

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

HERTFORDSHIRE LONDON ARC JOBS GROWTH AND EMPLOYMENT LAND



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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 devlpt/redvlpt | 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 | LAND OPPOSITE 5-7 BURROWFIELDS | | | B1a | 333 | B1 | 113 | Not started |
| Welwyn Hatfield | 23 BURROWFIELD | | | B1 | 556 | | | Not started |
| Welwyn Hatfield | JOHN DOYLES HOUSE, LITTLE BURROW, WGC | | | B Mix | 4102 | B8 | 185 | Not started |
| Welwyn Hatfield | 6 LITTLE BURROW, BURROWFIELDS, WGC | | | B2 | 74 | | | Not started |
| Welwyn Hatfield | 160 GREAT NORTH ROAD, HATFIELD | | | B1 | 512 | B2 | 211 | In Progress |
| Welwyn Hatfield | 164 GREAT NORTH ROAD, HATFIELD | | | | | B2 | 68 | Not started |
| 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 | 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 | B1a | 298 | Detailed permission not started |
| St Albans | 63 High Street | | Colney Street | B1a | B8 | 141 | Detailed permission not started |
| St Albans | Ridgmont Road | | Harpenden | B1a | 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 | 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 | B8 | 333 | Detailed permission not started |
| Broxbourne | Britannia Road and Lea Road | | Hemel Hempstead | B8 | | 14800 | Estimated site |
| Broxbourne | 1 | | Waltham Cross | | | 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.