



Hertfordshire Key Employment Sites

Strategy & Action Plan

24 March 2020

Prepared for
**Hertfordshire LEP, Hertfordshire County Council and Hertfordshire
Infrastructure and Planning Partnership**



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Hertfordshire LEP, Hertfordshire County Council and Hertfordshire Infrastructure and Planning Partnership

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Contents

EXECUTIVE SUMMARY4

1. INTRODUCTION9

2. CONTEXT AND POLICY13

3. FUTURE DEMAND & EMPLOYMENT TRENDS39

4. STRATEGY & ACTION PLAN57

5. CONCLUSION77

Tables

Table 1.1 Employment Land Use Categories.....9

Table 2.1 Local Employment Studies Key points.....19

Table 2.2 Key Sites Size and Job Change Summary35

Table 3.1 Employment Growth in Herts Top 10 Sectors40

Table 3.2 Employment Trends by District.....42

Table 3.3 Net Change in Office Supply45

Table 3.4 Potential Future Office Demand49

Table 3.5 Employment Scale and Significance by Key Employment Site52

Table 3.6 Strategic Sectors and Key Employment Sites.....53

Table 3.7 Implications from demand assessment.....56

Table 4.1 Employment Site Typologies.....59

Table 4.2 Potential key sites interventions.....60

Table 4.3 Additional ‘Pro-active’ measures61

Table 4.4 Key employment sites, typology and possible interventions72

Table 4.5 Action plan: short term interventions (6 – 12 months).....74

Table 4.6 Action Plan: Longer term interventions (12 – 24 months)75

Table 4.7 Established/emerging strategies and relationship with Action Plan.....76

Figures

Figure 2.1 A414 Corridor Strategy Location

Figure 2.2 Selected Key Employment Sites

Figure 2.3 Historic and Future Job changes 2014 to 2018 to 2036

Figure 2.4 BRES Data 2015 Base with Planning Data 2036 Jobs Estimates

Figure 2.5 Article 4 Direction Sites

Figure 3.1 Spatial Distribution of Employment

Figure 3.2 Floorspace Forecasts

Figure 3.3 Employment Concentrations and Key Employment Sites

Figure 3.4 Scale and significance of Employment by Key Employment Sites

Figure 3.5 Site Employment in Offices by Key Employment Site

Figure 3.6 GVA per Employee Across Key Employment Sites

Appendices

Appendix A - Future 'World of Work' Scenarios

Appendix B - Key Sites - potential interventions

Executive Summary

Background

This report for the Hertfordshire Local Enterprise Partnership (LEP), Hertfordshire Infrastructure and Planning Partnership (HIPP) and Hertfordshire County Council (HCC) provides an update on employment and Key (strategic) employment sites in Hertfordshire and suggests a Strategy and Action Plan to help achieve strategic economic outcomes.

The recent Lambert Smith Hampton (LSH) report on Loss of Employment Space in Hertfordshire has identified that Hertfordshire has lost some 7 million sq. ft. of commercial space (office and industrial) over the last 10 years, with the rate of loss doubling over the last five years. The reasons for this are complex, especially since underlying demand for commercial space is buoyant, but key factors are very strong residential values, loss of employment space to residential use through Permitted Development Rights (PDR), and social changes in the way we live and work.

As a County, Hertfordshire's response to loss of employment space should not be to try to replace what's been lost. In our view some of this employment space was probably outdated and in the wrong place. Equally, modern employment may well need less permanent employment space due to technology changes enabling home-working and share spaces/hot-desking. This is particularly true of office-based uses, although manufacturing is generally much less flexible in its space requirements. A clear distinction between the employment space we wish to protect and enhance and the space we can afford to lose needs to be made.

Despite this loss of floorspace, the Hertfordshire economy has continued to grow strongly, with 65,640 enterprises in 2019 – up from 46,800 in 2010 (40% growth); 665,000 jobs in 2018 – up from 538,000 in 2010 (25% growth); and £40.7bn in GVA in 2018 – up from £28.1bn in 2010 (45% growth) – these are all much higher than the relevant all-England growth figures. However, there are serious concerns regarding the ability to maintain this growth unless adequate employment space is provided.

Roles in protecting/enhancing key sites

In terms of organisational roles in the provision and protection of employment land:

- Protection/expansion of employment floorspace is led by local planning authorities through their respective Local Plans and development control,
- The LEP can help set economic strategy through work such as the Local Industrial Strategy (LIS),
- It can provide local authorities with guidance and other support for particular locations; and
- All local employment is important, but the LEP will need to target its investment in line with economic priorities.

The focus of the study is on B1 Office, B2 General Industrial and B8 Storage or distribution land uses. The study reviews various estimates and projections of employment space but

recognises that it is not within its remit to define future requirements, which is best left to the local employment studies by planning authorities.

Defining ‘key sites’

Defining a key employment site enables identification of those sites be regarded as high-level priorities at County level for strategic economic growth, and this enables a focus on strategic priorities for mitigation and strategy measures. However, this study recognises that:

- The focus of the key employment sites described below is largely on industrial and research-dominated locations which align closely with the emerging LIS and LEP strategic priorities.
- There are many other employment locations, and in particular town centres, that are very important to the Herts economy and may also need strategic attention and investment.
- The list of key sites should not be ‘set in stone’ – there will be cases where local authorities have other existing or emerging employment locations where a case can be made for appropriate strategic investment.

A broad definition of a key site has been developed; this includes the following characteristics:

- Regional, potentially national significance,
- Strategic economic sectors and clustering,
- Appropriate scale,
- High quality,
- Clear identity; and
- Highly accessible (road and rail).

Analysis of historic and future economic demand

The key conclusions drawn from the assessment of demand are as follows:

- The economic indicators suggest that Hertfordshire is home to a healthy, growing economy.
- Significant loss of employment land has been experienced (particularly office accommodation) and the forecasts suggest that this will continue in the short term. This is likely to place a significant constraint on economic growth.
- A strategic decision about the future ambition for and role of the Hertfordshire economy must be made in order to determine how assets such as employment land are managed in order to support this.
- The most ambitious scenario from the Local Industrial Strategy (LIS) consultation is undeliverable without a determined approach to not only retain but also develop additional employment land in Hertfordshire, particularly office and industrial accommodation given the current and potential future strengths of the economy.
- The 17 key employment sites identified differ in the strategic role and the opportunity they present to support future growth strategies.

- The review of these 17 sites should not constrain thinking around the key locations for employment and economic activity across the County.
- Other locations such as town centres should also be considered as important employment sites (in the sense of being economic hubs) and whilst ‘bricks and mortar’ retail is likely to continue to face pressures, opportunities to increase the density of economic activity in town centres should be considered as part of a forward strategy.
- The data suggests that 8 out of the 10 districts in Hertfordshire are facing a challenge to supply sufficient office space to accommodate the growth planned or predicted in key planning documents.

Strategy and Action Plan

The study recognises that there have been many successes in enhancing key sites over the last decade:

- The creation of the Stevenage Bioscience Catalyst (SBC).
- Development of a new bridge and modern link road to the Hoddesdon Business Park to remove an existing bottleneck and improve access for larger vehicles, cyclists and pedestrians.
- The creation of the multi-site Hertfordshire EnviroTech Enterprise Zone (now part of the Herts Innovation Quarter (HIQ)).

Opportunities currently being considered include:

- The development of proposals to upgrade M1 Junction 8 to support both the delivery of a range of employment sites within the HIQ and in the adjoining Maylands Business Park.
- The A414 Corridor Strategy – an approved plan including 30 packages of proposals designed to improve transport links across the County which will improve access to a range of employment locations and open up new opportunities.
- A potential new station at Park Plaza Broxbourne to serve major new employment locations nearby.

Developing a typology of sites to aid strategy/action plan

There are many ways Hertfordshire’s employment sites can be defined, but this Plan considers that there are three principal characteristics:

- Where they sit on the ‘build out spectrum’ – are they allocated but not yet developed (or not significantly so?); are they only partially developed, with significant investment opportunities; or are they substantially or wholly built out, with new businesses only able to take up occupancy if another moves out?
- Their overall size – small medium or large?
- What opportunities do they offer? Can they be enlarged or merged with adjoining activities to achieve a greater economy of scale; can access be upgraded, or are there significant passenger transport initiatives being planned which they would greatly benefit from?

Potential interventions

We have identified the following interventions that could be pursued:

- Masterplanning/capacity studies on emerging sites, and those capable of expansion.
- Densification/placemaking to improve the offer on established sites.
- Promotion of sectorisation and clustering where this is not strong.
- Creating a strong Identity/promoting marketability.
- Improved accessibility especially for non-car modes.
- Providing Bluegreen¹ infrastructure.
- Promoting knowledge exchange/networking e.g. through innovation centres; and
- Plug into the zeitgeist – full fibre/5G/Artificial Intelligence (AI)/green jobs.

More proactive innovations could include:

- Land Assembly/CPO,
- Development Corporation or public/private partnership (public/private),
- New funding models: pooling/directing strategic public funds (Strategic CIL or Infrastructure Tariff); and
- New funding models: harnessing increase in land value (Land Value Capture/DRM/TIF).

The study briefly reviews the key sites identified and suggests how these interventions might be used in each; this will need to be the subject of a multiagency future approach to define the appropriate interventions and priorities.

The recommendation is for this report to be consulted on with the districts and other stakeholders, with a view to confirming the broad strategy and agreeing a more detailed action plan for future interventions.

Economic Impact of the Coronavirus pandemic (COVID-19)

At the time of drafting this report (late March 2020) the world was starting to experience in earnest the major health, social and economic consequences – many of them tragic - associated with a global pandemic, with many countries (including the UK) entering into a lockdown of an unknown duration. There are major uncertainties as to how far the virus will spread and for how long it will endure, and what the long term consequences will be; it would clearly be inappropriate for us to speculate on this, and we have not attempted to.

It seems to us highly likely there will be substantial negative economic consequences arising from COVID – 19, which could also result in a short to medium term reduction in demand for employment space. For example, home working is now the (temporary) national and

¹ A network providing the “ingredients” for solving urban and climatic challenges by building with nature. Main components typically include stormwater management, climate adaptation, less heat stress, more biodiversity, food production, better air quality, sustainable energy production, clean water and healthy soils, and better recreational facilities.

international norm, and this may have far-reaching implications for the future demand of certain types of employment space.

However, we also believe that post the crisis the demand for employment space will continue to increase. Indeed the promotion and improvement of Hertfordshire's key employment sites in order to increase their scope and attractiveness to new business investment, and to retain and boost current activities, becomes even more critical in circumstances where there has been an economic downturn than when compared to those conditions prevalent when we researched our report (i.e. a period of sustained - if modest – growth).

The important thing, we think, will be to:

- Protect and promote Key Employment Sites (and of course other employment spaces), guarding against their vulnerability through the potentially difficult months – if not years – to come.
- Ensure that the Key Sites play a significant role in the challenges that the Hertfordshire economy, which like all economies, will face in developing much stronger economic resilience and responsiveness to major change.
- Enable such sites to be in the vanguard of comprehensive measures to promote post pandemic economic recovery.

1. Introduction

1.1 Context

1.1.1 This report contributes to the evidence base that Hertfordshire Local Enterprise Partnership (LEP), Hertfordshire Infrastructure and Planning Partnership (HIPP) and Hertfordshire County Council (HCC) have on the current designated employment land in the County.

1.1.2 This report contains:

- A review of planning policy and studies relating to employment in the County.
- An analysis of employment sites.
- A commentary on various estimates of forecast demand for employment land supply and requirements in the future.
- A strategy and action plan.

1.1.3 The study was commissioned in response to the recent (February 2019) Lambert Smith Hampton (LSH) report ‘Loss of Employment Space in Hertfordshire’, which identified that Hertfordshire has lost some 7 m sq.ft. of commercial space (office and industrial) over the last 10 years, with the rate of loss doubling over the last five years. The reasons for this are complex, especially since underlying demand for commercial space is buoyant. The key factors for this include strong residential values, loss of employment space to residential use through PDR, and social changes in the way we live and work.

1.1.4 The study concluded that this rate of loss would have several important implications for the local economy, including constraining growth, forcing relocations, reinforcing home working, limiting productivity and performance and restricting achievement of Strategic Economic Plan objectives. It suggested various solutions, many of which are discussed in this report.

Employment Land Definition

1.1.5 This report focuses on commercial and industrial land use classes B1(a,b,c), B2 and B8, shown in **Table 1.1**. Not included are education, retail, leisure and health use.

Table 1.1 Employment Land Use Categories

Use Class	Description
B1: Business B1(a) B1(b) B1(c)	Offices – except those already mentioned within Class A2 Premises for Research and Development Industrial processes which “can” take place within a residential area without damaging the “amenity of that area”
B2: General Industrial	General Industrial Use for the use of carrying on an industrial process other than one falling within class B1
B8 Storage or distribution	Land used for storage of distribution, includes warehouses and open-air storage

1.2 The Role of the LEP

- 1.2.1 The response to loss of employment space should not necessarily be to try to replace what has been lost, as some of this loss was planned, while it is highly likely that much of the rest was outdated and/or in the wrong place. Equally, modern employment may well need less permanent employment space due to technology changes enabling home-working and shared spaces and hot-desking. This is particularly true of office-based uses although manufacturing is generally much less flexible in its space requirements. It is important to be clear about the employment space that should be protected and enhanced and the space that can be lost.
- 1.2.2 Local Planning Authorities (LPAs) in the county have allocated new employment areas in Local Plans. The LEP believes it is important to understand the best way to safeguard this space for the future as sites come forward, especially where they are in sustainable locations and suitable for business purposes. Similarly, most LPAs have designated Article 4 Direction areas.
- 1.2.3 While the private sector can afford, and is best placed, to replace lost commercial space at the scale against which it has been lost in the county, they will only do so if rents/values are sufficient to make it commercially worthwhile. Whilst residential rents/values are high there will continue to be pressure on poorer quality commercial space.
- 1.2.4 Public sector bodies such as the LEP and local authorities, or quasi-public bodies such as enterprise agencies, can intervene through lobbying and facilitation, but the level of investment they can provide is relatively small. This suggests that public agencies need to be focused on key sectors or business types and sizes, on supporting infrastructure (e.g. connectivity, transport, modal shift to reflect life/working practices), and on areas of market failure. For instance, this may be developing and managing certain types of new floorspace that might not be attractive to the private sector, but which may be important to support the future economy, such as incubation, start-up and grow-on space.
- 1.2.5 The LEP Strategic Economic Plan (SEP) and Emerging Local Industrial Strategy (LIS) will identify the business sectors that are likely to be most valid for Hertfordshire to retain and attract into the future. It is essential that these documents, among other strategic documents in the county, inform what volume of land and premises will be needed to accommodate priority business sectors.

1.3 Engagement with Districts and Councils

- 1.3.1 Engagement took place with the councils to obtain their planning data regarding employment sites to gain an understanding of their nature and spatial characteristics.
- 1.3.2 In addition, a workshop was also held on 12th November 2019, and various district heads of planning attended. Presentations were made outlining the scope of the study and the progress made in data collection and analysis. Concluding the workshop, a question and answer session was held to identify any missing information sources or issues/suggestions that the districts had regarding the project.

1.3.3 Discussion was wide-ranging, but some key points raised were:

- Keep smaller sites in focus, authorities value these when combined as much as the larger more prominent sites.
- The relationship between sites is important, with some taking capacity from others, (e.g. Baldock and Stevenage linkages).
- Cross-border and boundary relations between Herts and surrounding authorities is important to future-proofing sites (e.g. impact of Stansted Airport etc),
- In the short-term the need for office space and town centre employment should be viewed as important, rather than focusing purely on the future and new tech and work practices.
- Sustainability should be prioritised.
- Radical ideas for measures should be included to showcase what is possible.

1.4 Economic impact of the Coronavirus pandemic (COVID-19)

1.4.1 At the time of us drafting this report (late March 2020) the world was starting to experience in earnest the major health, social and economic consequences – many of them tragic - associated with a global pandemic, with many countries (including the UK) entering into a lockdown of an unknown duration.

1.4.2 As we write there are major uncertainties as to how far the virus will spread and for how long it will endure, and what the long term consequences will be; it would clearly be inappropriate for us to speculate on this, and we have not attempted to.

1.4.3 It is categorically the case, however, that there will be substantial negative economic consequences arising from COVID – 19, and we know this because these are already being felt, locally, nationally and internationally. We feel it is important for us not to ignore this very important context for the way in which this report is received.

1.4.4 There is an obvious danger of our conclusions being viewed as immediately anachronistic, given the research and analysis that we have undertaken took place in circumstances which might be viewed as barely relevant going forward.

1.4.5 We do not feel this to be the case, however, for two reasons.

1.4.6 Firstly, In the short to medium term, a reduction in demand for employment space seems inevitable. This could range anywhere from a minor to a major reduction in demand; and this reduction could be sustained for a comparatively short to a very long while, and it is entirely possible that demand may not recover to pre COVID – 19 levels. In reality, we just do not know, and may not know for a considerable period of time.

1.4.7 This does not negate the need for the measures we identify to promote Hertfordshire's Key Sites – the potential interventions we identify in the Strategy and Action Plan, indeed quite the reverse. The promotion of sites through a series of bespoke interventions for a significant number of the county's premier business locations in order to increase their scope and attractiveness to new business investment, and to retain and boost current activities becomes even more critical in circumstances where there has been an economic downturn

than when compared to those conditions prevalent when we researched our report (i.e. a period of sustained - if modest – growth).

- 1.4.8 The second reason is more complex. Part of the fight against the spread of COVID – 19 has been the imperative to promote social isolation by limiting the congregation of people, which in turn means discouraging and even preventing many people from both travelling to work and working in an environment surrounded by/interacting with other people. At the time of writing it appears that only workers engaged in a very limited number of professions – healthcare staff, food production/distribution - are not proscribed from such activities.
- 1.4.9 Aside from the economic consequences of this – many firms and workers will not be able to operate in such challenging circumstances – many more are having to find new ways of working, which for the most part will mean staff working from home. It is to be expected that some firms and some workers will find it easier than others.
- 1.4.10 When the COVID – 19 crisis eventually abates many will go back to previous working practices but it can perhaps be expected that a number will not – some will find that the traditional need for a 9 – 5/5 days a week ‘physical presence’ in an office, factory or other workspace is no longer an advantage – indeed quite the opposite – because they have been able to adapt.
- 1.4.11 When we addressed in our report in Appendix B the issue of the ‘Charging World of Work’ – 3 radically different scenarios for how we conduct our business in the future - we had absolutely no idea that one of these – ‘Big Changes in the World of Work’ – would effectively become a reality for most in a matter of days, not decades. Again, nothing is certain, but we will in time need to factor in the implications of at least some employers and employees realising that they may wish to do things differently in future, analyse what this might mean in terms of future employment space in Hertfordshire, and plan accordingly.

1.5 Report Content

- 1.5.1 The remainder of this report is structured as follows:
- Section 2 of this report discussed the context and relevant policy.
 - Section 3 describes future demand and employment trends.
 - Section 4 outlines the recommended strategy and action plan.
 - Section 5 is the conclusion outlining suggested next steps.

2. Context and Policy

2.1 Planning Policy

2.1.1 The latest National Planning Policy Framework (NPPF) was published on 19 February 2019. The NPPF sets out Government planning policy, provides a framework within which local planning policies should be produced and is a material consideration in planning decisions. Among relevant sections are the two following statements.

2.1.2 Paragraph 8 states:

'To 'build a strong, responsive and competitive economy, by ensuring that sufficient land of the right types is available in the right places and at the right time to support growth, innovation and improved productivity; and by identifying and coordinating the provision of infrastructure'

2.1.3 Paragraph 60 states:

'Planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, considering both local business needs and wider opportunities for development'

Permitted Development Rights

2.1.4 These rights came into effect in May 2016. They permit the following land use changes:

- B1(a) offices to C3 residential use, subject to prior approval covering flooding, highways and transport issues and contamination.
- Premises in B1, C1, C2, C2(a) and D2 use classes can change use permanently to a state-funded school, subject to prior approval covering highways and transport impacts and noise; and
- Buildings with A1, A2, A3, A4, A5, B1, D1 and D2 uses will be permitted to change use for a single period of up to two years to A1, A2, A3 and B1 uses.

Article 4 Directions

2.1.5 An Article 4 Direction is made by a local planning authority restricting the scope of permitted development rights; these can relate to a particular area/site/type of development.

2.1.6 Article 4 Directions do not mean that planning consent would not be granted for applications of B class land use to residential C3; it simply means that an application has to be submitted so that the local planning authority can examine the proposal in detail. A plan showing Article 4 protections in Hertfordshire is provided later in this report.

Local Enterprise Partnership

2.1.7 The Herts Local Enterprise Partnership (LEP) vision is to “accelerate business led economic growth”. The revised Strategic Economic Plan for Hertfordshire, 2017-2030 outlines four priorities for the County, determined from consultations with various stakeholders and business leaders:

- **Priority 1:** Maintaining global excellence in science and technology
- **Priority 2:** Harnessing our relationships with London and elsewhere
- **Priority 3:** Reinvigorating our places for the 21st Century
- **Priority 4:** Foundations for growth

2.1.8 To meet the aspirations of the consultees, a Hertfordshire Enviro-Tech Enterprise Zone (EZ) has been created encompassing three Key Employment Sites (Maylands/East Hemel Hempstead, the BRE and Rothamsted). It is aimed to create 8,000 new jobs within the Zone. The EZ is considered flexible by the LEP in regard to occupiers.

