-121,775
Three Rivers	-9,388	-5,694	-15,082
Watford	-35,847	-41,363	-77,210
Welwyn Hatfield	-52,763	32,465	-20,298
Herts London Arc	-308,590	-73,289	-381,879

Source Oxford Economic and RTP

Scenario A shows a loss of 381,900 sq m of industrial and warehousing space, in the Hertfordshire London Arc much of which is industrial. Amongst the districts, St Albans and Dacorum show the largest industrial and warehouse losses; 121,800 sq m and 90,100 sq m respectively. All other districts show losses of less than 78,000 sq m.

Scenario B

Table 6 Industrial and Warehousing Demand, 2006-31, Hertfordshire London Arc

Net Floorspace Change	Industrial	Warehousing	I & W
	Sq m	Sq m	Sq m
Broxbourne	-55,685	68,874	13,189
Dacorum	-72,228	100,781	28,553
Hertsmere	-37,860	108,397	70,537
St Albans	-44,819	-12,308	-57,128
Three Rivers	-9,388	42,331	32,943
Watford	-35,847	17,483	-18,363
Welwyn Hatfield	-52,763	199,608	146,845
Herts London Arc	-308,590	525,165	216,575

Source Oxford Economics & RTP

In contrast in Scenario B, the total demand for industrial and warehousing space is positive, 216,600 sq m, the result of industrial losses offset by warehousing gains.

In comparison to other districts, Welwyn Hatfield shows the largest increase in industrial and warehouse space. The district's industrial losses are much the same as its neighbours but its gain in Warehouse space, 199,700 is twice as high as any other districts.

Office

Table 7 Office Demand, 2006-31, Hertfordshire London Arc

Net Change	sq m
Broxbourne	51,079
Dacorum	222,701
Hertsmere	99,478
St Albans	51,978
Three Rivers	41,309
Watford	130,930
Welwyn Hatfield	139,056
Herts London Arc	736,531

Source Oxford Economics & RTP

For offices the Hertfordshire London Arc total floorspace demand increases by 736,500 sq m. As discussed earlier, the largest increases are in districts with KCDCs: the increase is Dacorum of 222,700 sq m is followed some way behind by Welwyn Hatfield and Watford with 139,100 sq m and 130,900 sq m respectively. All other districts show floorspace gains of less than 100,000 sq m.

APPENDIX SIX

Workshop Notes

STAKEHOLDER EVENT

On 9TH May 2008, a stakeholder event was held at Dacorum Borough Council offices, Hemel Hempstead. This was a half day event and was attended by around 30 people including commercial property agents, developers, County Council officers, regional planners and officers from adjoining districts.

First the consultant team presented their draft findings. Then the group split into two small workshops to discuss industrial, warehouse and office development and also to discuss some specific large sites.

The feedback from this event has informed all sections of the report. The notes, taken and written up by Council officers, are provided below.

HERTFORDSHIRE LONDON ARC EMPLOYMENT WORKSHOP

*Dacorum Borough Council
9th May 2008*

POINTS RAISED FOLLOWING CRISTINA HOWICK'S PRESENTATION:

- Christina Howick (CH) raised the question to the audience regarding the reasons why employment in the London Arc was slowing. There was no direct response. And no-one wished to comment on the issue of the 50k versus 30k growth dilemma.
- Chris Pichon (Wenta) said that there were no surprises in the results showing a lack of economic development in the area. There are a number of small employment sites being lost to housing. He put this down to the fact that existing small-scale employment sites were becoming run-down and unattractive for redevelopment for employment uses. He stressed the need for refurbishing these sites to make them attractive. He also highlighted the fact that new and attractive sites were being created in Milton Keynes, Slough and Peterborough.
- Although he said work was needed to make our sites more attractive there was no real guidance as to how this could be achieved. Was pleased that there was (a long overdue) realisation by Councils of the need to put in more effort to securing and keeping jobs.