2.1.9 As part of the economic strategy, 3 programme boards have been set up to deliver the following:

Enterprise and Innovation Board

- Ensure that business support is potentially available to Hertfordshire’s population of small and micro businesses,
- Ensure appropriate responses are developed to the challenges of access to finance, particularly for firms which are seeking to scale up and grow,
- Help to articulate better the skills imperatives linked to the key sectors identified in relation to Priority 1; and
- Ensure appropriate alignment with the White Paper that follows on from the Industrial Strategy Green Paper; and that Hertfordshire’s contribution is fully articulated.

Skills and Employment Board

- Work with employers and providers to ensure a good response to the introduction of the Apprenticeship Levy,
- Contribute as appropriate to the implementation and monitoring of key recommendations resulting from the Area Review process,
- Continue to develop the dialogue across Hertfordshire’s providers, learners and businesses,
- Continue to work with government to influence national provision and ensure that it maps onto Hertfordshire’s skills challenges,
- Develop pilot project concepts that help to address specific challenges in aligning skills provision with the strategic direction set out in Perfectly Placed for Business,
- Forge stronger links between schools and employers,
- Continue to work on higher level skills provision within Hertfordshire.

Strategic infrastructure Board

- Help to ensure that local provision is made for relatively low-cost business accommodation that is appropriate for the needs of SMEs.

2.1.10 Building on the economic strategy, the Draft Local Industrial Strategy (summarised later in this report) has been developed and has been consulted on, to meet government requirements and the 2017 White Paper regarding productivity and inclusive growth. The consultation aims to set out the key economic priorities for the people of Hertfordshire.

Key economic drivers outside the County

2.1.11 There are many important developments outside the County which could impact future economic growth, particularly in areas adjacent to or with very good connections to Hertfordshire settlements. Some of these include:

- The emerging hub for technology and science (including the Crick Institute) around Kings Cross station, which is very well connected by rail to many Hertfordshire settlements.
- Similarly, the continuing growth in and around Cambridge and along the Kings Cross-Cambridge rail corridor is very accessible to many Hertfordshire settlements.
- There are plans for growth at both Stansted and Luton airports.
- The Oxford/Cambridge Arc proposals are situated just to the north of Hertfordshire and there will be opportunities to link to and access developments here.

The 2012 Strategic Sites Study²

2.1.12 This study was undertaken against the background of a concern that Hertfordshire was losing its competitive edge, economic growth was slower than in other locations the County was in competition with, and that there had been a drift towards lower value activities; if confirmed, this could be addressed by a concerted focus in promoting a range of strategic employment locations.

2.1.13 In indeed confirming these impressions, the Study identified 16 strategic employment locations which it was felt could act as the focus of a strategy to address measures to promote investment and prosperity in the County; it is worth noting that 14 of these 16 still have a strong relevance today.

2.1.14 The Study concluded with a range of measures involving landowners and local authorities including the promotion of sites through the planning system and proactive interventions. It is encouraging to note that a wide range of actions to support the development of these locations has taken place, both through the planning system (e.g. Park Plaza North, Gilston) and through concerted actions by the LEP and its partners (Gunnels Wood Road Stevenage and the Herts Innovation Quarter, Hemel Hempstead).

² Hertfordshire Strategic Employment Sites Study: A Final Report by Regeneris Consulting (2012)

- 2.1.15 The 2012 Study was published before the effects of employment space loss started to be felt in earnest, so whilst its conclusions remain valid, a refresh of an interactive approach is perhaps needed, with perhaps a ratcheting up of the levels of positive intervention.

The LSH Study into Loss of Employment Land

- 2.1.16 As well as charting the trend in employment space loss the LSH study starts the process of considering actions to halt and potentially reverse the continuing leakage of valued economic investment opportunities. It also acknowledges the potential impact of the changing nature of the working environment, something which is considered. This study is described in more detail below.

Interrelationships with Other Studies and Strategies

- 2.1.17 Any strategy and action plan recommended by this report does not sit in a vacuum, and it is important to acknowledge that there are a range of parallel initiatives and actions which feed into the narrative around the promotion of employment space. These include the following:

Strategy/initiative	Comment
The emerging Hertfordshire Local Industrial Strategy	With its focus on promoting higher levels of productivity through targeted local actions the LIS – which also examines what the Hertfordshire economic landscape of the future could look like – has a critical relationship with both the opportunities and challenges of retaining and enhancing the County’s employment space
The Herts Growth Board Key Priorities	The Growth Board (now a formal partnership between the County Council, the 10 district councils and Herts LEP) seeks the alignment of the spatial, economic and infrastructure plans for Hertfordshire in order to safeguard and maintain Hertfordshire’s unique quality of life and prosperity; a key focus is the delivery of the Hertfordshire Infrastructure and Funding Prospectus (see below), acting as the voice of Hertfordshire to Government, co-ordinating joint strategic planning initiatives and cross border issues and – crucially for this current study – overseeing the development and delivery of the Local Industrial Strategy including the development of key employment sites
Hertfordshire Local Transport Plan (May 2018)	In setting out how safe and efficient travel can help deliver a positive future vision of Hertfordshire, the Plan recognises that it has a major input into wider policies such as economic growth, whilst also recognising that a less damaging and more balanced approach to future transport investment will see a greater focus on public transport, walking and cycling
Hertfordshire Infrastructure & Funding Prospectus (February 2019)	A snapshot review of infrastructure funding in Hertfordshire, the HIFP recognises the economic and environmental impact of decades of underinvestment and the need to inject at least £5.7bn of new investment by 2031 to remedy deficiencies and promote sustainable future growth. HIFP’s exploration of a range of innovative funding solutions are a pointer to initiatives that need to be explored in relation to the County’s employment sites

Strategy/initiative	Comment
Hertfordshire Joint Strategic Planning	Although all local plans consider the issues of employment floorspace in its wider context, the initiative to promote a joint strategic plan for the 5 Southwest Herts authorities will nurture opportunities to consider employment needs holistically – on a ‘right development in the right place’ basis, an approach that can also be considered within a similar initiative for the Northeast and Central part of the County

Relationship with climate change

2.1.18 No approach to the future of employment space can any longer ignore the imperatives to tackle the impacts of climate change, and an initiatives that are promoted need to consider not only the challenges – how to deliver sustainable solutions – but also the opportunities around the promotion of clean growth businesses. The promotion of clean growth businesses is supported in line with both the HCC and the Hertfordshire Growth Board responses to the LEP’s Local Industrial Strategy.

Changing Work Patterns and Impact on Employment Site Needs

2.1.19 In the 1950s the image best associated with the world of work would be industrial workers streaming out of the factory gates on the dot of 5.30 p.m. on their bikes.

2.1.20 That image looks a little quaint and completely archaic; in time, a representation of our current work practices will look similarly so, and it is likely to have consequences for how employment space responds to the needs of businesses. Quite how that will manifest itself is uncertain. Three potential scenarios are suggested below for the future world of work, possibly only one of which will come to pass.

2.1.21 Of course, employment is much more complex than these scenarios- there will always be some employment required that is more space intensive (some manufacturing, logistics, vehicle repairs, laundries etc.) and indeed in some of these activities such as logistics as demand for space of certain types has grown.

- 2.1.22 The three scenarios discussed in Appendix A are:
- ‘Big Changes in the World of Work’ – where Transformative technological changes coupled with societal shifts as new generations of workers demand changes in the working environment causes radical shifts in the business environment; hard employment floorspace needs are likely to be reduced, but equally, the environment in which people work changes significantly towards a better ‘offer’.
 - ‘The Ship Steadied’ - In time the loss of employment space is slowed and possibly reversed. There are national factors – losses, it turns out were part of a market adjustment and a recognition that there was simply too much employment space – much of it in the wrong location or of insufficient quality. With a smaller but leaner stock of sites and premises employment space planning can be conducted in a less fraught environment. Locally, Hertfordshire receives a boost as it fulfils its potential at the heart of the Golden Triangle, rather than acting as a facilitator of London’s growth

- ‘Managing a Graceful Decline’ - In essence this is a more extreme version of Scenario 1, with employment space caught fully in the pincers of cultural shifts in attitude to how work is conducted and the impact of AI on business capability.

2.1.23 These scenarios all have different potential implications for employment space, but of course cannot be depended on at present – what they do indicate is that to address current and indeed future issues, any strategy and action plan needs to be flexible, to understand changing market conditions and to adapt accordingly.

Celebrating successes and identifying opportunities

2.1.24 We have recognised that since the 2012 Strategic Sites work there are many successes to acknowledge, with a range of opportunities presenting themselves.

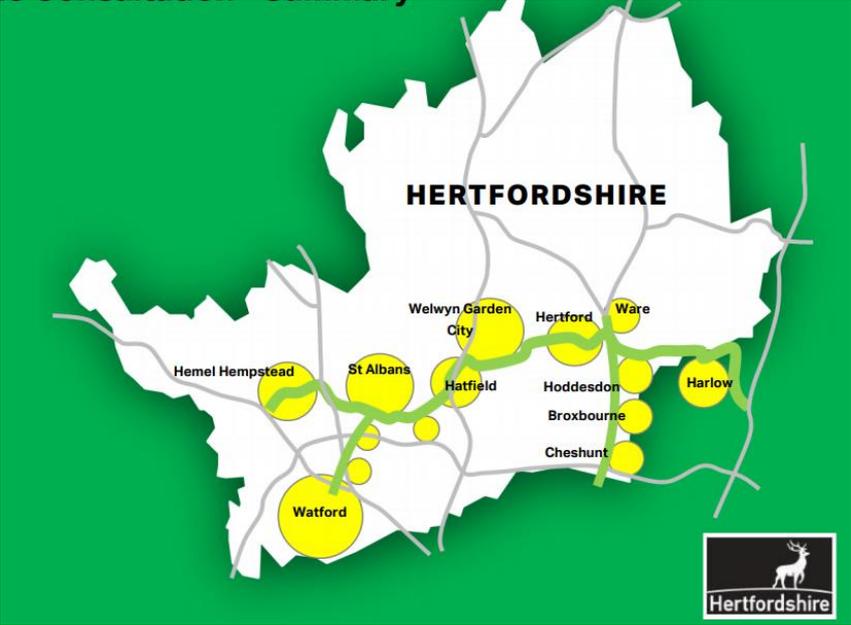
2.1.25 Successes include:

- The creation of the Stevenage Bioscience Catalyst (SBC) a globally significant site which is home to the over 40 research organisations, the largest cluster of cell and gene therapy companies in Europe. It houses the Cell and Gene Therapy Catapult Manufacturing Centre supporting companies ramping up their manufacturing capacity and is currently undergoing expansion to help support up to 12 cell and gene therapy companies,
- A new bridge and modern link road to the Hoddesdon Business Park to remove an existing bottleneck and improve access for larger vehicles, cyclists and pedestrians and with better links to the strategic highway network to provide this major employment sites’ economic potential; and
- The creation of the multi-site Hertfordshire EnviroTech Enterprise Zone (now part of the Herts Innovation Quarter (HIQ) which aims including the creation of an internationally recognised employment zone focusing on the emerging enviro-tech sector, and support for business start-up; attracting new overseas and UK investors and securing much needed expansion space for growing businesses.

2.1.26 Opportunities include:

- The development of proposals to upgrade M1 Junction 8 is a critical infrastructure improvement needed to support both the delivery of a range of employment sites within the HIQ and in the adjoining Maylands Business Park in Hemel Hempstead,
- The A414 Corridor Strategy – an approved plan including 30 packages of proposals designed to improve transport links across the County which will improve access to a range of employment locations and open up new opportunities and will link key employment sites and other employment areas: and
- A potential new station at Park Plaza Broxbourne to serve major new employment locations nearby.

Figure 2.1 A414 Corridor Strategy Location



Source: Hertfordshire County Council

2.2 Local Employment Studies

2.2.1 **Table 2.1** below contains the main conclusions taken from various local employment studies for districts within Hertfordshire. It should be noted that some of these studies are more than 5 years ago and may not have included the latest information in loss of employment land from the LSH study.

2.2.2 We also note that some of the studies (particularly the South West Herts Economic Study update in 2019) indicates that there are a number of errors and inaccuracies in the employment data which makes it difficult to understand recent economic and labour market trends. While some corrections have been made in the studies, detailed data should be treated with appropriate caution.

Table 2.1 Local Employment Studies Key points

Local Employment Study Ref	Key Points
Broxbourne Employment Land Study 2016	<ul style="list-style-type: none"> • The forecast in employment floorspace and land suggests the local office sector will grow and that the industrial sector, comprising manufacturing and warehousing, will continue to play an important role in the Broxbourne economy. • There is relatively little existing vacant developable land or available floorspace on the market. • The supply-constrained nature of existing employment land indicates a need for retention of employment land, though there are some sites which are poor quality in terms of their environment and premises.

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> • Where suitable and appropriate, existing employment land should be utilised more effectively to support growth. • Evidence suggests that there is also the potential to realise a step change in growth with demand for office and R&D relating to knowledge based industries such as life sciences, and business services, including IT, digital and finance. • To meet the demand, purpose built high quality spaces in a format similar to a business park are recommended. New employment land would be needed for this and the de-designation of greenbelt land would need to be considered. • New employment land options suggests that a strategy to create a new business campus at Brookfield (C33) and/or TwentyFive25 (C32) could be a way forward
<p>Dacorum Employment Land Availability Assessment 2017</p> <p>Three Rivers 2010</p> <p>Watford 2019</p> <p>South West Herts Economic Study 2019</p>	<p>Dacorum:</p> <ul style="list-style-type: none"> • In Dacorum there is little potential in the existing stock of employment land for intensification. This is because it is largely well-occupied. Where it is not well-occupied, there has been significant pressure from residential development. • There is substantial vacant land (and vacant floorspace) at Maylands Gateway. • Dacorum Borough Council (DBC) should take a more flexible approach to employment land in Maylands, particularly those vacant sites which the market suggests could come forward for industrial development if they were offered. • DBC should consider allocating further sites: <ul style="list-style-type: none"> ○ South west Kings Langley is the location with the most potential in market terms • DBC should consider allocating further sites for local industrial occupiers to allow for churn and choice e.g. where existing sites are approaching the end of their viable lifespans and might be more suited to redevelopment for alternative uses, providing a pipeline of local quality sites would allow this to happen. <ul style="list-style-type: none"> ○ sites on the A41 corridor, specifically at Tring and Two Waters (Hemel Hempstead) in proximity to existing employment uses, could be considered by DBC as potential employment allocations. <p>Three Rivers:</p>

Local Employment Study Ref	Key Points
	<p>Three Rivers shows the following supply issues in regard to the London Arc targets:</p> <ul style="list-style-type: none"> • A shortfall in industrial/warehouse supply circa 14,000 sq.m. up to 2031 • A number of the sites are coming under pressure for changes of use to residential (e.g. Tolpits Lane), however this should be resisted. Take-up of office and industrial space has increased at this site in recent years and there is now less than 1% of space available. In total the site provides over 100,000 sqm of occupied employment space, more than a third of Three Rivers total occupied space. Any loss of B use classes would result in displacement of businesses and erode capacity. • Croxley Business Park has been in high demand from office occupiers. One speculative development is now fully let, and another speculative development is due for completion in early 2020. • Two further areas for expansion have been put forward for the expansion of Croxley Business Park (1 ha in total). One has received planning permission, while the other would be subject to Green Belt release. • The only site with potential for intensification uses is Maple Cross/Maple Lodge. <ul style="list-style-type: none"> ○ Resist loss of industrial/warehouse land and encourage development at Maple Cross ○ Minimise loss of employment land at Kings Langley ○ Consider a southerly extension on the Home Park Industrial Area into the Green Belt ○ Allow some B2/B8 land at Leavesden ○ To minimise office space loss, protect office land at Rickmansworth ○ Promote Leavesden office space and safeguard surrounding land <p>Watford</p> <ul style="list-style-type: none"> • Watford contains 1,202,016 sq.m. of employment land, which equates to approximately 1/16th of the borough’s land. The sites with the largest site areas are Imperial Way/Colonial Way (342,195 sq.m.), Watford Business Park (287,376 sq.m.) and the Greycaine Road/Odhams/Sandown Road area (243,542 sq.m.) • Largest proportion of floor space uses are B1a (office), B8 (storage and distribution) and B2 (general industry).

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> ○ The vacancy rate is 5.22% ○ 39% of floor space in the employment areas is taken up by non B uses <ul style="list-style-type: none"> ● There is approximately 396,311 sq.m. of B class floor space in Watford. However, the Economic Growth and Delivery Assessment (EGDA, 2014) has found that there was 672,000 sq.m. of B class floor space in 2012, which would indicate a net loss of 275,689 sq.m. of employment floor space in a six year period. This equates to 41% of the borough’s total employment floor space as of 2012. ● Vacancy levels are 5.22% throughout the borough. Watford’s figure is somewhat low, which may indicate lack of space. This may cause high rent prices and act as a limit to businesses who wish to expand or relocate to the town. ● Although there is currently over 11,000 sq.m. of available office space (with over 6,000 sq.m. on Clarendon Rd), the overall vacancy rate on these sites is still very low and the available space is of a high quality. None of the sites have any potential for intensification. ● Watford Junction could provide up to 64,900 sq.m. of employment space as part of the redevelopment of the area around the station. <p>South West Herts Economic Study Update, 2019</p> <ul style="list-style-type: none"> ● Employment has continued to grow at a strong rate: the long-term growth rate is around 0.4% p.a. but recent levels of growth are much stronger (1.5 to 2.8% p.a. based on the average growth rate over the last ten and five year periods) ● Productivity has fallen and is now lower than the UK average: average GVA per job has fallen by £1,000 and is now 2% lower than the national average, having been 8% higher in 2001

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> • Offices - Recent demand for office space in South West Herts has been strong, High quality amenities and access to a rail station are key requirements for attracting high value office occupiers, The availability of office space is now at very low levels, creating a significant barrier to growth and investment; the recommendation is that all South West Herts authorities should resist pressure for further changes of use in key employment areas. Analysis of office rents and market trends show that speculative development is viable in Watford, St Albans and Croxley Park. Prime rents have also been increasing at Maylands and in Borehamwood, although these are not yet at a level where new development is viable. The study concludes that the South West Herts authorities should aim to provide 188,000 sq.m. of additional office space between 2018 and 2036. • Industrial market – has also seen very strong growth in demand; there is a severe shortage of space in small units, and a shortage of space in medium and large units. With such limited space available, it will be very difficult to accommodate demand for even modest amounts of space. There is therefore a significant danger that they will lose out on potential investment. There may also be knock-on consequences for productivity if local businesses are dependent on a supply of local storage and distribution facilities for their supply-chains. There has been a 10% decrease in South West Herts’ industrial stock since 2008. The study identifies a need for 481,500 sq.m. of industrial space between 2018 and 2036. This can be further divided in to 152,000 sq.m. of B1c/B2 space and 329,500 sq.m. of B8 space.
<p>East Herts Employment Land Review 2013</p>	<ul style="list-style-type: none"> • The study identified 42 major employment locations in the district, • East Herts towns (perhaps with the exception of Bishops Stortford) are not considered by the market as prime commercial property locations – they fulfil local rather than regional needs, • The majority of office space was built pre-1940 and is not attractive to modern occupiers, • Apart from Bishops Stortford, the main problem is poor road links, • In 2008 there was an oversupply of both office and industrial premises and very little new development in the pipeline, • Low demand reinforces the low quality of the stock forming a further barrier to attracting new occupiers, • Bishops Stortford bucked the trend with low vacancy and good links to the strategic road network,

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> • Most estates ranked ‘Amber’ could benefit from some refurbishment and better signage/branding, • Where there is a high vacancy rate, ‘Red’ estates could be considered for release provided that better quality employment locations could be found to replace them; and <p>Predicted structural change up to 2021 will see a reduced demand for B2 (general industry) premises but increased demand for B1 (offices, R&D) and B8 (warehousing and distribution). Whether redevelopment of existing B2 areas for B1 takes place will depend on the overall location and attractiveness of the estate.</p>
<p>Hertsmere Housing and Economic Land Availability Assessment 2019</p>	<ul style="list-style-type: none"> • Available industrial floor space in Hertsmere is estimated to be 61,530 sq.m. with the demand being calculated at 81,900 sq.m. and the availability rate ranging from 2.0% for small units to 7.3% for large units. The vacancy rate in 2018 was 2.9%. Over the past decade, Hertsmere’s annual take-up of industrial floorspace has averaged 2,100 sq.m. (2009 – 2018) • There is an estimated shortfall of 8,142 sq.m. of available office floor space in Hertsmere, with the demand being calculated at 35,700 sq.m. and the availability rate being less than 3%. Over the past decade, there has been an average net take-up of 1,400 sq.m. (2009 – 2018). • Provision will be made for the supply of at least 110 ha of designated employment land for B-class development up to 2027. • High rates of enterprise: highest business start-up rate in SW Herts, 22 new businesses per 1,000 working age people in 2016. • Good transport connections: well-connected strategic road network, with A1 (M), M1 and M25. Along with notable rail links at Borehamwood, Radlett and Potters Bar. • Strength in TV and Film production: High concentration in creative industries with high Location Quotients in publishing, broadcasting, arts and entertainment.
<p>North Herts Employment Study 2013</p>	<ul style="list-style-type: none"> • During the period 1998-2011, North Hertfordshire experienced a 10% decline in employment (4,800 job losses), compared to an 8% growth in employment at regional and national levels. • Losses were experienced across all B use classes with the greatest changes experienced in B2 (-21%) and B1 (-20%) followed by B8 (-7%).

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> • In 2008, there was approximately 877,000 sq.m of B class employment floorspace in North Hertfordshire District. Of this, 18% was offices, 47% industrial and 35% warehouse/distribution floorspace. Relative to surrounding districts, North Hertfordshire includes a higher proportion of industrial floorspace. • The total office stock in North Hertfordshire was 157,860 sq.m in 2008. In November 2012, a total of 22,800 sq.m office floorspace was estimated as being vacant in North Hertfordshire. This represents around 14% of the total office stock in the district. • The total industrial and warehouse stock in North Hertfordshire comprised 716,000 sq.m in 2008. In November 2012, there was a total of 50,900 sq.m of available industrial and warehouse floorspace available. This represents around 7% of the total industrial and warehouse stock in North Hertfordshire. • There will be low demand for B1a/b floorspace and land in North Hertfordshire. Between 2.3 ha and 3.7 ha will be required up to 2031. • The labour demand and supply forecasts suggest that there will be contracting employment land needs for B1c/B2 of between -17.5 and -26.7 ha. At the same time, past trends suggest that the greatest requirements are for B1c/B2 space, with 31.8 ha required. Estimated a surplus of land of up to 26.7 ha. • B1a/b – No evident shortfall at district level, some local needs may need addressing. • B1c/B2 – Overall surplus. Recycling of existing provision recommended. • B8 – Additional land required up to 2031, potential for future sites include Hitchin, Royston Rd in Baldock and York Way in Royston. <p>Overall – There is sufficient supply of lands to meet future needs.</p>
<p>St Albans Economic Development and Employment Land Evidence 2016</p>	<ul style="list-style-type: none"> • There is a continuing need for some business land and premises to be safeguarded for local economic development purposes. In particular the need is for small / medium business premises (including start-up / expansion space) to be available. This general need includes utility, and “dirty” / waste / recycling uses. • There is a need to sustain the strategic office cluster role of St Albans City Centre, especially in face of pressures and freedoms for conversion and redevelopment for residential uses.

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> • There is a need to facilitate longer term sub-regional growth opportunities that respond to the LEP SEP for Hertfordshire (specifically for the M1/ M25 growth area) and act as a contribution to local, sub regional national growth. • There is a need to facilitate continued special, high intellectual value, research and development uses in constrained Green Belt settings (Rothamsted Research and BRE). This will support the Green Triangle partnership initiative, including links to Oakland College and the University of Hertfordshire. • Generally, premises vacancies are low and there is little or no spare land available for new development. • The non-central area employment locations are also often serving as a home for companies performing a local service function. In many cases this includes retail / quasi-retail uses. These areas are essential to provide the services that keep any local area functioning. • Road access to some of the sites is not ideal, especially for heavy goods vehicles. However, it is important to note that often sites with more limited road access will be well placed for general employee and customer access within the urban areas. • The market preference now appears to be for conventional central locations with public transport, service and cultural links (such as St Albans City), rather than business park locations. • Despite forecasts and trends for a general decline in shed floor-space need, there will be a range of special shed / non office premises needs that could result in additional demand for employment land.
<p>Stevenage Employment Technical Paper 2015</p>	<ul style="list-style-type: none"> • Within the Stevenage Borough Local Plan 2011-2031 Publication Draft (January 2016), Policy EC1 allocates seven sites for employment development over the plan period. SBC estimates that together, these sites have the potential to accommodate over 140,000 sq.m. of employment floorspace to 2031. • The 2015 Employment Technical Paper also identified a number of sites within Gunnels Wood where it is considered that more intensive use could be accommodated through redevelopment and/or intensification. This is particularly true in that part of Gunnels Wood closest to the town centre, identified as an 'Edge of Centre Zone' in the draft plan.

Local Employment Study Ref	Key Points
	<ul style="list-style-type: none"> • Data suggests that there is insufficient land available to meet the trend-based requirement for employment land in Stevenage over the 20 year plan period 2011-31. Under this scenario, around two thirds (62%) of the trend-based requirement of c. 30 ha would be met, resulting in a shortfall of approximately 11.5 ha of employment land. • The need for some employment provision to be made outside of the Borough boundary appears inevitable and the Council will need to pursue other opportunities to accommodate its need through the Duty to Co-operate.
<p>Welwyn and Hatfield Economy Study 2017</p>	<ul style="list-style-type: none"> • The latest monitoring data (2014-2015) show that since the introduction of permitted development rights for the change of use from office (B1a) to residential use, approved prior approvals would result in a theoretical loss of 31,840 sqm of office floor space. • The additional requirement for B1a/b floorspace over the period 2013-2032 is projected to be around 138,000 sq.m • Welwyn should have sufficient employment floorspace to meet its additional needs over the period to 2032, apart from in the provision of warehousing (B8) • Vacant land without planning consent could result in a shortfall by 2032. • The Council should actively seek to protect its existing fit-for-purpose employment sites. • Future potential Strategically Important Office Locations include Shire Park, Rest of Bessemer and Hatfield Business Park. Shire Park and Rest of Bessemer Road are two key locations, home to good quality office development in Welwyn Garden City's main employment area, in the east of the town centre. This provides employees with easy access to town centre amenities. The sites are directly adjacent to each other, providing businesses with agglomeration benefits. These effects are particularly important to businesses in the knowledge economy. Both sites have dedicated car parking and are easily accessed by road. • Property agents suggest there is low demand and oversupply in the office market and severe shortage of supply – particularly of larger premises – in the industrial and warehousing market. • Some uncertainty as to whether all the allocated land and sites with planning permission will come forward. If this is the case, then Welwyn Hatfield would have a shortfall of employment floorspace.

Conclusions

- 2.2.3 There are local employment studies available for all districts, although some are now five or more years old, and may not have therefore considered the loss of employment highlighted in the LSH study. The general view is that local authorities should now be much more protective of existing employment land, although there will need to be some flexibility retained to deal with new opportunities and redundant stock.

2.3 Current Hertfordshire Employment

- 2.3.1 This section firstly discusses the concept of a key employment site and describes those currently identified in Hertfordshire. It then summarises the current employment data within Hertfordshire and within the separate districts. Data provided by HCC is also included and analysed to estimate change over time and future predictions for jobs.

2.4 What is a Key Employment Site?

- 2.4.1 Defining a key employment site enables identification of those sites be regarded as high-level priorities at County level for strategic economic growth, enabling a focus on strategic priorities for mitigation and strategy measures. However, this study recognises that:

- The focus of the key employment sites described below is largely on industrial and research-dominated locations which align closely with the emerging LIS and LEP strategic priorities.
- There are many other employment locations, and in particular town centres, that are very important to the Herts economy and may also need strategic attention and investment.
- The list of key sites should not be 'set in stone' – there will be cases where local authorities have other existing or emerging employment locations where a case can be made for appropriate strategic investment.

- 2.4.2 A 2011 Study³ developed a definition of a strategic employment site. While this study is a little dated, and some circumstances have changed, it is believed that many of its findings and recommendations are still relevant now. The definition proposed in the study was reviewed and, is supported, with some additions, as below:

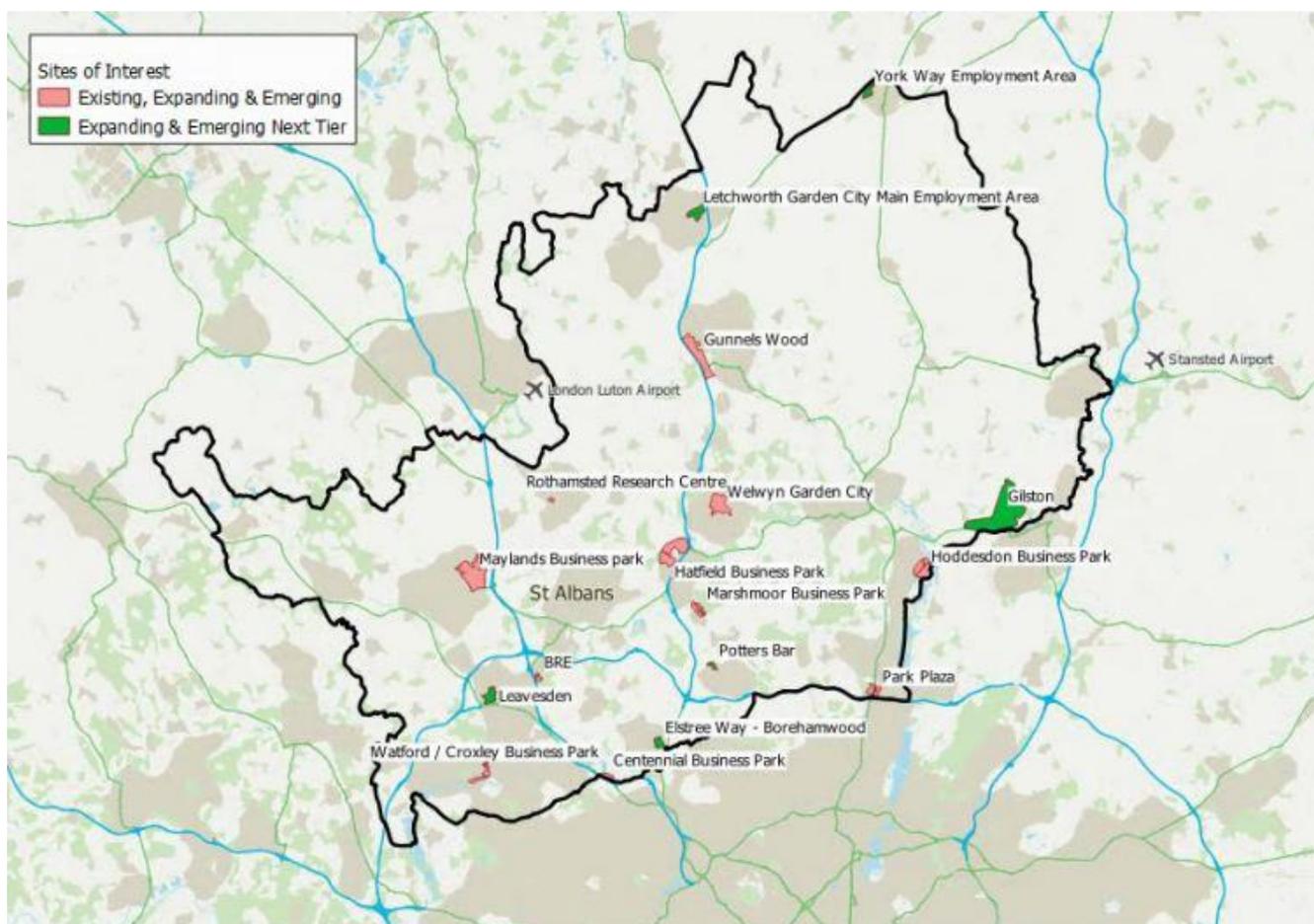
- **Of an appropriate scale** - capable of accommodating regional (potentially national) strategic development, which could not equally be accommodated elsewhere.
- **Of an appropriate quality** - high quality sites which are attractive to national and international investors and key employers in Hertfordshire.
- Sites should be of **regional/inter-regional/or national significance** and capable of raising the profile and economic performance of the region and Hertfordshire, with

³ Hertfordshire County Council and East of England Development Agency (EEDA), Hertfordshire Strategic Employment Sites Study, April 2011.

- a focus on strategic economic sectors, and offer potential for ‘clustering’ of businesses around these.
- **Able to build a clear identity** - a clear identity/ brand and future vision for the site. The quality of the floorspace, environment and amenities should be sufficient to accommodate large scale users or higher value added uses, which fit with the overall strategy for that site.
 - **Able to demonstrate a good fit with wider policy** - In particular sites should accommodate **leading edge sectors**, accommodate uses that add to the ‘economic base’ of the region and are clear economic drivers, offer (or have the potential to offer) **high levels of accessibility by public and private transport** and be consistent with transport policy.

2.4.3 Based on this earlier work, discussions during the scoping phase, literature reviews and discussions with the project steering group, a selection of seventeen employment sites within the County were identified. These sites have been loosely categorised as ‘Existing Expanding and Emerging’ and ‘Expanding and Emerging Next Tier’ sites and are shown spatially in **Figure 2.2** below and tabulated in Table 2.2.

Figure 2.2 Selected Key Employment Sites



2.5 Key sites - accessibility and qualitative factors summary

2.5.1 This section summarises the broad accessibility of each key site and various qualitative comments on each from the Local Employment Studies, Southwest Herts Economic Study 2019 and the Strategic Herts Employment Site Study 2012.

Site	Accessibility	Qualitative comments
BRE	<ul style="list-style-type: none"> • Access is via residential roads however the strategic network is in close proximity, • The site is served by a local bus route (635). 	<ul style="list-style-type: none"> • Limited potential for expansion due to the location of an adjacent SSSI, • Nationally renowned R&D site with strategic importance.
Centennial Business Park	<ul style="list-style-type: none"> • Close proximity to the A41/M1 corridor with the A1 and M25 easily reached, • High level of parking. 	<ul style="list-style-type: none"> • Large and modern industrial park, • Contains large quantity of grade A office space, • Demand for space strong with occupation nearly full, • Potential for expansion to the north.
Elstree Way - Borehamwood	<ul style="list-style-type: none"> • Some areas within walking distance of Borehamwood Town, • Easy access by train – Thameslink, • A1 Barnet pass-by allows in proximity. 	<ul style="list-style-type: none"> • Large site with mixed uses, • Occupancy rates relatively high, • Scope for some redevelopment and intensification within the area.
Gilston	<ul style="list-style-type: none"> • Planned access and improvements to the local and strategic road network (A414). 	<ul style="list-style-type: none"> • Commercial floorspace will provide opportunities for people who want to live and work locally • Currently undeveloped floorspace for large-scale employment will not be provided
Gunnels Wood	<ul style="list-style-type: none"> • Good connections to the A1 and wider road network, • Good internal roads and turning areas, • Off-street parking is provided; there is also a reasonable amount of on-street parking, 	<ul style="list-style-type: none"> • Approx. 80% of employment land in Stevenage is located within Gunnels Wood, • Competitive rents and property values, • Internationally leading tenants, • Gunnels Wood employment area provides more modern, good quality office accommodation at competitive rents, meeting demand from firms at the lower/smaller end of the market, • Contains the council owned and led Business and Technology Centre (BTC),

Site	Accessibility	Qualitative comments
	<ul style="list-style-type: none"> • Stevenage Train Station is adjacent to the site • Areas of the site to the north and south are not within walking distance of the station or main town. • Excellent cycling facilities linking sites 	<ul style="list-style-type: none"> • Coherent identity is an issue highlighted throughout the site, • Some areas could benefit from intensification whereas others would require full redevelopment.
Hatfield Business Park	<ul style="list-style-type: none"> • High quality cycle lanes and bus services to existing park, • Strategic road network in proximity. 	<ul style="list-style-type: none"> • Good quality B1 and B8 land uses with large companies including Mercedes Benz, Aerospace and distribution centres, • Located on urban fringe so amenities are quite a distance away.
Hoddesdon Business Park	<ul style="list-style-type: none"> • Northern section in proximity to Rye House Station, • Strategic road access is direct via the internal road to the A1170. 	<ul style="list-style-type: none"> • The Council views the park as having reached its natural limits, • Occupation high except for some smaller premises, • Premises generally in good condition with some of poorer quality.
Leavesden	<ul style="list-style-type: none"> • Excellent links to strategic network, • Shuttle to Watford Station, • High level of parking. 	<ul style="list-style-type: none"> • Well maintained site, • High quality commercial stock, • Full occupation, • Amenities on site and in proximity could be improved.
Letchworth Garden City Main Employment Area	<ul style="list-style-type: none"> • Road access to strategic network longwinded with residents being affected, • Local bus services provide routes through the site linking to the Town Centre and Letchworth Garden City Train Station. 	<ul style="list-style-type: none"> • A mix of B1, B2 and B8 floorspace together with some retail and sui generis uses, • Premises vary in age and quality with some larger high-tech occupiers, • Large number of vacant plots mixed in with areas of intensive development, • Mixed land ownership and lease agreements would make some areas complex to redevelop.

Site	Accessibility	Qualitative comments
Marshmoor Business Park	<ul style="list-style-type: none"> • Located adjacent to Welham Green Station, • Access to the A1, • Local bus services operate to the site, • Upgrades to the road infrastructure proposed, 	<p>Currently undeveloped, Proposed high quality B1 floorspace.</p>
Maylands Business park	<ul style="list-style-type: none"> • Strategic road network in proximity with the potential for good access, • Public transport provision is poor. 	<ul style="list-style-type: none"> • Significant areas of vacant land, • Recent office development on site are high quality, modern and offer amenities, • Site is safeguarded for office use which is deemed a negative by tenants requiring other B uses, • The site is included in the Herts Envirotech Zone, • Provides a large number of large floorplate units, • Mixed building stock, • Considerable on-street parking with internal roads and layout reasonable, • High number of blue-chip companies on site, • Large area available for expansion, • Suited more for industrial/warehouse/distribution rather than office.
Park Plaza	<ul style="list-style-type: none"> • Road transport access is excellent – can be congested at peak times, • Links to public transport are accessible but distances are high via a footpath into Waltham Cross Town Centre. 	<ul style="list-style-type: none"> • Modern buildings and internal road design, • Northern site has been actively marketed with no environmental obstruction, • Site as a whole has some extant permissions.
Potters Bar	<ul style="list-style-type: none"> • The site is served by a local bus service, • Road access is poor, • Overspill parking causes issues. 	<ul style="list-style-type: none"> • Suffers from traffic and parking problems, • Location not easily accessed from strategic road network, • Mix of small scale B1, B2 and B8 with generally good occupancy, • Greenfield land is available for expansion,

Site	Accessibility	Qualitative comments
		<ul style="list-style-type: none"> Recent investment has modernised some units, Less commercially attractive than other sites, Policy supports the sites continued use and retention of the expansion area for employment use.
Rothamsted Research Centre	<ul style="list-style-type: none"> Strategic road access and parking available, No bus services to the site, Harpenden Station within walkable distance. 	<ul style="list-style-type: none"> International hub for companies in agri-tech, Part of Herts Envirotech Zone and Green Triangle project linking BRE and Herts Uni, Deemed a 'Special Employment Area' in St Albans Local Plan, Underused land and buildings, Amenities in Harpenden Town Centre within walking distance.
Watford / Croxley Business Park	<ul style="list-style-type: none"> Strategic road network in proximity to both sites, Public transport available to Underground and National Rail stations, Free shuttle bus 'W30' connecting Croxley to the surrounding area including Watford Junction Station (15 mins frequency). 	<ul style="list-style-type: none"> Croxley and Watford experience traffic congestion problems, Croxley provides a high-quality managed space with amenities, lacks critical mass with above average vacancy, Relationship between the two sites is complicated, Croxley site is deemed fully built out with the Watford site having potential for development, The decision to stop the Met Line extension is a risk to the future of both sites, Watford site has a CPO under recommendation, Watford site has a significant proportion of properties over 50 years old, of poor specification and deteriorating. The supporting road and communication infrastructure are also outdated, Watford site property and land uses are disjointed.
Welwyn Garden City	<ul style="list-style-type: none"> Good quality internal and strategic road access, Welwyn Garden City Station is in proximity to the western side of the site, 	<ul style="list-style-type: none"> Large area generally strategically located and separated from residential neighbourhoods, Large areas of vacant land, Mixed B class land uses with varying sized units, Welwyn Town Centre provides amenities to the west of the site,

Site	Accessibility	Qualitative comments
	<ul style="list-style-type: none"> • Bus services across the site. 	<ul style="list-style-type: none"> • Due to be brought under Article 4 direction on 12th October 2020.
York Way Employment Area	<ul style="list-style-type: none"> • Excellent links to strategic network and Royston Train Station, • Local bus route 16 operates within the site. 	<ul style="list-style-type: none"> • Small number of vacant units, • Intensive development with scope for expansion into the northern area Royston Business Park, which is currently underway and supported by the authority, • Variety of building stock.

2.6 Analysis of Employment Land Changes

2.6.1 Planning data was provided by the County to help inform the project team of the general locations where employment land has been ‘lost’ and where growth is expected – this was based on information provided to the County by the districts.

2.6.2 Data came in the form of GIS shapefiles and spreadsheets. An example of the shapefile data and metadata within the files for Centennial Park in Elstree is contained within Appendix A. Using this data, the key sites noted above could be investigated and estimated job changes within them identified.

2.6.3 The planning data provided past information from 2014 to 2018 and projected information to 2036. **Figure 2.3** shows an estimate of the changes in jobs that each of the key sites has experienced since 2014 and those expected by 2018 through local plan allocations. These estimates were derived by applying broad employment densities to changes in floor areas of various employment types. **Table 2.2** contains the tabulated data.