POINTS RAISED FOLLOWING ROB HARRIS' PRESENTATION:

INDUSTRIAL:

- Roz Ward (LB Barnet) highlighted that many London boroughs are concerned by their economic situation and look to our authorities as areas where economic prosperity is high. She questioned Rob Harris' comments about the proximity to London being an issue – as many London Boroughs consider our location to be advantageous. RH clarified that his comments related to the London Arc's proximity to central London, rather than the more peripheral Boroughs. RW raised the issue of job losses in North London. RH suggested that congestion was the reason for the recent decline and that the London Arc was better served by roads and has greater land available than Barnet etc.
- Claire Madden (Lambert Smith Hampton) suggested that there is definitely an interest in employment land in the area, but there is a shortage of sites. This shortage is exacerbated by the impact of the Buncefield explosion and consequent sterilisation of some sites for some types of development. Concerns over the rates being proposed on empty industrial buildings.
- There will be less speculative development in the future due to developers having to pay business rents on empty buildings.
- The current rents are considered reasonable.

- The study needs to be clear what is meant by 'small' units. It usually refers to <5,000sqft, but she considers <100,000sqft to be small.
- The demand for small versus large unit goes in cycles due to market demand and provision and is therefore very difficult to predict over a 15yr+ period.
- Mark Silverman (Hertsmere BC) stated that the Green Belt was problematic in bringing forward additional sites. There is known to be demand – but sites are constrained by national planning policy.
- Simon Arbon (Brazier Harris) – Concerned that bidders for employment uses were increasingly outbid by housing developers when purchasing land. This doesn't indicate a lack of interest from commercial developers. Planners need to strengthen policies that protect existing employment land. If land is released from current employment designations it should be brought forward for mixed use.
- Claire (LSH) – Highlighted the Hatfield Business Park as a good example of mixed-use development.
- Laura Wood (Dacorum) – Highlighted the importance of providing adequate housing and employment land and ensuring a balance is struck between the provision of jobs and homes.
- Mathew Hill (Carter Jonas) – Highlighted the potential of employment growth as a result of Luton Airport expansion. There are likely to be knock-on opportunities for business that should be explored. RTP agreed to pick this up in their report.

Summary:

- Concerns about the availability of land for employment uses. The message was there is a demand for space but there is not enough space.
- Concerns centred on LPAs for not (a) providing enough land and (b) maintaining the current stock for employment use. Examples were raised on some designated sites being lost to housing. House builders were outbidding prospective 'employment' developers for the land and subsequently putting in a mixed use scheme (predominately housing).

OFFICES:

- The Arc does not present itself well (marketing) like other areas, particularly West London.
- Claire Madden (LSH) – Highlighted that it is hard to promote the benefits of the area when developers are only allowed low parking figures. This is a key issue, as big employers will not consider the location if they cannot get their employees to the area easily. Added to this is that big companies have 'Green' initiatives in place and are now keen to become more sustainable which makes access by public transport very important. Significant investment in a co-ordinated public transport system is needed.
- Congestion is a significant issue. This adds to unattractiveness of the area for investors.
- Reference made to a figure of 1 parking space per 300 employees being insufficient.
- Mark Silverman (Hertsmere BC) – Not sure where this parking requirement stems from. It is not a set standard.
- Chris Pichon (Wenta) – Some developers have walked away from schemes because of car parking restrictions. They have considered the proposals as not viable. Mathew Hill (Carter Jonas) agreed.

- James Doe (Dacorum) highlighted that central government have a role to play in facilitating large scale transportation initiatives.

WAREHOUSE WORKSHOP:

Q1 – Is there a future for warehouses?

- There was some overarching concern with the lack of available sites in the area. This was supplemented with many sites falling into disrepair and as a result being unattractive to prospective purchasers. This then resulted in an erosion of employment land.
- On the other hand one person felt that policies should be more flexible and if there was no demand for the designated use then other viable uses should be considered.
- There was concern with employment land going to quasi-employment uses – hotels.
- There appeared to be a lack of ‘second phase sites’ that would be attractive to smaller and dirty uses. An example given was trade.
- People felt that if new green belt sites were provided then the older employment sites would probably be lost.
- Again management of sites came out as an issue, as did traffic.
- There was concern about the lack of small to medium sheds.