Figure 2.3 Historic and Future Job changes 2014 to 2018 to 2036

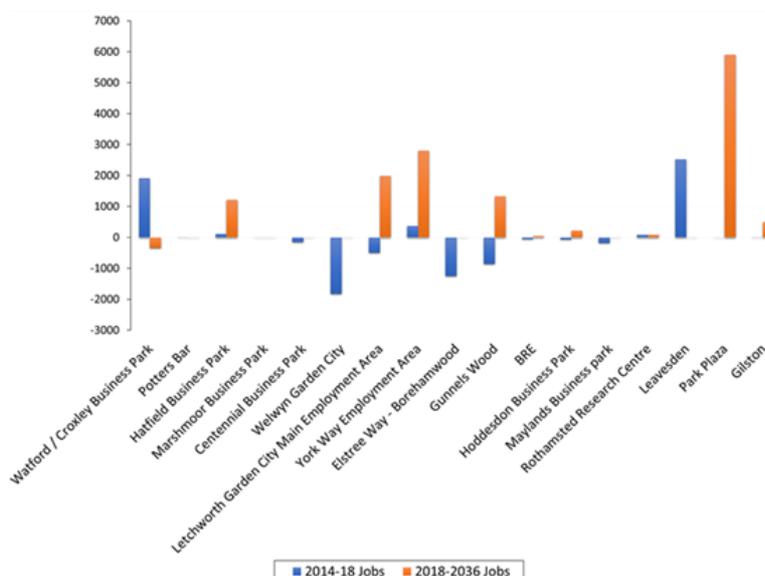


Table 2.2 Key Sites Size and Job Change Summary

Site	Type	Gross Site Area SQM	Historic Job Changes 2014 - 2018	Future Job Changes 2018 - 2036	2015 Base Jobs	2036 Future Jobs
BRE	Existing Key Emp Site	159,551	-49	43	1,250	1,244
Centennial Business Park	Existing Key Emp Site	218,950	-151	0	3,000	2,849
Elstree Way - Borehamwood	Next Tier	377,571	-1,250	0	3,750	2,500
Gilston	Next Tier	50,000 ⁴	2	498	300	800
Gunnels Wood	Existing Key Emp Site	1,840,064	-859	1,324	16,225	16,690
Hatfield Business Park	Existing Key Emp Site	671,721	115	1,210	11,725	13,050
Hoddesdon Business Park	Existing Key Emp Site	1,152,230	-62	220	8,375	8,533
Leavesden	Existing Key Emp Site	640,730	2,528	0	1,660	4,188
Letchworth Garden City Main Employment Area	Next Tier	699,808	-489	1,988	8,875	10,374
Marshmoor Business Park	Existing Key Emp Site	167,572	0	0	2,375	2,375
Maylands Business park	Existing Key Emp Site	2,165,411	-176	0	15,000	14,824
Park Plaza	Existing Key Emp Site	512,325	0	5,900	950	6,850
Potters Bar	Next Tier	143,765	4	0	2,750	2,754
Rothamsted Research Centre	Existing Key Emp Site	76,003	82	85	525	692

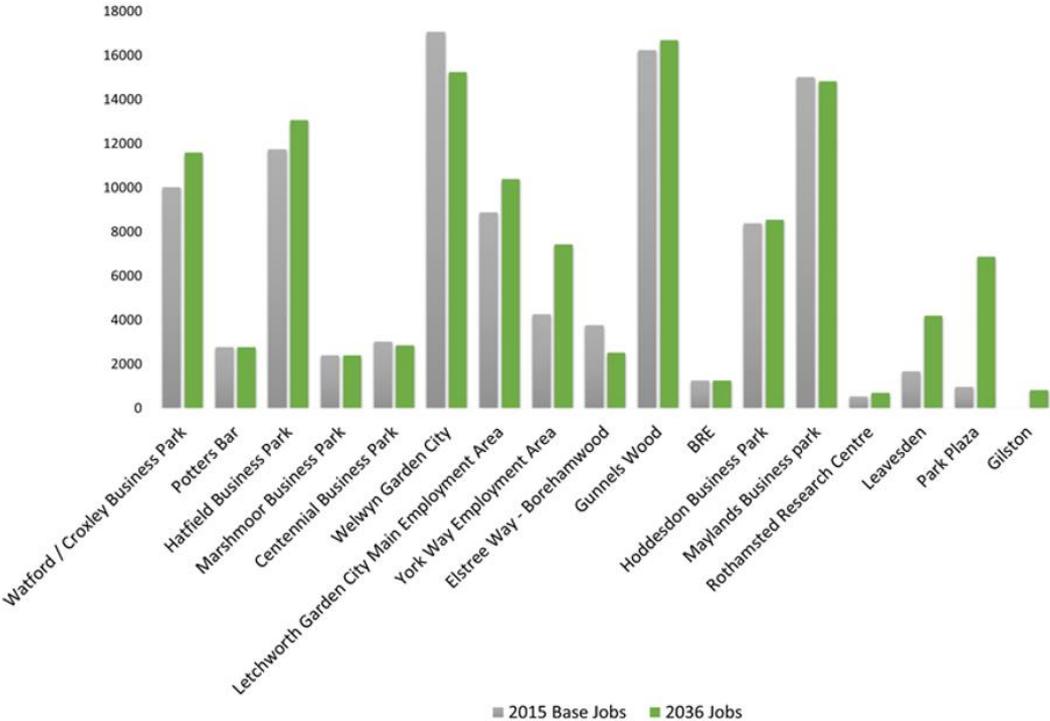
⁴ Local Plan refers to 5ha employment land

Site	Type	Gross Site Area SQM	Historic Job Changes 2014 - 2018	Future Job Changes 2018 - 2036	2015 Base Jobs	2036 Future Jobs
Watford / Croxley Business Park	Existing Key Emp Site	483,551	1,911	-334	10,000	11,577
Welwyn Garden City	Existing Key Emp Site	1,308,978	-1,818	0	17,050	15,232
York Way Employment Area	Existing Key Emp Site	390,950	368	2,802	4,250	7,420

2.6.4 **Figure 2.3** and **Table 2.2** show that the majority of key sites experienced a loss of jobs (estimated from a loss of floorspace) from 2014 to 2018, with only a few, notably the Watford/Croxley and Leavesden sites, experiencing increases. Estimates of future job changes (also based on floorspace changes) show increases at the majority of sites, with York Way, Park Plaza and Hatfield Business Park expected to increase the most. Some sites show no change in the period, although of course change is dynamic as sites progress through the allocation process.

2.6.5 In order to understand the significance of these job changes a ‘baseline’ number was also estimated. The most appropriate available data was the UK Business Register and Employment Survey (BRES); this was analysed by census Lower Super Output Area (LSOA), and this provided a very broad estimate of jobs in 2015 at each key site. LSOA boundaries are not coterminous with the boundaries of the employment sites, so adjustments were made to the BRES data at this spatial level to generate estimates which better reflect the spatial area and economy of each employment site. The estimates for 2015 employment are shown in **Table 2.2** and in **Figure 2.4**. The estimates should be interpreted as indicative rather than definitive, in that they come from two different sources, have been adjusted for spatial inconsistencies (between LSOA and employment site area) and the BRES data contains some inaccuracies as company workforces can be ‘reallocated’. However, the estimates do provide an indication of the scale of each employment site (in terms of employment) and expected change.

Figure 2.4 BRES Data 2015 Base with Planning Data 2036 Jobs Estimates



2.6.6 **Figure 2.4** shows that the majority of key sites are expected to experience a growth in jobs from the 2015 base. Some decreases are expected at Centennial Business park, Elstree Way, Welwyn Garden City and Maylands Business Park, based on current planning data. Where new sites are coming on-line as part of Local Plan allocations only a 2036 job year column is shown as little to no jobs existed in the 2015 base year, notably Park Plaza.

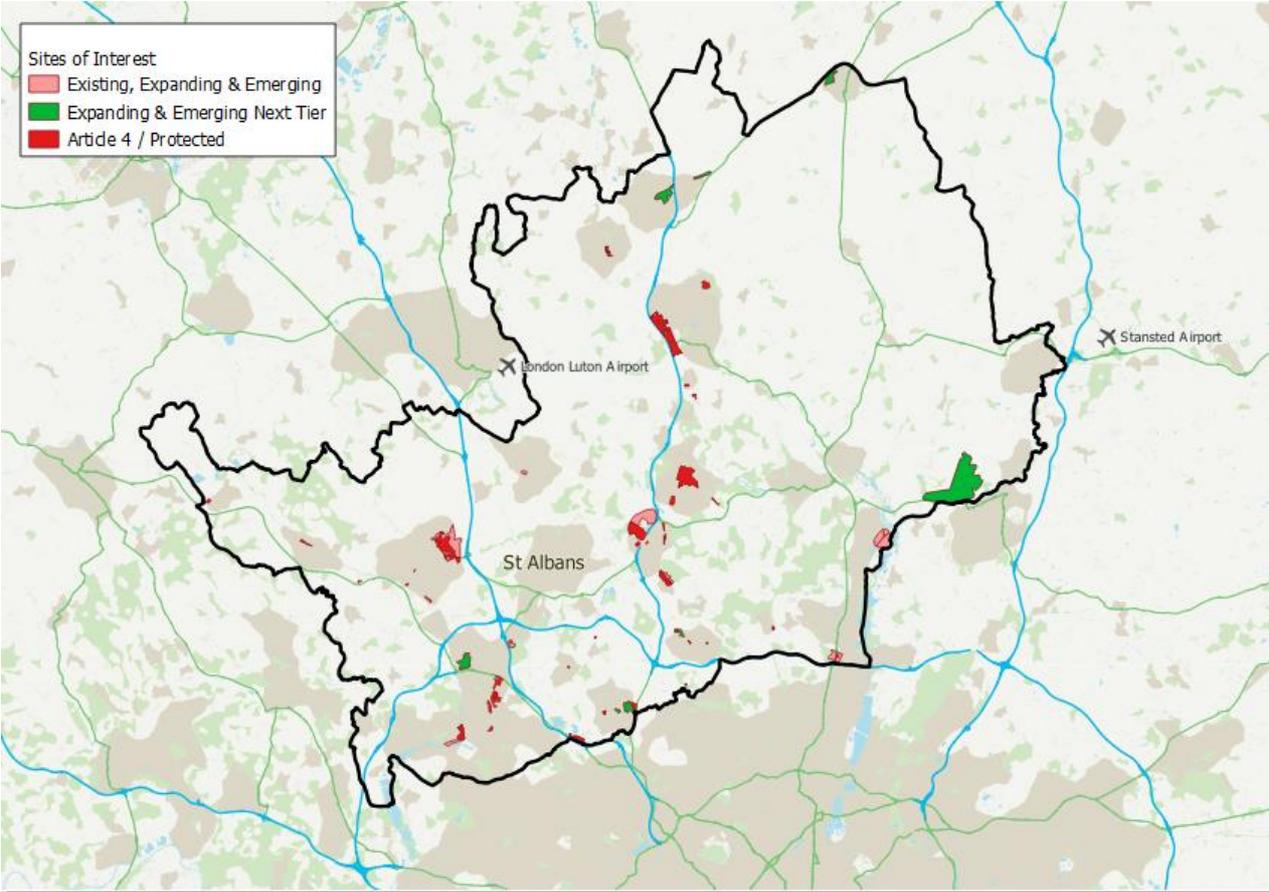
2.6.7 The planning data also showed that a number of other sites were earmarked for significant future job growth that were not included as a 'key site'; notably these were at Cheshunt Lakeside and Bishop Stortford with 1,800 and 1,123 jobs respectively.

2.7 Protection of Employment Sites through Article 4 Direction

2.7.1 The current situation in respect of land under Article 4 direction (which prevents permitted development rights from changing the land use to residential) is shown below in **Figure 2.5**.

2.7.2 It can be seen that the majority of existing key sites have some Article 4 protection within them or in close proximity. It should be noted that during the workshop, it was stated that a number of districts are now moving forwards with protecting other sites and the total area of land under Article 4 direction is increasing.

Figure 2.5 Article 4 Direction Sites



2.8 Summary and Conclusions

2.8.1 It is clear from the above sections that the existing supply of key employment sites within Hertfordshire varies in nature and is spread spatially, and the sites have varying accessibility and other characteristics. While there have been historic reductions in employment land, many locations are expected to grow in scale in future. The protection of employment land use from permitted development rights has been and is becoming an important tool to combat further losses; local authorities are now realising they must act to preserve and safeguard land in order to meet the employment projections.

3. Future Demand & Employment Trends

3.1 Preamble

3.1.1 In order to create a relevant and implementable strategy focused on employment sites, it is important to consider the demand for the commercial space that they provide. This demand is reflected in the existence and growth of the businesses that occupy employment space across the County. This section therefore focuses on the profile and trends associated with the Hertfordshire economy and relates that economy to the employment sites that are the focus of this study.

3.1.2 This section focuses on two key themes:

- Current demand – employment and firms (County-wide and for the 10 districts)
- Potential future demand and implications for employment land and sites.

3.2 Current Demand – Employment and Firms

Economic Overview

3.2.1 This section presents a brief description of the current size and profile of the Hertfordshire economy. Key headline statistics regarding the scale of the Hertfordshire economy are as follows:

- 65,640 enterprises in 2019, up from 46,800 in 2010 (40% growth, above the England average of 31%)⁵.
- 665,000 jobs in 2018, up from 538,000 in 2010 (25% growth, more than double the rate of growth for England at 12%)⁶
- £40.7bn in GVA in 2018, up from £28.1bn in 2010 (45% growth, higher than the average for England at 34%)⁷
- GVA per job filled of £58,130 in 2017, up from £49,580 in 2010 (8.5% growth, which is half the England rate of growth at 17%). This places the County 53rd out of 133 NUTS3 areas in England⁸.

3.2.2 These data paint a comparatively healthy picture of an economy which is growing faster than the national average, although productivity measures such as GVA per job filled suggest that progress in Hertfordshire is slower than elsewhere.

Employment Trends in Key Sectors

3.2.3 In this and ensuing sections, the emphasis is placed on employment as a key economic indicator. This is because of the relationship that exists between jobs and employment space,

⁵ ONS UK Business Counts

⁶ ONS Business Register and Employment Survey (BRES)

⁷ ONS, Regional Accounts (GVA current price estimates)

⁸ ONS, Regional and Sub-regional Productivity, February 2019 release

which lies at the heart of employment density figures used so frequently in the property, planning and development arena⁹.

- 3.2.4 **Table 3.1** below identifies the top 10 business sectors in the County by total employment in 2018. It also shows the scale and rate of employment change that each of these sectors has experienced since 2015.

Table 3.1 Employment Growth in Herts Top 10 Sectors

Sector	Employment 2015	Employment 2018	% of Herts Economy	Total emp change 15-18	% Emp change 15-18
Business Admin & Support Services	83,500	102,500	15%	19,000	23%
Professional, Scientific & Technical	75,000	92,500	14%	17,500	23%
Retail	63,000	60,500	9%	-2,500	-4%
Health	55,000	58,500	9%	3,500	6%
Education	47,500	50,000	8%	2,500	5%
Construction	39,500	42,500	6%	3,000	8%
Accommodation & Food Services	34,500	37,500	6%	3,000	9%
Wholesale	32,000	35,500	5%	3,500	11%
Manufacturing	34,500	34,500	5%	0	0%
Information & Communication	32,500	32,500	5%	0	0%

Source: ONS BRES (Ref: W4/S1)

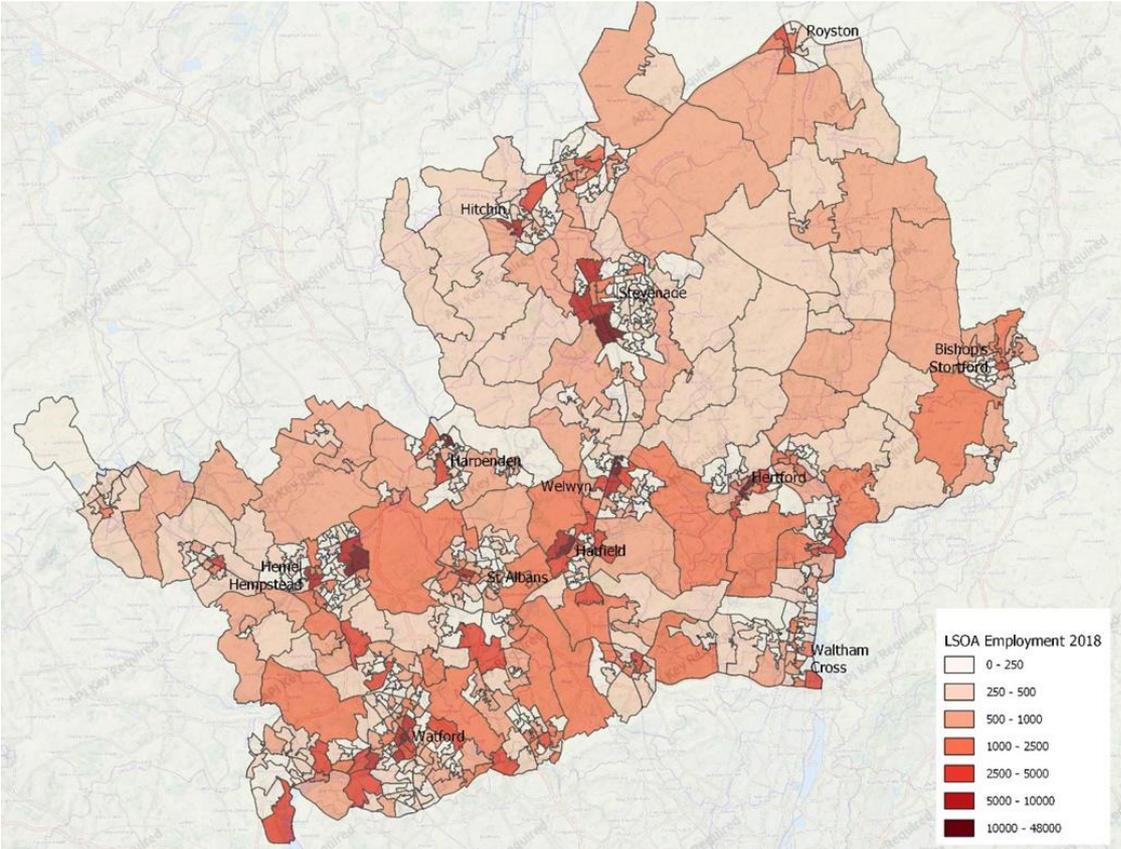
- 3.2.5 The data presented in **Table 3.1** highlights a number of key findings. Firstly, the top two sectors (Business Administration & Support Services and Professional, Scientific & Technical) represent almost one third (29%) of all employment in Hertfordshire. Both sectors have grown considerably across the 2015-18 period (23%) adding around 36,500 jobs in this time. Of significant relevance to this study, these sectors are also important occupiers of both office and light industrial employment space.
- 3.2.6 Secondly, the table also indicates that all sectors other than Retail have at least maintained their employment levels between 2015 and 2018, with seven expanding, two remaining static (Manufacturing and Information & Communication) and one contracting (Retail). These data suggest healthy growth amongst key Hertfordshire sectors, especially those which are important in relation to the employment space offered in key locations.

⁹ See, for example, HCA, Employment Density Guide, 3rd Edition, 2015

Spatial Distribution of Employment

- 3.2.7 In order to understand the location and distribution of employment sites, it is important to understand the distribution of employment across the County. This is summarised in **Figure 3.1**, which presents the level of employment in all Lower Super Output Areas¹⁰ (LSOAs) in Hertfordshire. Labels are used to identify key towns across the County.
- 3.2.8 **Figure 3.1** shows that the LSOAs with the highest levels of employment are located in Stevenage, Hertford, Welwyn, Harpenden, Hemel Hempstead, Hatfield and Watford. The map also demonstrates the importance of town centres as locations for employment. Towns such as Watford, Hatfield and Hertford have their highest employment concentrations located in the LSOAs that cover the town centre. Other locations, such as Stevenage, Hemel Hempstead, Welwyn Garden City and Harpenden, have higher concentrations of employment located in LSOAs which are outside, but often adjacent to, their town centres. This is an important consideration, given the recent trends in office space loss and the realisation that locations which are adjacent to amenities and town centres potentially face a higher risk of office-to-residential conversion through PDR.

Figure 3.1 Spatial Distribution of Employment



Source: Ortus Economic Research analysis of BRES and ONS LSOA boundaries

¹⁰ These are one of the smaller census geographical areas, LSOAs have an average population of 1500 people or 650 households.

Quantitative analysis of the 10 districts

- 3.2.9 Following on from the analysis of key economic indicators across the County, this section focuses in on district-level analysis. This is important to ensure that the study reflects the different economies and spatial contexts of each of the ten districts that make up the County.
- 3.2.10 **Table 3.2** displays employment data for 2015, 2018 and the change between those dates for each district. It shows a mixed picture, with significant growth experienced in East Hertfordshire (32%), Welwyn Hatfield (31%) and Watford (22%). Whilst some districts have seen more modest growth or employment levels remain largely stable, the data suggest a large decline (-17%) in Broxbourne¹¹.
- 3.2.11 The data that underpins this analysis should be treated with caution, however. There is a degree of scepticism regarding the accuracy of such data particularly when it comes to representing trends over time or sectoral employment. This matter is discussed at some length in the South West Herts Economic Study¹² and was raised at the workshop that was undertaken with representatives of local districts as part of this study. Having said that, it is known that a large employer did leave Broxbourne during this period (Tesco) though the amount of employment affected by this event is considered to be lower than the BRES seems to contain¹³.
- 3.2.12 The analysis should therefore be treated as indicative only, rather than a definitive statement of trends over recent years¹⁴.

Table 3.2 Employment Trends by District

LAD	2015	2018	Change	% Change
Broxbourne	42,000	35,000	-7,000	-17%
Dacorum	66,500	72,000	5,500	8%
East Hertfordshire	64,000	84,500	20,500	32%
Hertsmere	54,000	55,000	1,000	2%
North Hertfordshire	53,000	54,000	1,000	2%
St Albans	77,500	76,500	-1,000	-1%
Stevenage	44,000	46,000	2,000	5%
Three Rivers	43,500	44,000	500	1%
Watford	85,500	104,500	19,000	22%
Welwyn Hatfield	71,500	93,500	22,000	31%
Column Total	602,000	665,500	63,500	11%

Source: Ortus Economic Research analysis of BRES data (ref: W3/S1)

¹¹ This may partly be as a consequence of a change in location of Tesco Headquarters from Broxbourne to Welwyn Garden City

¹² See, for example, https://www.watford.gov.uk/downloads/download/967/south_west_herts_economic_study_update_2019

¹³ This is the conclusion of officers from the local authority involved who have investigated the data and how it represents this event

¹⁴ Note that it was suggested that this study should utilise employment trends presented in existing studies (e.g. employment land studies and the SW Herts Economic Study). However, when an attempt was made to do so, it became apparent that these studies lacked consistent, comparable data at the level of all 10 districts.

Note on data interpretation

The South West Herts Employment study presented adjusted estimates for employment trends for the South West Herts area. It comments on a “number of inaccuracies in employment datasets for South West Herts which result in significant overestimates of the number of jobs in the... area”. Unfortunately, that report does not provide an analysis of the adjusted historic employment trends at the local authority level. The underlying data being commented on within that report is the East of England Forecasting Model (EEFM) which itself relies on ONS data. The ONS datasets (including BRES, from which the data in Table 3.2 is drawn) are known to present issues when employed to understand trends at relatively small spatial areas, for a number of reasons (including but not limited to the protocols related to how employment is allocated to individual business sites in large distributed firms). The data in Table 3.2 suggest that three areas (East Hertfordshire, Watford and Welwyn Hatfield) have experienced significant employment growth between 2005 and 2008, and that Broxbourne has seen a significant decline. These results are reflective of the underlying data but suggest extraordinary trends in these four areas. Local partners should interpret these results as they see fit and in light of their extensive local knowledge. The estimates are employed for the purposes of this study as they represent the most credible source of such data, notwithstanding the known issues commented on here.

Current evidence of the relationship between demand and supply

3.2.13 The rationale for undertaking this study is to a large extent on evidence presented regarding trends in the supply of employment space across Hertfordshire and in recent years. The key evidence base is provided in the LSH report entitled ‘Loss of Employment Space in Hertfordshire - Study into extent, implications and solutions’ published in 2019. Key findings from this report include:

- Research with representatives of the property market found that there is healthy underlying demand in both the office and industrial sectors across Hertfordshire.
- The sectors that Hertfordshire performs well in – the life sciences, agri-tech, advanced engineering and manufacturing, sustainable construction and the creative industries - are leading this occupier demand, as well as driving pent-up demand in the SME market in particular.
- However, Hertfordshire has seen a major haemorrhaging of commercial floorspace in recent years. Almost a quarter of the office stock has been lost over the last decade, and for some local authorities it has effectively halved.
- In total, there has been a net loss of over 771,000 sq. m. of commercial floorspace across Hertfordshire over the last decade. This is equivalent to the total office stock in St Albans, Watford and Welwyn Garden City combined.
- There has been a net loss of approximately 407,820 sq. m. of office floorspace over the past decade. Despite gains of approximately 230,040 sq. m. of office floorspace over this period, this was off-set by the loss of almost 637,900 sq. m. of office

floorspace. The main locations of net loss have been Dacorum, Welwyn Hatfield and Watford.

- The industrial sector has not seen a net loss to the same extent as the office sector. Approximately 7% of the industrial floorspace stock was lost over the period 2008-09 to 2017-18, whilst employment increased by 1.5% in the sector. However, the nature of this market requires larger scale developments to meet future needs, so losses of industrial floorspace without suitable replacement space will create problems for the successful operation of the market.
- There has been a net loss of approximately 370,500 sq. m. of industrial floorspace over the past decade. There were gains of approximately 550,000 sq. m. of industrial floorspace over this period, but this was off-set by the loss of almost 920,480 sq. m. of industrial floorspace. The main locations of net loss have been East Hertfordshire, Stevenage, Three Rivers, Dacorum and St Albans.
- One of the key contradictions identified in the evidence is that whilst supply of employment space has declined, office-related employment has grown by over 19% over the same period.
- Some of the decline in office space can be attributed to the repurposing of poor quality and empty or under-used office properties and it is also acknowledged that the nature of work has changed over the last decade, influencing the scale and type of demand.
- A key conclusion of the report, however, is that the scale of the divergence between office loss and employment growth in Hertfordshire is putting major pressure on businesses.
- Furthermore, the report indicates that the decline in employment space is set to continue. Further office PDR floorspace loss is anticipated as a result of PDR approvals which are yet to be implemented. These outstanding PDR office to residential conversions are equivalent to almost 80% of the total amount of floorspace lost via PDR over the period 2013-14 and 2017-18, so will reduce the office floorspace stock further.
- In some local authorities in Hertfordshire this is equivalent to the total scale of loss of office floorspace to residential seen over the last five years. This will seriously impact the efficient, effective and sustainable operation of city and town centres as economic growth locations, especially for the creative and knowledge-based economy.
- A particular concern is over the loss of small units, which has been driven by PDR conversions to a noticeable extent. These units are central to the needs of the SME business community, and the loss and lack of availability of such units is seen as a major limitation to the growth potential of this sector. This is both in terms of start-up and grown-on businesses within Hertfordshire, and for inward investment opportunities.

3.2.14 **Table 3.3** below presents data from the LSH report related to the supply of office space across the period 2008/9 to 2017/18. It demonstrates how the reduction in office space has not occurred uniformly across the County, with districts such as Hertsmere (32%), Welwyn Hatfield (28%), St Albans (27%) and Broxbourne (27%) experiencing the largest declines in percentage terms.

Table 3.3 Net Change in Office Supply

	Net Change (sqm)	Adjusted Stock 2017-18 (sqm)	Stock Change 2008-9 to 2017-18
Broxbourne	-21,047	55,953	-27%
Dacorum	-61,844	248,156	-20%
East Hertfordshire	-35,462	140,538	-20%
Hertsmere	-63,722	134,278	-32%
North Hertfordshire	-31,744	105,226	-23%
St Albans	-58,547	154,453	-27%
Stevenage	-14,645	134,355	-10%
Three Rivers	-2,932	150,068	-2%
Watford	-35,041	195,959	-15%
Welwyn Hatfield	-82,802	218,198	-28%
Total	-407,786	1,537,184	-21%

Source: LSH

- 3.2.15 A key implication arising from this and other analysis presented in the LSH report is that some locations (e.g. North Herts and St Albans) have office vacancy equivalent to around half a year's supply. This is an indicator of how tight the office market is in these locations, presenting a major constraint on economic growth.

3.3 Predicted Future Demand – Employment

- 3.3.1 Having considered the current economic position for Hertfordshire and some contextual evidence related to the supply of employment land, particularly office and industrial space, this section now examines evidence of potential future demand. As before, employment is used as the key indicator.

Strategic direction – the SEP and LIS

- 3.3.2 The first consideration relates to the strategic direction and ambition for the Hertfordshire economy, as expressed by Hertfordshire LEP as the key strategic economic development body for the County. Interestingly, the Strategic Economic Plan¹⁵ establishes no clear targets or objectives related to growth rates and the scale and shape of the future Hertfordshire economy. However, the LIS consultation document¹⁶ does present two scenarios which are relevant to the consideration of Hertfordshire's economic 'direction of travel'.
- 3.3.3 The LIS is focused on productivity growth and how Hertfordshire can support national ambitions for growth in strategic sectors. The document acknowledges the challenges associated with a decline in the supply of office and industrial employment space, as discussed above, and it also identifies key implications such as the potential constraints now

¹⁵ Hertfordshire LEP – Perfectly Placed for Business: The refreshed Strategic Economic Plan: 2017–2030, July 2017

¹⁶ Hertfordshire LEP – Hertfordshire Local Industrial Strategy: draft for consultation, September 2019

faced by start-up, SME and scale-up businesses (i.e. the need to ensure provision of grow-on space in order to retain growing businesses within the County). It also acknowledges the need for town centres to reinvent themselves in response to the challenges that high streets are facing, particularly related to bricks and mortar retail.

3.3.4 The LIS presents two potential economic scenarios for Hertfordshire, looking forward. These are:

- Scenario 1 – Hertfordshire fulfils its role in the Golden Triangle
- Scenario 2 – Hertfordshire facilitates London’s growth

3.3.5 Interestingly, the second scenario anticipates that employment land will continue to be lost. We know from the LSH evidence that this is likely to indeed be the case over the short term as existing PDR approvals are implemented. One might conclude, therefore, that even if the preference is for Scenario 1, if the loss of employment space is not addressed, then the economic future of the County may to a large extent become pre-determined. Certainly, each scenario implies differing strategies around employment land.

3.3.6 The LIS also sets out (draft) recommendations relating to employment land:

- ensure a better supply of grow-on space across Hertfordshire, enabling easy scale-up from micro to larger enterprises
- Developing employment space on Gunnels Wood Road (and nearby) to align specifically to the needs of the cell and gene therapy cluster and its wider supply chain
- providing branded “makerspace” within the “science corridor” from Hatfield to Stevenage and Letchworth Garden City
- Identify the synergies and complementarities between the two enterprise zones at Hemel Hempstead and in Harlow (with links to major housing growth at Hemel Garden Communities and Gilston), and work collaboratively to promote both, including to inward investors
- Support the creative cluster in south west Hertfordshire (with Warner Bros., BBC, University of Hertfordshire and others) to develop a plan for growth

3.3.7 Animate the development of the offsite construction sector, drawing on the expertise of BRE and the possibilities and potential of the enviro-tech-focused Hertfordshire IQ enterprise zone Other ‘Place’ related draft recommendations include:

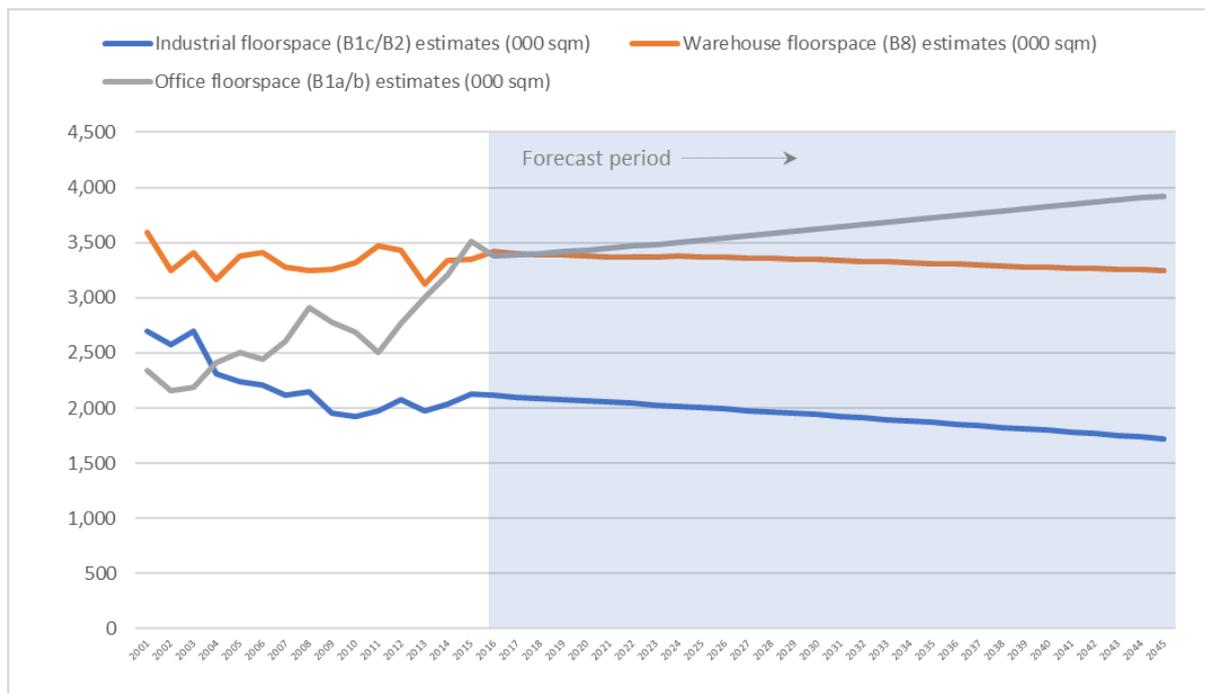
- Promote Gilston and Hemel Garden Communities as exemplary, enterprising, creative and digitally enabled communities
- Continue to deliver the vision for Stevenage Central with links this to employment provision on Gunnels Wood Road
- Deliver new economic visions for Letchworth Garden City with a strong focus on enterprise and creativity; and for Hatfield town centre (Hatfield 2030)
- Develop an intelligent and ambitious vision for Park Plaza
- Advance plans for Watford Junction
- Support the development of town-level creative/cultural strategies

- 3.3.8 While it is difficult to predict the impact of new technologies such as Artificial Intelligence (AI), Hertfordshire has some key firms at the forefront of this type of technology, including Ocado. The report discusses in Section 4 how the changing world of work may impact on future working patterns.

Floorspace Forecasts

- 3.3.9 Formal economic forecasts have been prepared for Hertfordshire through the East of England Forecasting Model. We note that some reservations have been expressed during stakeholder consultation and in other local employment studies on the accuracy of this data, particularly at the local level.
- 3.3.10 This data source indicates that workplace jobs in Hertfordshire (i.e. jobs located within the County) is forecast to rise by 28,000 between 2019 and 2029 (6%), compared to a predicted growth in population of 8%. These forecasts also suggest that net out-commuting will also rise. The forecasts are of course heavily informed by recent trends so it is important to understand that trends can be influenced through policy, and a strategy to support Scenario 1 above would need to consider carefully how to balance the provision of space for jobs within Hertfordshire with the role that the County serves in providing labour to other locations such as London.
- 3.3.11 **Figure 3.2** presents a forecast for floorspace across three key floorspace categories: office (B1a/b), industrial (B1c/d) and warehouse (B8). This forecast is driven by employment forecasts at the sectoral level that sit within the model and are derived through a mapping of sectoral activity to land use classes. The forecasts suggest that based on future predictions for office-based employment, the volume of office space required in Hertfordshire will grow considerably. It is important to remember that this forecast is predicated on the assumption that out-commuting will grow, so Hertfordshire office stock will need to grow in order to accommodate the jobs forecast regardless of that assumption.

Figure 3.2 Floorspace Forecasts



Source: EEFM

3.3.12 The forecasts also suggest that the requirement for industrial and warehouse employment land will decline over the next 25 years, reflecting a continuation of the shift in the Hertfordshire economy to being increasingly service-led.

Projections from published land studies

3.3.13 Another important source of data on employment and floorspace projections is the range of published studies and reports that the local authorities have commissioned to support their economic development and planning functions. These include the South West Herts Economic Study of 2019 and individual employment land studies for the five other districts. As expected, this exercise has proven challenging due to the differing periods covered, the different publication dates and the approach taken to data presentation. However, drawing directly on published statistics or creating estimates based on them where necessary, it has been possible to develop estimates for projected jobs growth to 2031 for each of the ten districts.

3.3.14 **Table 3.4** set out these estimates of projected jobs growth to 2031 and an interpretation of these figures with respect to requirements for future office space, taking into account existing office commitments.

3.3.15 The table indicates that across the County, these studies infer that an additional 64,770 jobs will be created by 2031. Existing data suggests that approximately 52% of Hertfordshire

employment is located in office accommodation and this proportion has been used¹⁷ to calculate that approximately 33,800 jobs will be created in office-based activities and sectors. Welwyn Hatfield and Broxbourne are due to experience the highest level of growth in office jobs in this period.

- 3.3.16 Based on the assumption that employment densities will be 10 sqm per employee, the data suggests that 338,000 of office accommodation will be required to satisfy this growth in office jobs. Considering existing commitments (after planned losses) drawn from the LSH report, the table then indicates the amount of additional office floorspace required to meet the need inferred from the jobs forecast.
- 3.3.17 The analysis presents a mixed picture, with some locations (Watford, Three Rivers) due to increase office space on the basis of allocations which exceeds the demand implied by the data on likely employment growth in office based jobs. However, for the majority of districts, the data suggest that an additional volume of office space will be required in order to accommodate the projected growth, with the largest additional requirements being in St Albans (53,190 sqm) and Broxbourne (37,800 sqm).

Table 3.4 Potential Future Office Demand

	Projected Jobs growth to 2031	Office jobs growth to 2031	Estimated requirement sqm to 2031	Total office commitments (after planned losses) sqm	Additional requirement sqm
Broxbourne	7,500	3,900	39,000	1,200	37,800
Dacorum	4,000	2,100	21,000	-7,670	28,670
East Hertfordshire	9,700	5,100	51,000	11,950	39,050
Hertsmere	3,200	1,700	17,000	-8,140	25,140
North Hertfordshire	3,570	1,900	19,000	-4,890	23,890
St Albans	5,900	3,100	31,000	-22,190	53,190
Stevenage	4,100	2,100	21,000	11,230	9,770
Three Rivers	4,700	2,500	25,000	36,360	-11,360
Watford	6,800	3,500	35,000	53,100	-18,100
Welwyn Hatfield	15,300	8,000	80,000	11,100	68,900
Total	64,770	33,800	338,000	82,050	255,950

Source: Ortus Economic Research analysis of the LSH report, Employment Land Studies and SW Herts report (Ref: W6/S1)

¹⁷ No assumption has been made related to likely future continuation of the shift towards service-led economies, so this estimate should be considered as conservative

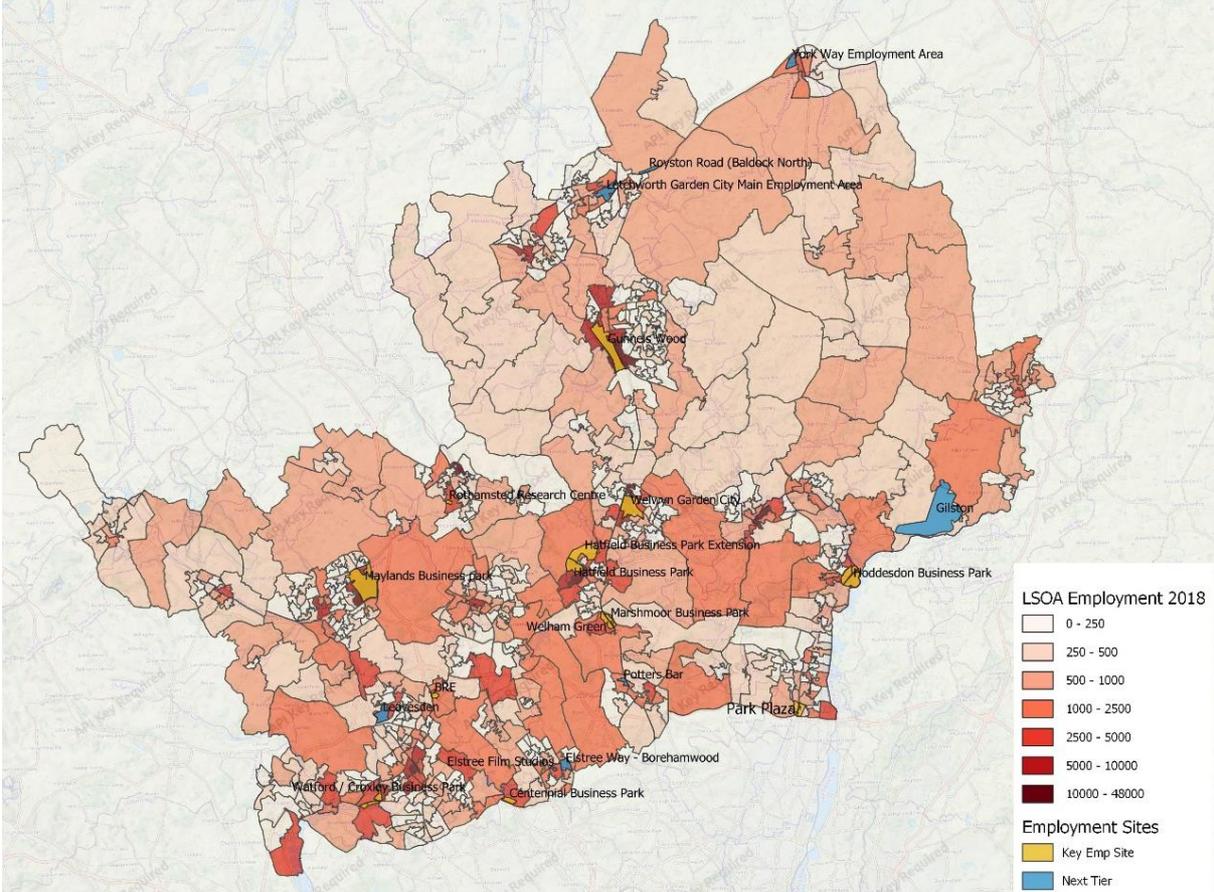
- 3.3.18 The key conclusion from this analysis is that given projections for future jobs growth and the number of those jobs that are likely to require office accommodation, the County will need 256,000 sqm of additional office space beyond existing allocations in order to meet demand.