Q2 – individual sites

Comments were restricted to a couple of the listed sites.

Maylands

- There is demand for small industrial units at the moment.
- There is a great deal of Storage space available.
- Should remain the main B1 designation for the town.
- Concern about the viability of the Spencers Park (STA) site. Cannot just designate the site for this use there needs to be some momentum through a single big investor. There is poor access to airports/Universities that limit its attractiveness.
- Not too much concern about locating B uses and residential together.
- Access and transportation is a big issue but there is a chicken and egg type scenario as big companies are unlikely to invest without improved transportation/access but the usual mechanism of securing this is through S106. Perhaps there needs to be a partnership to improve the situation (Herts CC, EEDA, English Partnerships, Dacorum).

Leavesden

- Need Infrastructure/services to support schemes. Argument against isolated sites with poor access and limited ancillary services.
- The movie production industry has kept the area moving along.

Park Plaza

- It is surprising that the site has not been taken up and there are limited prospects for

the site.

Clarendon Road

- A great deal of space has been taken up in the last 12 months. There is not much grade A land left. Older 'stuff' remaining. The railway is a key selling point.

Hertfordshire London Arc Employment Study Consultation Event

Notes from 'Office' Workshop

Q1 – Is there a future for (big) offices?

Problems currently faced include:

- Rent levels are not high enough in the area to justify initial building costs (the issue of why there are relatively low rents in a tight market is unclear)
- Land prices, finance costs and development costs are all increasing leading to problems in affordability for potential investors / occupiers.
- Offices can't compete with residential land values
- Lack of Grade 'A' stock – HQ buildings are needed, but won't be built speculatively due to the costs associated with empty space.
- A 'brave' speculative developer may help kick-start the market
- Pre-lets may trigger other lets
- The need for 'amenity' (as provided by the competing markets of Milton Keynes and in the Thames Valley)
 - promotion / marketing of the area
 - hotel / conference facilities
 - local shops / services
 - good transport

Marketing is perceived as poor and confusing to companies (this is not helped by our peripheral location on the west of the Eastern Region).

Q2 – How can we make the London Arc more attractive?

Need to address all of the issues set out above.

Employment areas need to become 'Business Parks' (such as those in Milton Keynes)

Safety / security issues need to be addressed – particularly if we are expecting people to wait at bus stops after dark in winter.

Feedback on Sites

MAYLANDS

- Lots of opportunities to improve the area will be business-led
- The Gateway area needs a mixed-use approach (like Hatfield Business park)
- Access and congestion issues need to be resolved
- Local facilities – including ‘sandwich stops’ need to be provided.
- The area could easily accommodate two new hotels to support the business community.
- The areas image is very important to its success – but is currently very poor.
- The Buncefield explosion has not helped with the perception of the area within the business community.
- The area does have many positives – particularly the availability of attractive land at the Gateway.
- Tackling the area’s image is key to attracting speculative development.
- Location of train station within the town makes accessibility by public transport difficult.
- Park and Ride / regular bus services should be provided.
- Area considered to have long term potential.

LEAVESDEN

- Poor public transport and insufficient parking have contributed to the lack of uptake.

SANDOWN ROAD

- Rents are an issues – it is important to have a range of rents / units to meet varying needs.
- The study needs to be clear what is meant by ‘small units’ as definitions vary.
- There is a need for local authority subsidy of smaller start up / entry level units, as these are important to the success of the area, but not attractive to the commercial providers.

WELWYN GARDEN CITY

- Some successes, but driven by Tesco.
- The A1 is a less attractive locational corridor than the M1.
- On the one part of the employment area that has been allocated for a mix of uses including housing, employment, leisure and rail-related uses (Broadwater Road West), the majority of interest has been for redevelopment for housing.

CENTENNIAL PARK

- Noted as primarily an industrial rather than office location.
- Almost complete – but has taken 10 years to build out since phase 1 was constructed.
- Experienced high initial development costs.
- Provision of a hotel has been key to its success.