3.4 Economic Role of Key Employment Sites

- 3.4.1 Having looked at the key economic characteristics of Hertfordshire and the future direction of travel (and implications for employment land requirements), this section focuses on an assessment of the relationship between key employment sites and the economy of Hertfordshire. This relationship is of course expressed through the nature of the businesses that occupy key sites and the activities that they undertake. This section should therefore be considered alongside other evidence presented in this report, in particular **2.5 Key sites - accessibility and qualitative factors summary** which reviews the characteristics of sites and other supply side factors.
- 3.4.2 Hertfordshire LEP has identified 17 key employment sites, split into two categories – ‘key sites’ (i.e. existing sites of current scale and importance) and ‘next tier sites’ (expanding and emerging sites).
- 3.4.3 The analysis presented in this section is based on a mapping of employment to key sites using BRES data at the LSOA level. This is as much an art as a science as the employment site boundaries are not coterminous with LSOAs. A ‘best-fit’ approach has therefore been taken, and employment data has been moderated and smoothed in order to create a working estimate of the scale and type of employment on each site¹⁸. Were it the case that comprehensive data on the companies that occupy the key sites were available (e.g. through non-domestic rates datasets), then a more detailed and potentially more accurate exercise could be undertaken. Such data were not available to this project, however, so a method was generated which suited the available data.
- 3.4.4 **Figure 3.3** below identifies the 17 key employment sites, categorised as ‘key’ and ‘next tier’, mapped alongside the distribution of employment presented earlier. It shows that many of the key employment sites overlap with LSOAs with high numbers of employment, which hints at the importance of these sites in terms of the employment that they contain.

¹⁸ One issue experienced, for example, is the challenge of mapping SICs to specific institutions/organisations. For example, employment within the BRE site is not allocated to a construction SIC, it is allocated to an SIC for management consultancy. This is as much an issue with the allocation of businesses and organisations to single activity definitions through the SIC system as it is an issue with the data sources themselves.

Figure 3.3 Employment Concentrations and Key Employment Sites



Source: Ortus Economic Research analysis of BRES and ONS LSOA boundaries

- 3.4.5 The analysis estimates that approximately 129,000 jobs are located at the 17 key employment sites, representing 19% of all employment in the County. There are some very large sites in terms of employment, such as Welwyn Garden City (30,000), Gunnels Wood (18,000) and Maylands Business Park (18,000).
- 3.4.6 An assessment of absolute scale should be considered alongside consideration of the relative importance of sites to the local economies in which they are situated. This is presented in **Figure 3.4**, where each site has been given a score of between -5 and 5 regarding two parameters; the significance of the site as a location of employment (based on the proportion of local authority total employment that they contain) and the scale of the site (based on the total amount of employment located on the site). The scores are not provided as a judgment of the absolute significance or scale of the site, but purely as a comparative measure across the 17 sites. So, for example, Gilston and Rothamsted provide *comparatively low proportions* of the total employment within their local authority areas, when assessed against all other sites, whereas Welwyn Garden City provides a *comparatively high proportion*.
- 3.4.7 The data which underpin the analysis presented below can be found below in **Table 3.5**.

Table 3.5 Employment Scale and Significance by Key Employment Site

Key site	LAD	Estimated employment 2018	% of LAD Emp
BRE	St Albans	1,100	2%
Centennial Business Park	Hertsmere	3,200	6%
Croxley Business Park ¹⁹	Three Rivers	5,000	12%
Elstree Way	Hertsmere	4,100	8%
Gilston	East Hertfordshire	400	1%
Gunnels Wood	Stevenage	18,300	41%
Hatfield Business Park	Welwyn Hatfield	11,100	12%
Hoddesdon Business Park	Broxbourne	8,200	24%
Leavesden	Three Rivers	1,800	4%
Letchworth Garden City	North Hertfordshire	8,400	16%
Marshmoor Business Park	Welwyn Hatfield	2,800	3%
Maylands Business Park	Dacorum	18,800	27%
Park Plaza	Broxbourne	1,000	3%
Potters Bar	Hertsmere	2,100	4%
Rothamsted	St Albans	1,000	1%
Watford Business Park ²⁰	Watford	7,200	7%
Welwyn Garden City	Welwyn Hatfield	29,600	32%
York Way	North Hertfordshire	4,300	8%
All Sites		128,500	

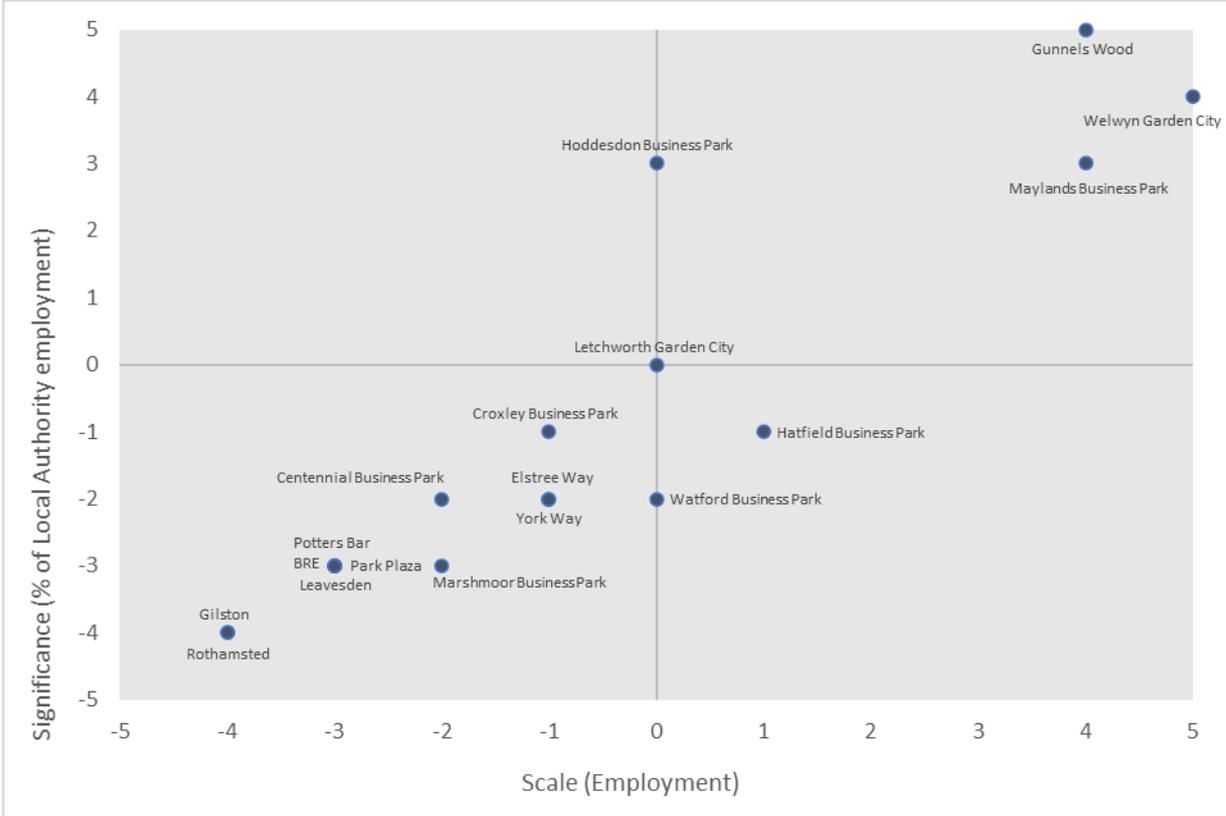
3.4.8 **Figure 3.4** shown below suggests the following key findings:

- 13 sites could be considered to be of comparatively small scale compared to the other six (i.e. on or to the left of the vertical axis),
- One site (Hatfield Business Park) is rated as comparatively large but not comparatively significant (as it appears below the horizontal axis); and
- Three sites – Gunnels Wood, Welwyn Garden City and Maylands Business Park are rated as both large in scale and very significant as locations of employment compared to the other sites.
- Park Plaza, whilst currently comparatively small in terms of the employment located on the site, has significant potential for future expansion and therefore may become a more significant employment location in the future.

¹⁹ Part of Croxley/Watford Key Employment Site, but data split for this table

²⁰ As footnote 19.

Figure 3.4 Scale and significance of Employment by Key Employment Sites



Source: Ortus Economic Research analysis of BRES data (Ref: W1/S1)

3.4.9 What is clear from this assessment, and from discussions with the steering group and other stakeholders, is that certain sites are highly specialised in terms of the organisations that are located on them. It is this specialisation, and the associated differentiation which leads from these specialisations, which leads to the site being considered of importance to the Hertfordshire economy.

3.4.10 Building on this point, **Table 3.6** identifies the relationship between the five strategic sectors identified within the Hertfordshire LEP Strategic Economic Plan and the 17 key employment sites, by identifying the site which is more relevant to the strategic sector. The assessment of relevance is largely driven by the acknowledgement of the presence of a small number of strategically important companies and organisations. For example, the Rothamsted Research Centre, BRE, the Stevenage Bioscience Catalyst at Gunnels Wood, the presence of Airbus Defence and Space and MBDA on Gunnels Wood and the presence of Warner Brothers Studios at Leavesden.

Table 3.6 Strategic Sectors and Key Employment Sites

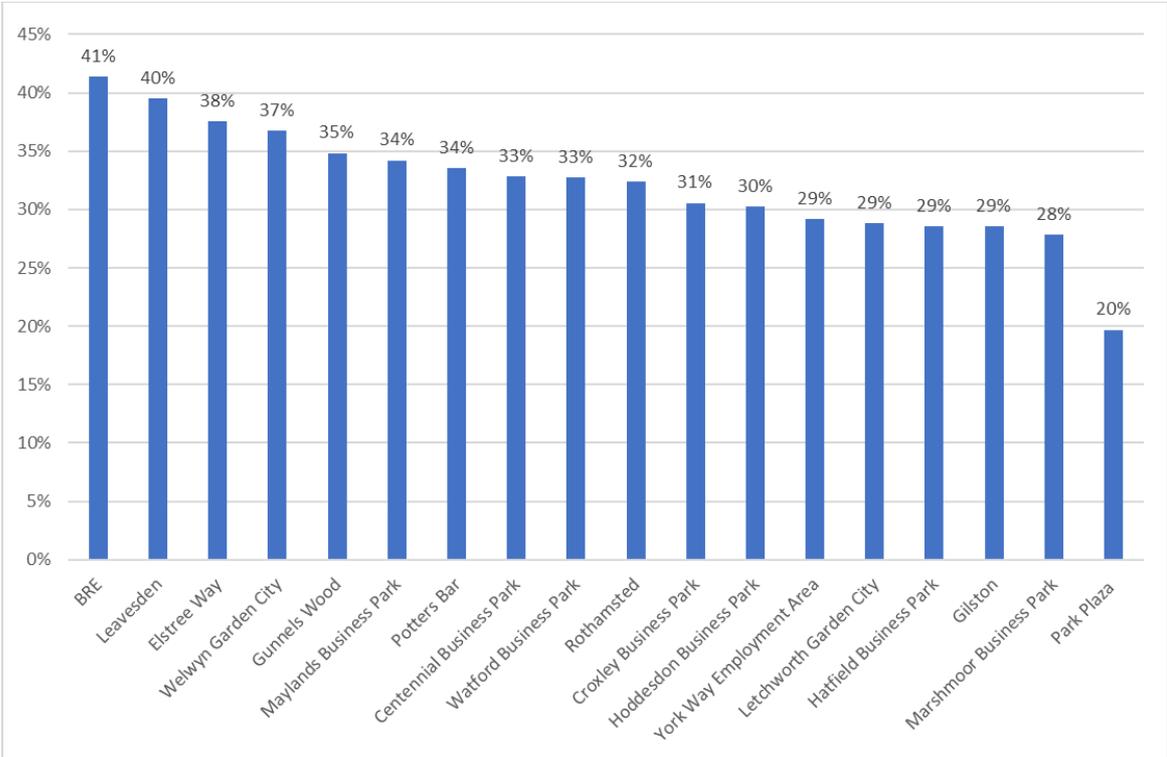
Strategic sector	Key employment sites
Agri-science and Agri-tech	Rothamsted
Sustainable Construction	BRE
Life sciences	Gunnels Wood

Strategic sector	Key employment sites
Advanced Manufacturing/Engineering	Gunnels Wood
Creative industries (Film, TV and digital)	Leavesden

Source: Ortus Economic Research

3.4.11 Further analysis of the employment and sectors present on the key sites allows us to assess the employment space mix of each site. **Figure 3.5** sets out data related to the proportion of employment that is estimated to be located in office accommodation, on each of the 17 employment sites. It shows that the location with the highest proportion of employment in office accommodation is BRE (41%), whilst the site with the lowest proportion is Park Plaza (20%). This analysis provides an insight into the nature of the employment space available on these sites, the extent to which they are built out and the types of economic activities and sectors that operate from them.

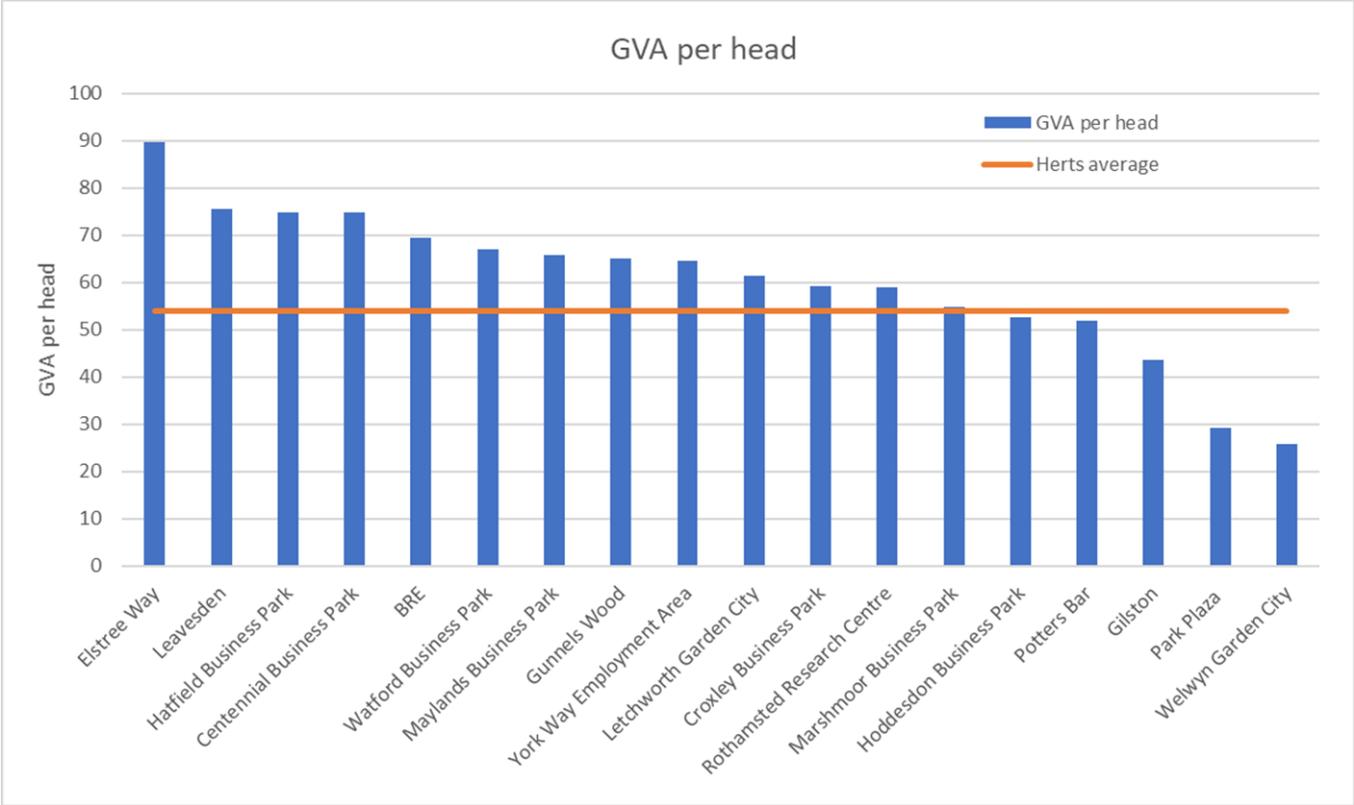
Figure 3.5 Site Employment in Offices by Key Employment Site



Source: Ortus Economic Research analysis of BRES data (Ref: W1/S2)

3.4.12 The final analysis also reflects the sectoral mix of occupiers on the key sites, through an examination of the levels of GVA per employee represented on each of the key sites. This analysis combines employment levels by sector with GVA per employee data by sector. **Figure 3.6** shows that 13 of the 17 sites are at or above the GVA per employee average for the County. This emphasises the strategic importance of the sites as locations for high value employment. However even though some of the key sites are below the average, they still provide valuable employment opportunities. The employment and jobs mix on these five sites is somewhat different from the other locations and is also expected to change in future with growth here. This emphasises that any strategy should recognise the different roles of employment sites and should take a segmented approach to their development.

Figure 3.6 GVA per Employee Across Key Employment Sites



Source: Ortus Economic Research analysis of BRES and ONS GVA per employee data (W2/S1)

3.5 Summary and Conclusions

3.5.1 The assessment of demand and future employment trends, presented above, identifies the following key findings:

- The economic indicators suggest that Hertfordshire is home to a healthy, growing economy.
- However, significant loss of employment land has been experienced (particularly office accommodation) and the forecasts suggest that this will continue in the short term. This is likely to place a significant constraint on economic growth.
- A strategic decision about the future ambition for and role of the Hertfordshire economy must be made in order to determine how assets such as employment land are managed in order to support the objectives that flow from this decision.
- Scenario 1 from the LIS consultation is undeliverable without a determined approach to not only retain but also develop additional employment land in Hertfordshire, particularly in the area of office and industrial accommodation given the current and potential future strengths of the economy.
- The 17 employment sites differ in the strategic role and the opportunity they present to support future growth strategies.
- The review of these 17 sites should not constrain thinking around the key locations for employment and economic activity across the County.

- Other key employment locations such as town centres should also be considered as important employment sites (in the sense of being economic hubs) and whilst bricks and mortar retail is likely to continue to face pressures, opportunities to increase the density of economic activity in town centres should be considered as part of a forward strategy.
- The data suggests that 8 out of the 10 districts in Hertfordshire are facing a challenge to supply sufficient office space to accommodate growth planned or predicted in key planning documents.

3.5.2 These findings have a number of implications for the future strategy, as set out in Table 3.7 below.

Table 3.7 Implications from demand assessment

Issue	Implications for strategy
Demand and supply are closely matched, particularly in some desirable locations (e.g. St Albans)	Future economic growth in Hertfordshire is reliant on adequate supply of suitable premises. Protection and appropriate development of key employment sites should be a prominent part of any forward strategy.
There are a number of ‘key’ employment sites but many other important locations for economic activity	The strategy should ensure that all employment space is valued and ‘curated’ so that it meets the evolving needs of the Hertfordshire economy.
Sectoral profiles change over time, but slowly	Generally speaking, the sectoral profile of a local economy evolves relatively slowly. This provides planners and policy makers with time needed to make informed assessments. However, predicting future economic trends is notoriously difficult and fraught with risk. Development which recognises this risk and can offer flexibility in terms of use should be encouraged.
Office locations adjacent to amenities and town centres are particularly vulnerable	They are also important assets for the local economy. Finding mechanisms to protect them is crucial.
Specialisation can add competitiveness to local economies	As well as targeting high value jobs, productivity uplift and so on, ensuring that the Hertfordshire economy builds on existing, and develops new specialisms is key to enhancing economic vibrancy and opportunity. This should be considered across the strategy for employment sites moving forward.

4. Strategy & Action Plan

4.1 What are the key principles a Strategy should address?

The major employment sites are significant, but it's not just about them

- 4.1.1 Hertfordshire sets considerable store by its major employment sites, which tend to be viewed as the 'poster child' for what employment in the County stands for – iconic buildings in prominent locations, and the major focus of the 'big five' Hertfordshire employment specialisms which are identified later.
- 4.1.2 Protection and enhancement of these sites has long been held as a key focus for those engaged in promoting business innovation and investment in Hertfordshire; the 2012 Key Sites report (which we summarise later) may have had its focus on different imperatives – the need for an immediate response to the global financial crisis and the challenges to come from the years of austerity that were just starting – but many of its principles still hold dear; nearly all of the business locations deemed critical to Hertfordshire's economy are still so today.
- 4.1.3 However, it is worth remembering that the majority of employment activity is conducted outside what we would define as Key Sites – as much as 80%. The Strategy and Action Plan needs to acknowledge and respond to this, by providing some flexibility in considering investment and promotion at sites that are not shown as key sites, in particular in town centres which contain many jobs.

Future actions must fulfil the twin objectives of future proofing existing 'valued' employment locations to both preserve and enhance them, whilst at the same time setting parameters for new opportunities.

- 4.1.4 It is important not to view Hertfordshire's principal business locations being entirely cast in stone but instead recognise the dynamics of change, with existing locations being redefined for other uses where appropriate and new locations coming forward, identified within Local Plans.
- 4.1.5 Current and future generations of Local Plans are defining new opportunities – for instance Harlow and Gilston Garden Town, Hemel Garden Communities, whilst in recent years, the former Shredded Wheat site in Welwyn Garden City and the former Tesco site in Cheshunt are both being lost to housing-led regeneration. This is a process that will continue; the key thing is to recognise that dynamic forces are at work.

We do not define a 'right' or 'wrong' quantum of employment land in Hertfordshire within the Strategy and Action Plan

- 4.1.6 It is beyond the scope of this study to put a definitive target on the amount of employment space the County needs for any given point in the future. The *LSH Loss of Employment Space in Hertfordshire* (2019) charted current trends, and there are - and will be – ongoing studies

to set a requirement of employment land needs in the future (such as the South West Herts Economic Study) as this remains a key component of any emerging Local Plan.

- 4.1.7 This Strategy and Action Plan sits, we believe, somewhere between the two spheres – acknowledging there is a continuing trend of employment space loss that needs to be addressed, and setting out a template of how to protect, improve, expand and create the best employment spaces in the county once overall quantum has been established through separate technical work. The technical work we envisage is identified in a series of interventions set out in paragraph 4.6 below. The LEP and its partners would need to agree which organisations would need to be involved in these activities and who would lead them. We think this is an area in which the Herts Growth Board should seek to determine roles and responsibilities

We do not suggest generic interventions; instead, we propose that bespoke solutions, based on the character, scale and location of each site should be pursued

- 4.1.8 A key facet of Hertfordshire’s employment sites is their heterogeneity, and depending on their individual characteristics, interventions specifically targeting those characteristics are required. This has involved the Strategy and Action Plan defining employment site typologies as a basis for targeted actions.

We have specific concerns relating to the strategic employment elements relating to major new settlements (that would also be applicable to Sustainable Urban extensions)

- 4.1.9 Of the 17 Key Employment Sites identified in this report, only one is an emerging employment location associated with a major new settlement – Gilston. A significant area of employment land has been identified in the masterplan and East Herts District Plan 2018 as part and parcel of sustainable development proposals at this location. There is, however, no certainty that “on the ground” employment development will match future housing rollout; in such circumstances, employment land allocations could be put under pressure to make way for additional housing development to meet future housing growth needs.
- 4.1.10 We think there is considerable merit in exploring ways in which the Gilston employment allocations can be successfully promoted in order to allay any such concerns, and as such, we identify this as a priority in our Action Plan recommendations below. (Any outcomes from this work could provide a template for similar future allocations, or where employment allocations at a sub Key Employment Site scale have been identified in Hertfordshire’s SUEs).

We should consider ‘alternative workplace scenarios’ even though we can’t be altogether certain of the future

- 4.1.11 There is almost certainly a danger in assuming past employment practices may be the practices of the future. They could be, but that is a highly questionable assumption.

4.1.12 In this Strategy and Action Plan three scenarios are explored, two of which are very different from what some might categorise as ‘the norm’. In truth, there has never been long term stability in employment practices, and it is important to recognise that circumstances could be so very different in years to come, through transformative technical and cultural changes.

4.2 What typologies can we define?

4.2.1 There are many ways Hertfordshire’s employment sites can be defined, but this Plan considers that there are three principal characteristics:

- Where they sit on the build out spectrum – are they allocated but not yet developed (or not significantly so?); are they only partially developed, with significant investment opportunities; or are they substantially or wholly built out, with new businesses only able to take up occupancy if another moves out?
- Their overall size – small medium or large?
- What opportunity do they offer; can they be enlarged or merged with adjoining activities to achieve a greater economy of scale; can access be upgraded, or are there significant passenger transport initiatives being planned which they would greatly benefit from?

4.2.2 The following matrix sets out a way of defining employment site typologies:

Table 4.1 Employment Site Typologies

Main Criteria	Defining Characteristic		
Maturity	Fledgling	Maturing	Mature
Scale	Small	Medium	Large
Opportunity	Limited opportunities	Some opportunities	Substantial Opportunities

4.2.3 There are a host of permutations which can define any employment location; one site could be large, recently established with a host of opportunities; another might be small, mature and have limited opportunities. Between these two there are a range of combinations; what we would suggest that depending on a location’s maturity, scale and degree of opportunity there are a targeted set of interventions which could be of value in protecting and enhancing them. We can however define likely interventions based on individual typologies:

- a fledging Key Site potentially offers a ‘clean slate’ opportunity to establish a key set of investment opportunities and mix of activities. There may be difficulties in putting the necessary infrastructure investment in place (e.g. access/services) which may in turn depend on development interest, and it may be necessary to undertake some pump-priming investment to spend time and effort promoting the site around an agreed set of objectives.
- in contrast a mature Key Site – one wholly or substantially occupied - may initially lend itself to iterative changes, unless there is the prospect of a rapid turnover of businesses or an action (such as the potential for improved access arrangements, or enhanced

facilities such as innovation centres and environmental improvement) that can expedite beneficial changes.

- whilst economies of scale may prove to be important, many small Key Sites such as BRE Watford or Rothamsted can be seen as punching above their weight, so size is not necessarily the defining characteristic for interventions. The larger scale Key Sites will however tend to offer themselves to a suite of initiatives, depending on other factors.
- of these defining characteristics individual Key Site “opportunities” is likely to be the biggest criteria which will drive interventional change, and later in the report we examine all 17 to see which of the interventions we have identified might be the most appropriate.

4.3 Key Interventions

4.3.1 We have identified the following interventions that could be pursued:

Table 4.2 Potential key sites interventions

Key Action	Reason for pursuing this intervention
Masterplanning/capacity studies on emerging sites, and those capable of expansion	For those Key sites that are little more than allocations we need to understand more about capacity and relationships between activities, which will then feed into other actions such as identity creation and the promotion of clustering
Densification/placemaking to improve offer on established sites	For those sites which appear to have been wholly or substantially developed – particularly those which could be viewed as ‘mature’ - there is the opportunity to explore ways in which investment to increase both the quantity of floorspace and the condition of the overall environment in which businesses operate could improve the quality of offer. Does this key site present a positive image, or does it discourage new investment? Are there locations within the site that could attract new companies, or do such spaces offer opportunities for enhancing the overall setting? Could such investment be considered in tandem with other interventions such as improving access?
Promotion of sectorisation and clustering where this is not strong	As we note elsewhere, clustering is a strong feature in parts of Hertfordshire, but it is also patchy. The M11 corridor potentially lacks some of the strong focus that we can see elsewhere, notwithstanding the strong science-based identity we see at the opposing poles of this corridor, in London and in Cambridge. There again there is the potential to explore new clustering opportunities in emerging activities such as climate change and AI which may broaden the range of business clusters to improve the county’s economic resilience as well as respond to shifting patterns of business activities
Creating a strong Identity/promoting marketability	Whilst there can be no suggestion that local planning authorities are simply allocating sites in Local Plans in the hope of attracting a range of unstipulated interests, there is the potential for much more to be done to appeal to specified end users, by creating a defined image and engaging in active marketing to capture potential users’ interest

Key Action	Reason for pursuing this intervention
Improved accessibility especially for non-car modes	Poor accessibility by the private motor vehicle is traditionally a significant deterrent to investment, hence the thinking behind the current LEP-led new bridge to improve access to Hoddesdon Business Park; this scheme also addresses improved cycling and walking. Proposals for a Mass Rapid Transport (MRT) solution being promoted within the A414 Corridor Strategy in Hertfordshire will, if successfully pursued, open up a number of Key Sites to either direct (on-line) or indirect (through spurs) public transport investment
Providing Bluegreen infrastructure	In addition to more general environmental enhancements, the potential to invest in greenspace and 'blue infrastructure' (ponds, lakes and wetlands) can promote the dual benefits of both an improved business environment and improved biodiversity, an important national objective.
Promoting knowledge exchange/networking e.g. through innovation centres	With a strong association with clustering, and offering potentially significant investment incentives would be the creation of knowledge transfer opportunities to enable businesses within an overall Key Site campus to work together. A specific objective could be the creation of an innovation centre.
Plugging into the zeitgeist e.g. – full fibre/AI/Green jobs/Clean Growth/digital and 5G capabilities	A specific area to explore would be the potential for Hertfordshire's key sites to support growth in emerging business sectors and practices. In terms of practices full fibre (FTTP) broadband has yet to be rolled out across the country to any great extent, including business locations – could there be specific initiatives on top of current programmes which might serve Hertfordshire well? Then there are new ventures in important emerging industries, such as AI and disruptive technologies, green jobs associated with the combatting of climate change. Could Hertfordshire's key sites tap into those opportunities?
'Pump priming' activities	This is a potential catch-all category where public and private bodies, acting individually or in partnership, secure the investment which will kickstart later investment, on the basis that unless such actions are taken, business investment may not take place. This could take the form of direct investment or some other form of collateral like an indemnification or a guarantee

4.3.2 More proactive innovations could include those set out in Table 4.3:

Table 4.3 Additional 'Pro-active' measures

Key Action	Reason for pursuing this intervention
Land Assembly/CPO	A longstanding potential open to public bodies, these are interventions which are a potential route to promoting employment growth (including resurrecting 'stalled' employment sites, particularly if they are linked with private or public funding initiatives around infrastructure provision)
Creation of Development Corporations to deliver key employment sites	In autumn 2019 the government announced a new Development Corporation (Toton, East Midlands, associated with the future delivery of HS2b (West Midland to Leeds element)) as well as a competition for the creation of additional ones. Current government thinking is that in addition to traditional larger scale corporations there is the scope for locally led, smaller scale bodies, which could play into the delivery of major employment locations in

	circumstances where there appear to be barriers to these being built out in a timely and comprehensive manner
Other partnerships to deliver new employment led development	Partnerships other than Development Corporations can be created to secure development objectives. Although these are generally housing led, partnerships to deliver, for instance, critical infrastructure are a proactive way of securing key business objectives, particularly where proposals cross administrative boundaries or involve the pooling and prioritising of capital investment
New funding models to utilise pooled/directed sources	There are two generic financial interventions which can work either independently or in tandem to secure the infrastructure necessary to unlock sites or create favourable investment opportunities. One of these is the establishment of strategic funding opportunities (such as Strategic Infrastructure Tariffs) by authorities, which could allow priorities to be directed towards delivering investment in Key Sites; an alternative could be the establishment of Local Authority Bonds which could be linked to pump priming investment on the expectation of a later payback
New funding models associated with capturing uplifts in land values	A separate funding strand works on the basis of capturing for the wider good a bigger share of the uplift in land values created by new development. There are various models including Tax increment Financing and the Development Rights Auction Model, and although these are currently in their infancy in the UK, there is much scope to expand their use

Examples of Potential Interventions

4.6.3 Examples of potential interventions, both in Hertfordshire and elsewhere, are set out below:

Intervention Example 1: Clustering of key employment activities to create synergy and assist knowledge transfer

Hertfordshire has 5 key sectors which are at the beating heart of the knowledge economy in the County. These are:

- **Life sciences** including a major focus on cell and gene therapy in and around Stevenage, Welwyn Garden City and Hatfield.
- **Advanced engineering and manufacturing** which has as its heritage the defence industry operations such as that of BAE (formerly in Hatfield) but has now substantially broadened out and frequently has a very strong IT and IA component.
- **Sustainable construction** (now often referred to smart construction) involving partial or total prefabrication/preassembly of housing, offices and other building structures and with a major local, innovative presence in the form of BRE in Watford.
- **Enviro-Tech activities** (also referred to as Agri-Tech) involving the development of new technologies in agriculture, horticulture, and aquaculture with the aim of improving yield, efficiency, and profitability, where there are substantial crossover benefits and synergy to be derived from the proximity of Rothamsted Research; and
- **Creative Industries**, particularly film and TV, with the presence of Leavesden Studios and Elstree Studios and the forthcoming Sky Studios also at Elstree.

Some of this clustering takes place naturally, but it can be encouraged through analysis of business needs, promotion of existing or redevelopment of sites to meet specific needs and marketing within the sector.

Clustering seems strong in the western and central parts of the county but could perhaps be strengthened in certain locations – the three North Herts Key Sites, the two in Broxbourne and in the Key Sites in Watford (Croxley/Watford Business Parks) and Hertsmeare (Elstree Way).

Intervention Example 2: Promotion of Innovation Centres - St John's Innovation Park Cambridge

St John's Park is located in Cambridge, part of St John's Innovation Park and also within the Cambridge Innovation cluster, the UK's premier knowledge based massing. Established by St John's College in 1987 within St John's Innovation Park, it has a gross area of 6,040 sq.m. and net lettable space 4,925 sq.m. Units for start-ups are available in a range of sizes from 13 to 26 sq.m. There are also 4 separate rooms conferences/seminars/training courses, a boardroom for 8 – 10 people and 4 separate meeting rooms for 4 – 5 people free to tenants.

The aim of the Centre is to:

- Provide a supportive environment for its clients, with access to shared facilities and services to tenants that they could not afford individually, enabling them to concentrate on business development.
- Over 100 units in the complex for business start-ups, varying in size so that operations from 2 to 25 people can be accommodated.
- Simple leases, typically terminable on one month's notice, providing a high degree flexibility.
- An overall focus on businesses involved in innovation in the field knowledge based industry, with the information technology, communications (including wireless), digital printing, cleantech, electronics and design sectors all well represented.
- The potential for new start-ups to begin their association with the Centre as virtual tenants (making use initially of meeting rooms and the training/advice the centre provides) and typically only taking up actual residence when the firm is a year old and well on the way to being fully functioning.
- The availability of support and practical assistance for tenants and virtual tenants, often utilising local, national and European programmes, with help in the in a wide range of areas including marketing, recruitment and general business planning, as well as relevant grant and tender opportunities; and
- Networking opportunities through social events for tenants, angel schemes and peer to peer contacts, with membership of the European Business Network allowing tenants to link with overseas operations.
-

Intervention Example 3: Tax Increment Financing

- Tax Increment Financing is a form of prudential borrowing which allows local authorities to borrow against future predicted increases in Business Rates that will result from infrastructure investment. Extensively used in the US, the Local Government Finance Act 2012 removed the most significant barrier to TIFs by enabling local authorities to retain business rates (to date the route to making such ventures work, although it could theoretically work with Stamp Duty Land Tax (SDLT) if that could be locally hypothecated).
- TIFs have been used as part of a range of City Deals and are particularly effective when coupled with Enterprise Zones (EZs) where there is a guarantee that 100% of business rates revenues are retained for 25 years, with rate rises in EZs automatically protected from any business rate resetting process the government introduces in the future.
- The most significant TIF to date has been the Northern Line Extension to Battersea Power Station in London where, in addition to the bulk of S106 and CIL revenue from the EZs in Nine Elms Enterprise Zone (where the Power Station is located) a substantial TIF deal has been brokered, for which repayments in part will be met by Business Rate revenue within the EZ (although the government also provided a repayment guarantee).
- Potentially TIFs provide a significant opportunity for forward funding strategic infrastructure investment to deliver growth, but there are two critical issues:
 - as with any initiative which involves borrowing for infrastructure investment to open up development opportunities which will ultimately pay for that infrastructure, there has to be a relatively high degree of certainty about future tax revenue.
 - although it should be possible in theory to manage this risk, the great unknown is whether the government will in future reset business rates to remove/time limit Business Rate retention, starving local authorities of funding to pay off borrowing (and Business Rates are in any event subject to government review and are increasingly seen as a discouragement to business investment and profitability).

Intervention Example 4: Local Government Bonds

There are a range of ways local authorities can raise funds through borrowing to fund infrastructure against the prospect of later financial returns to repay the finance borrowed. There are various alternatives, but Local Government Bonds may be the best of these.

- In 2015 Warrington Borough Council raised £150m for town centre regeneration through a bond issue and has since extended its scope. Following on from this the UK Municipal Bonds Agency (UKMBA) was established in July 2016.
- The aim of UKMBA (which is owned by 56 local authorities and is open to others) is to facilitate the issuing of bonds by smaller local authorities and obtain a competitive price for bonds (with the hope of rates lower than those for the Public Works Loan Board). Benchmark values for bonds are expected to be in the area of £250m – £300m.
- In February 2019 the Borough Council paid £60m via a private finance deal to purchase 2 solar farms and a battery array in Hull, 100 miles to the east, calculating that this will result in a £150m return over 30 years which can be ploughed into frontline services. Investment in business ventures could be a logical extension of this.

Intervention Example 5: Greater Norwich Infrastructure Investment Fund (IIF)

- In 2013 the Greater Norwich authorities (Broadland District Council, Norwich City Council, South Norfolk Council and Norfolk County Council), together with the New Anglia LEP signed a City Deal with government, establishing a Growth Board comprising these bodies.
- To help achieve the Board's growth ambitions, the City Deal agreed a strategic infrastructure programme with support through government approved access to preferential rate borrowing and the local authorities' commitment to pool a significant proportion of Community Infrastructure Levy (CIL) income collected in order to form an Infrastructure Investment Fund (IIF).
- Decisions on delivery and allocations of IIF funding to support the strategic infrastructure programme are made by the Greater Norwich Growth Board, and it does this on the following basis:
 - a Greater Norwich Infrastructure Plan which identifies priorities to the end of the current Joint Core Strategy (2026).
 - beneath this a Five Year Investment Plan (5YIP) is developed and agreed by partners; this confirms the strategic priorities in the Greater Norwich area for the IIF to support over the next five years.
 - the projects within the 5YIP programmed to receive IIF funding during the forthcoming financial year are accepted and included within an Annual Growth Programme (AGP).
 - the projects listed within the subsequent four years of the 5YIP become the IIF priorities and are considered for inclusion within future AGPs, with the process being repeated annually on a rolling basis.
 - both the 5YIP and the AGP are managed dynamically by the Board, as it has to take account of potentially changing priorities, and the identification of any further projects for delivery across the area which may arise (for instance, in response to other funding decisions and opportunities).
 - all parties are equal partners on the Board, which includes the County Council as the Accountable Body and the LEP as a fully-fledged partner.

Whilst these arrangements are not specifically for the purposes of promoting infrastructure to secure to promote business investment, there may be merit in making this a specific focus.

Intervention Example 6: Improving Access to Key Sites – The New River Bridge (Hoddesdon Business Park)

The recent commencement of construction work on the New River Bridge in Hoddesdon is a highly relevant example of an intervention in a Hertfordshire Key Site, given it will improve access to Hoddesdon and help promote new investment there

- Whilst much of the funding is being provided by Hertfordshire LEP, this is also a good example of a joint investment, with the County Council and Broxbourne Borough Council also providing financial support, with combined funding at nearly £11 m.
- The new high specification bridge replaces an ageing and inadequate structure which has acted as a long term disincentive to investment. As well as a better vehicular link the new bridge will offer high quality access to pedestrians and cyclists, and it can act as a future catalyst to investment including qualitative environmental improvements.

Intervention Example 7: Creation of a Strategic Infrastructure Fund

An example of this is the Cambridge and Peterborough Combined Authority proposed Strategic Infrastructure Fund. In September 2018 the Combined Authority produced a Housing Strategy to deliver an additional 100,000 new homes (including 40,000 affordable homes) in the Combined Authority area by 2037

- The Strategy takes the view that traditional measures of simply handing out public funds to support and deliver a finite number of homes is no longer sufficient, and the only method available to meet targets is the creation of a £170 m revolving fund to promote delivery and help the Combined Authority over the line and meet its targets
- A variety of development tools and options - in addition to traditional grants – are proposed, a key feature of which is Land Value Capture (LVC) and the creation of a £40 m Strategic Investment Fund (SIF) which would work as follows:
 - it would be used to unblock stalled schemes
 - these schemes would generate a return
 - that return would be reinvested, and the cycle would be repeated
- This is an initiative that has been developed in to have a housing focus, but it would equally have the potential to be led by employment site development

Intervention Example 8: 'Pump priming' by public bodies - Electricity Infrastructure Supply to West Loughborough

A pertinent example of this is in Leicestershire where there is a long established and significant issue relating to the capacity of existing electricity infrastructure to support proposed development west and south west of Loughborough (West Loughborough Sustainable Urban Extension) and Loughborough University Science and Enterprise Park (LUSEP).

Uncertainty around the delivery of these developments - particularly within LUSEP - requires upfront funding to secure the high quality electricity network connections that the developments require; however, the development promoters are known to be faced with cashflow issues in funding upfront costs, and there is also a requirement for sufficient lead in time (a minimum 3 years) for connections to be planned if these developments are not to be stalled.

The issue is that the network providers are unwilling to build in surplus capacity based on just the expectation – but not the certainty – that these developments will take place as planned, because if development is not ultimately forthcoming the provider will be left with what are known as 'stranded assets', infrastructure provided by them at considerable cost without any (or at best limited) certainty of future recompense.

Into this potential impasse has stepped the Leicester & Leicestershire LEP. In 2018 the LEP prepared a business case to part fund the upfront costs to support the installation of the critical first phase of electricity infrastructure, so there is now some expectation that delivery of these key strategic projects will not be affected (although requirements are not yet entirely future proofed, and the partners need to monitor progress towards ensuring a satisfactory outcome).

What can be taken from this is the advantage of 'pump priming' investment to overcome market uncertainty and/or unwillingness to invest without guaranteed outcomes. There are of course issues associated with transferring risk from private to public agencies – but also some potential significant benefits.

Intervention example 9: Initiatives within Herts Innovations Quarter (Key Sites at Maylands Business Park, BRE Watford and Rothamsted Research Centre)

Interventions associated with these three Key Sites have been established through the establishment of an Enterprise Zone (EZ) and, latterly, the creation of the Herts Innovation Quarter (HIQ).

The EZ was based initially on the promotion of the enviro-tech cluster and latterly has been widened out to cover sustainable construction. It covers 5 sites in and adjoining the Maylands Business Park and the two other Key Sites, and has enabled the following:

- the hypothecation of the entire uplift in Business Rates, with retention for 25 years to allow the priority use of the funds to stimulate growth within the local authority areas in which the zone is situated.
- Business Rate relief for firms identified as operating within the Enviro-Tech sector.
- a partnership – in the form of HIQ – with an agreed governance structure in the form of a Project Board and a signed Memorandum of Understanding.