Additional General Points:

- Lack of skills (due to high levels of commuting into London) highlighted as a significant problem.
- Need to sell the area as a highly skilled area (which it is), with good opportunities for a healthy work/life balance.
- Good marketing is crucial to the area's success.
- How should the issue of 'spaceless growth' be considered within the study? Working from home does not necessarily mean that an individual will not have a desk in an office. Increasing move towards 'hot desking.' Open plan layouts are conducive to hot-desk layouts.
- Loss of older commercial buildings (i.e. Kodak) is not always bad for business. It can be a good way of recycling buildings that have come to the end of their office life (due to poor layout, insufficient floor-to-ceiling heights etc).
- Mixed use is a good concept to follow – but the mix of uses needs to be carefully considered. Good quality offices are often hard to accommodate successfully. Need to consider ongoing management issues. A mix of uses in separate buildings often works better than mixed uses in the same building.

RTP - Herts/London Arc Employment Land Study.

Agents Consultation Workshop - Hemel Hempstead - 9/5/08

Summary Feedback - Workshop B - Strategic Warehousing/Industrial – need/supply

Constraints/Key Sites

The need for B8 Large Sheds stems mostly from the changing industrial climate whereby our economy has changed from producing many goods at home to importing goods from China & the Far East.

The logistics industry wants to be locating Just in Time sheds close to markets like London & SE and increasingly goods are coming in to East Coast Ports like the recently enlarged Felixstowe and soon to be enlarged Harwich to supply here.

Key sites for this business are likely to be close to Motorway/A Road with good links to the East & South.

Some evidence that Herts/London Arc locations have been overlooked due to cheaper big sheds just up the road in MK/Daventy/SMids, nearer A14 – E.Coast Ports route.

Not mentioned til last by participants is the proposed 3.5million sq ft floor space that would be created by HelioSlough at the **Radlett Rail Freight Terminal** subject to Public Inquiry Outcome due in October. More sustainable to use rail?

St Albans other employment spaces not ideal for big sheds/industrial being located off main routes.

Broxbourne's **Park Plaza** M25/A10 ought to be more attractive to this industry, but at present is sole tenanted by News International. Co-op owned land here may be too pricey.

Hertsmere - **Centennial Park and Elstree Way** not of great interest for strategic sheds/industry but there is interest for Hotels.

Watford - **Odhams/Residential/Sandown** constrained by local roads and interest being shown for Resi rather than B8. (Clarendon Rd - Good offices let - Poor not)

Three Rivers - extant planning permission at **Leavesden** for Phase 2 mixed use development of over 1million sq ft but is subject to S106. £7M for improved road

access and buses etc.

Dacorum – **Maylands/Three Cherry Trees** good for M1 but car parking 1:1000sqft and no regular bus/tram are constraining factors. Plus Buncefield factor - People Building slow to let too even with parking at 1: 300sq ft.

WelHat – **Hatfield Business Park & City** – good prospects but more for hi tech and local churn etc.

XXXXXXXXXXXXXX

Policy concern for Herts/London Arc local authorities is how/whether to seek balance of Homes & Jobs (easier for ex New Towns – Hemel, WelHat?) or relinquish to residential and dormitory towns.

Three Rivers and other Herts local authorities may welcome a possible 60-80% drop in Job growth prediction from this study as it will need to use less Green Belt for 4000 homes 7000 Jobs to 2021. (No significant Brownfield left)

Lots of employment space not fit for purpose and needs modernising and some lost – Frogmoor (St Albans) Met. Station & Shakespeare Ind Est (Watford) cited as examples.

Still need spaces for Dirty/Noisy Jobs – Repairs/Paint Spray, Recycling, Scaffolding & Skips etc. Dacorum et al recognise & try to plan for this.

Most Mixed Use/ B1b, c sites can situated next to housing with appropriate conditions now.

Of St Albans' 8 areas for growth, 2/3 identified suitable for mixed use

Need for **Marketing** to compete with West London – Thames Valley corridor.