The EZ has been the catalyst for the wider partnership established by HIQ. This brings together a range of local authorities and landowners with Herts LEP and an agreed set of priorities, which are to:

- harness the Quarter's relationship with London and elsewhere, making use of benefits from direct access to the M1, easy links to London, the wider South East and the Midlands, which collectively provide a gateway to the UK economy.
- maintain global excellence in science and technology: as HIQ sits at the heart of the Golden Research Triangle (Cambridge – London - Oxford) it is seen as being attractive to inward investment and having the capability of supporting businesses seeking expansion space from restrained sites within Greater London.
- utilise the expertise of a separate partnership organisation The Green Triangle (BRE, Rothamsted Research and the University of Hertfordshire) to establish Hertfordshire as a globally renowned centre of excellence in green technology.
- provide the foundations for growth, strengthening existing links with key sector employers and the Green Triangle Partners to act as catalysts for the formation of new enviro-tech firms and business start-ups.

In addition to these benefits HIQ is promoting a range of technical and practical measures including:

- a Marketing Strategy which launched the Enterprise Zone to market in March 2019, communicating the strength of the offer to target markets, differentiating the Enterprise Zone from its competitors, creating awareness with commercial agents and businesses in key sectors – specifically enviro-tech and modern construction - and in so doing, establishing a prospective pipeline of projects for landowners and partners.
- establishment of a dedicated marketing team of three people armed with specialist sector knowledge.

Intervention Example 10: Passenger transport initiatives associated with business development – Stevenage SmartGo

Launched in 2012, SmartGo Stevenage is a Sustainable Travel Plan for Stevenage employment areas. It involves a staff benefits package that aims to incentivise the use of sustainable transport - such as buses, bikes, trains and Electric Vehicles - offers rail discounts and increase expectations around improved staff health and wellbeing, a reduced carbon footprint and lowered parking demand.

Intervention Example 11: Masterplan and Site Capacity

The example described below illustrates how an early intervention to assess a site's potential can expedite the critical stages of a development project's evolution from site allocation to negotiations. The notes below are based on recent work by Markides Associates and CIVIX for the Hertfordshire Innovation Quarter, for the design of the 15.75ha Maylands Gateway site, Hemel Hempstead.

The study assessed the site's layout options for enviro-tech businesses and off-site manufacturing (OSM) companies seeking to locate operations in Herts. The site's development brief prepared by DBC provided guidance for the designers.

The site's capacity was tested to achieve a design that is more than an 'assembly of units'. The aim of the chosen layout is to create a *sense of place* as the setting for a cluster of light industrial (B2), SME workspace (B1b+c) and bespoke office and laboratory (B1a+b) uses.

The iterative master planning process created the focus for the parties (HIQ management, Dacorum BC planners, Herts CC Highways and prospective development partner) to investigate the site's development potential.

Discussions were based on the evidence of what is possible in spatial planning and urban design terms satisfying HIQ's aspirations and meeting DBC's site development ambitions.

The preferred scheme provided evidence to facilitate round table discussions, as well as a shared understanding of opportunities and constraints to satisfy agreed development objectives.

The proposals for the site observe the high environmental and urban design principles of HIQ, while responding to the spatial planning imperatives for the circulation of LGVs and DBC car parking standards.

The process expedited decision making, with meetings running over weeks rather than months. The parties agreed on what the site's well-designed development can accomplish and have thus been able to negotiate with confidence and progress efficiently.

4.4 Action plan – possible future interventions

- 4.4.1 We have reviewed Hertfordshire’s 17 key employment sites identified in this study, and an overall summary is set out below, with more details provided on each in Appendix B. These are preliminary recommendations for discussion with the relevant stakeholders.
- 4.4.2 The majority of sites are worthy of further exploration for tailored interventions, although there are a few where – either by reason of recent investment or because a range of interventions are already being pursued - we do not think any further action is justified at this stage. We have suggested some of these sites as ‘case studies’ for action, described in section 4.5 (with sites ranked in diminishing order of scale).

Table 4.4 Key employment sites, typology and possible interventions

Key Site	Capacity (see Table 2.2)	Typology	Possible Interventions
Maylands Business Park	2,165,411 sq.m.	Large, maturing, some opportunities	No specific interventions proposed, if current actions maintained
Gunnels Wood	1,840,064 sq.m.	Large, mature, some opportunities	Densification/placemaking
Welwyn Garden City	1,308,978 sq.m.	Large, mature, some opportunities	Masterplanning, densification/placemaking opportunities around full fibre/5G/green jobs, transportation innovation, new funding models, next generation of Development Corporations
Hoddesdon Business Park	1,152,230 sq.m.	Large, mature, some opportunities	Masterplanning, densification/placemaking identity/marketability passenger transport innovations, bluegreen infrastructure
Letchworth Garden City Main Employment Area	699,308 sq.m.	Large, mature, some opportunities	Masterplanning, densification/placemaking, sectorisation/clustering, transportation innovation, innovations, innovation centres/incubator hubs, next generation of Development Corporations, land assembly/CPO
Hatfield Business Park	671,721 sq.m.	Large, mature, some opportunities	No specific interventions recommended at this stage

Key Site	Capacity (see Table 2.2)	Typology	Possible Interventions
Leavesden	640,730 sq.m.	Large, maturing, limited opportunities	No specific interventions proposed at present
Park Plaza	512, 325 sq.m.	Large, fledgling, substantial opportunities	Masterplanning, sectorisation/clustering, identity/marketability, opportunities around full fibre/5G/green jobs, transportation innovation, innovation centres/incubator hubs
Watford/Croxley Business Park	483,551 sq.m.	Medium, mature, some opportunities	Densification/placemaking, sectorisation/clustering, innovation centres/incubator hubs opportunities, pump priming, land assembly/CPO
York Way Main Employment Area	390,950 sq.m.	Medium, size, maturing, substantial opportunities	Masterplanning (possible expansion)
Elstree Way Borehamwood	377,771 sq.m.	Medium size, mature, limited opportunities	Densification/placemaking Sectorisation/clustering, pump priming
Centennial Business Park	218,950 sq.m.	Small, mature, limited opportunities	Masterplanning (for potential expansion)
Marshmoor Business Park	167,572 sq.m.	Small, fledgling, substantial opportunities	Masterplanning, identity/marketability sectorisation/clustering, transportation innovation, innovative funding opportunities
BRE	159,551 sq.m.	Small, mature, limited opportunities	No specific interventions proposed, if current actions maintained
Potters Bar	143,765 sq.m.	Small, mature, some opportunities	Sectorisation/clustering, transportation innovation, identity/marketability, masterplanning (for potential expansion)
Rothamsted Research Centre	76,003 sq.m.	Small, mature, limited opportunities	No specific interventions proposed, if current actions maintained
Gilston	50,000 sq. m.	Small, fledgling, some opportunities – with adjacent EZ, more opportunities	Masterplanning, sectorisation/clustering, specialisation, partnerships,

4.5 Action Plan Next Steps

4.5.1 We propose the following actions – some short and some longer term – to take forward the ideas we have developed and the conclusions we have reached. We have identified actions and *possible* applicability in terms of where those actions should be focused, but ultimately we would suggest joint working between Herts LEP and other partners to define the precise scope, cost and timing of future work on interventions, as well as a conformation of overall priorities for action and where specific interventions could be tested.

Table 4.5 Action plan: short term interventions (6 – 12 months)

Proposed intervention to be explored	Potential Key Site	Reason for choice
A comprehensive interventionist study for a fledgling site – masterplanning, potential cluster activity, funding of infrastructure, identity marketability etc	Park Plaza West	An emerging site which offers significant opportunities (more so than any Key Site) but which requires concerted and early action by a range of interests to deliver its full potential
Similar actions on a smaller scale Key Site	Marshmoor Business Park	The potential to be an exemplar to other smaller Key Sites, with the potential around a proactive landowner and the proximity to the MRT should it be delivered
A further comprehensive and interventionist study in relation to a more traditional, large and mature Key Site, with a potential focus on smaller scale interventions (densification/placemaking) but wider potential too	Welwyn Garden City Industrial Area	Meets all these requirements, is well located and has been under pressure with losses to other uses
Densification/placemaking/sector specialisation studies into a medium scale, mature Key Sites	Elstree Way Borehamwood	Some losses/pressures but also potential when considered in relation to potential the new Sky Film Studios
Interventions based on a new access into a Key Site	Hoddesdon Business Park	Considerable merit in exploring the potential benefits that can be derived from the new bridge being constructed
Employment Studies in relation to the proposed Gilston development	Gilston	An early exploration of the potential form and function of the employment opportunities presented by this proposed new development and partnering opportunities

Table 4.6 Action Plan: Longer term interventions (12 – 24 months)

Proposed intervention to be explored	Potential Key Site	Reason for choice
Clustering Studies	Generic	There is merit in an exploration extending business clustering around Hertfordshire’s key knowledge based business activities, including new and emerging opportunities
Development of one or more new Innovation Centres in Hertfordshire	Generic	There are potential benefits in exploring of the added value that such facilities could bring to Hertfordshire’s key sites, and the wider economy
Exploration of the potential benefits of extending Hatfield Business Park	Hatfield Business Park	The Business Park is one where there is clear potential to expand the exiting Key Site, and studies could draw out the local and wider benefits of pursuing this course of action
Employment Studies in relation to the proposed Gilston development	Gilston	An early exploration of the potential form and function of the employment opportunities presented by this proposed new development and partnering opportunities

4.6 Specific Actions linked to current and emerging strategies

- 4.6.1 We do not at this stage wish to proscribe specific actions for individual organisations, as we believe this is an important next step for the parties themselves. Notwithstanding this we are aware of a range of established and emerging strategies that could explore some of the elements of the Action Plan we define above. These include the following:

Table 4.7 Established/emerging strategies and relationship with Action Plan

Strategy	Commentary	Intervention it relates to
Proposed Creative & Screen Industries Strategy	As part of the Herts Growth Board Development Programme Hertfordshire LEP is looking to build on the well-established creative industries sector (focused on the SW of the county), to enable it to become the UK's leading centre for the sector; to grow from good to excellent and to ensure its long term sustainability	Promotion of sectorisation and clustering, with a focus on all Key Sites in SW Herts, with particular attention to be directed towards Elstree Way Borehamwood Key Site
Proposed SE Herts Carbon Reduction and Air Quality Strategy and associated projects	Also part of the Herts Growth Programme, this strategy would involve a suite of major projects to tackle simultaneously poor air quality challenges in and around the Borough of Broxbourne through the creation of high quality/high value employment opportunities based on clean air technology businesses and innovative carbon reduction solutions such as wireless EV charging	A central focus for this strategy would be the Park Plaza employment development sites including Park Plaza West, potential interventions are expected to focus on the promotion of sectorisation, major access proposals to the Key Site and its role in the London – Stansted – Cambridge Innovation Corridor
Revised Hertfordshire Green Infrastructure Study	The forthcoming update of the existing strategy will provide an opportunity to trial initiatives in this particular area	Bluegreen infrastructure
The A414 Corridor Strategy	Adopted by Hertfordshire County Council in November 2029, the strategy identifies a package of 30 proposals designed to improve east – west links in the county, in the acknowledgement that these are currently less well developed than the north – south links	There is considerable to promote improved access to Hertfordshire's Key Employment Sites either on the route of or close to these proposed investment packages
Local Economic Intelligence feeding into case studies	An acknowledgement that local authority Economic Development Officers have a wealth of information relating to Key Employment Sites and other employment sites which will support action plan objectives	All potential interventions

5. Conclusion

5.1 General

- 5.1.1 This study has reviewed available information on loss of employment space in Hertfordshire and future projections of floorspace changes, as well as local employment land studies. It has proposed a set of characteristics of 'key' employment sites, which can provide a focus for strategic interventions. The study identifies 17 key sites, but at the same time it recognises that only some 20% of employment is located in these, and there are many other employment locations, particularly town centres, that contribute strongly to Hertfordshire's economy.
- 5.1.2 A variety of data sources have been reviewed to analyse employment at various geographic levels, and indications are provided of future employment changes; however it is noted that many data sources may be unreliable at the local level and Local Employment studies are likely to provide the best indication of future employment land needs.
- 5.1.3 A 'typology' of sites is suggested to help identify potential interventions, which should be bespoke to each site, and each site has been reviewed to suggest potential future interventions. Further work is need in a multiagency approach to consider these sites and interventions.
- 5.1.4 The recommendation is for the report to be consulted on with the local authorities and other stakeholders, with a view to confirming the broad strategy and agreeing a more detailed action plan for future interventions.

APPENDIX A - FUTURE 'WORLD OF WORK' SCENARIOS

Scenario 1: Big changes in the world of work

What do we mean by this?

Transformative technological changes coupled with societal shifts as new generations of workers demand changes in the working environment causes radical shifts in the business environment; hard employment floorspace needs are likely to be reduced, but equally, the environment in which people work changes significantly towards a better ‘offer’.

Key Features Scenario 1: Big Changes in the World of work	
Transformation	Effects
End of ‘9 to 5’	Work patterns become more fluid – people start/finish different times of day, or station themselves at different locations during the course of the day
Workplaces run by Millennials	As they move up the command structure - taking over from Baby Boomers/Generation X - Millennials impose their own work values and practices on the workplace. Expect them want to do things differently from their predecessors
A1/Digital economy of key driver	AI, already establishing itself, will be turbo boosted by the rollout of 5G, allowing so many activities to be undertaken differently. Key changes will include Massive Machine Telecommunications (increased communications between machines and sensors without human intervention); and Ultra Reliable, Low Latency Communications, with the speed and accuracy of communications being at the core of a wide range of technologies such as driverless cars and remote/distance healthcare for patients. Put simply, this will change employment practices even in areas such as R & D and manufacturing, where a physical presence to undertake individual tasks becomes much less critical
Targeted actions are the key	With this scenario ‘entire day’ interactions with co-workers (and between management and workers) are replaced with ‘targeted interactions’ when the workforce comes together for specified events/activities to share experiences/ideas and to maintain workforce cohesiveness. The idea of workers sitting side by side at workstations for the entire working day becomes a thing of the past
A higher quality work ‘offer’ is required	With these changes, workspace requirements change substantially to cater for workers who will not restrict themselves to ‘whole day’ workplace activities, arriving and leaving the site at set times. With the blurring of work and play, workers wish to interact with their co-workers and others not just in workplaces but in and around the business campus. Social, leisure and cultural experiences become more important, as does blue-green infrastructure as the business setting becomes more important. What is also important is congregational space outside the workplace – cafes, restaurants and gyms. On campus educational and health facilities are also likely to feature

Key Features Scenario 1: Big Changes in the World of work	
Mobility more critical than access	With home to workstation likely to become less linear – a decline on ‘out and back’ journeys at set times – the transportation network is relieved of some of the stresses of the daily commute, but instead has to cater for a greater number of inter and intra employment site movements

What this means for employment space:

5.1.5 It is worth stressing that not all employment activities will be radically affected with this scenario – a large number of service-related jobs such as retail and hospitality may be relatively unaffected as a physical presence to allow an interaction may well prevail. However, where there are choices around whether a worker needs to be physically present on a regular basis, then there may be the need for significant less space over time – although less so than with Scenario 3.

Scenario 2: The ship steadied

What do we mean by this?

In time the loss of employment space is slowed and possibly reversed. There are national factors – losses, it turns out were part of a market adjustment and a recognition that there was simply too much employment space – much of it in the wrong location or of insufficient quality. With a smaller but leaner stock of sites and premises employment space planning can be conducted in a less fraught environment. Locally, Hertfordshire receives a boost as it fulfils its potential at the heart of the Golden Triangle, rather than acting as a facilitator of London’s growth.

Key Features Scenario 2: ‘The Ship Steadied’	
Transformation	Effects
‘9 to 5’ remains the norm	Existing work patterns are sustained – there is an increasing reaction against the blurring of work and free time, and if productivity is improved, we may see the pressure being taken off longer working hours
Workplace culture is sustained even with ‘the changing of the guard’	Despite the changing command structures the Baby Boomer/Generation X legacy is able to persuade Millennials to maintain work values and practices
A1/Digital economy the servant rather than the master of the workplace	AI is still recognised as offering transformative changes in the way society functions – and by extension, the workplace - but there is a cultural pushback against its potential to play a dominant role; instead it is much more about it supporting the business environment, playing a significant role in improving productivity as it does so
Employment space retains its traditional feel	As workers continue to spend the day at the workplace and travel away for non-work related activities there is limited need to improve the overall ‘offer’, although workers increasing demand

	a quality working environment, so investment in achieving this remains important.
Access to workspaces becomes increasingly critical	What workers crave is better access in the enduring peak hour travel, and here, new transport technology plays an increasingly significant role – ride sharing and hailing, clean transport modes and eventually autonomous vehicles

What this means for employment space:

Change is slower, most inefficient or poor office and other workspace has been lost to other uses, and there is good demand for all kinds of employment floorspace. There is an increasing focus on public transport accessibility, particularly for office-related jobs and on the quality and flexibility of space.

Scenario 3: Managing a graceful decline

What do we mean by this?

In essence this is a more extreme version of Scenario 1, with employment space caught fully in the pincers of cultural shifts in attitude to work and the impact of AI on business capability.

Key Features Scenario 3:	
Transformation	Effects
The employment ethos of separate locations for each individual enterprise breaks down	Working activities are largely conducted in ‘offsite’ or ‘virtual’ locations – where physical interactions can take place anywhere, driven perhaps by the capability of 5G and of course other innovations we have covered
Workplace culture changes	Largely in the same way as the manufacturing culture has developed into the service related culture, workers increasingly no longer see themselves as ‘going to work’ but fulfilling their work functions in a way that that is most comfortable to them and most cost effective to business owners
Employment space starts to look quite different	Most businesses maintain the smallest possible physical presence as they need to and where possible, share spaces with others

What this means for employment space:

A post-apocalyptic vision for some, but potentially a future reality if the bonds between workers and workspaces are significantly broken. It is not easy to see how scenarios will play out but any move towards this one would be significant indeed and would call on all parties to come together and consider how the consequences should be responded to.

APPENDIX B- KEY SITES - POTENTIAL INTERVENTIONS

Location No and Details	1	Elstree Way Borehamwood (Hertsmer Borough Council)
Key Site Typology	We judge this to be a medium size, mature, heavily constrained key site	
Size	42 ha	
Capacity (if known)	Not specified; some	
Use (actual/proposed)	Mix of B1/B2/B8 uses	
Development Timeframe (if known)	None specified	
Land ownership	Not known	
Why select as a potential case study for possible intervention	One of only a limited number of medium scale employment sites, where capacity has been reduced over the years due to a loss of employment activities on its former western side. Whilst subject to an Article 4 Direction it is potentially vulnerable, whilst at the same time, the proposed new Sky Studios, coupled with the existing studio activities in Borehamwood, may be reason alone to explore the potential opportunities to enhance the key site and promote sector specialisation in the creative industries.	
Potential Interventions to potentially focus on:	Densification/placemaking Sector specialisation	

Location No and Details	2	Hatfield Business Park (Welwyn Hatfield Borough Council)
Key Site Typology	We judge this to be a large, maturing key site with some constraints, but with the potential for expansion.	
Size	68 ha	
Capacity (if known)	Council reports that there is still some 18,000 sq.m. of vacant land that can still come forward	
Use (actual/proposed)	Modern Business Park in campus setting, mix of B1/B2/B8 uses and the University of Hertfordshire as a major presence.	
Development Timeframe (if known)	Current opportunity by 2020/21 identified in the SLP; possible extension to be determined.	
Land ownership	Arlington Business Parks	
Why select as a potential case study for possible intervention	Whilst the existing Business Park is well established with new opportunities in the pipeline there is a significant opportunity around a possible long term extension that could be explored; this could consider new opportunities associated with innovations such as 5G and AI and, potentially, address the Green Jobs agenda, as well as new transportation innovations potentially associated with the proposed MRT.	
Potential Interventions to potentially focus on:	Masterplanning/capacity studies Opportunities around full fibre/5G/green jobs Transportation Innovation Innovation Centres/incubator hubs	

Location No and Details	3	Hoddesdon Business Park (Broxbourne Borough Council)
Key Site Typology	Medium scale, mature, heavily constrained	
Size	110 ha on 6 separate campuses	
Capacity (if known)	Not known	
Use (actual/proposed)	Predominantly B2/B8, includes a waste transfer station, other waste uses and a power station	
Development Timeframe (if known)	Hoddesdon Business Park Business Plan (2013) seeks early intervention	
Land ownership	Not known	
Why select as a potential case study for possible intervention	This is a well-established employment site that is currently undergoing the benefit of improved access arrangements that could lead to an investment boost; it already has the benefit of the proximity of the Rye House railway station 100m away, and an established enterprise centre, Ambition	

Location No and Details	3	Hoddesdon Business Park (Broxbourne Borough Council_
		Broxbourne Business Centre. There is a Business Park Improvement Plan dating from 2013 on which progress has been made which may benefit from revisiting given the changing circumstances. Qualitative investment (including in a gateway site) could bring significant economic benefits
Potential Interventions to potentially focus on:		Masterplanning/capacity studies Densification/placemaking Identity/marketability Passenger transport innovations

Location No and Details	4	Letchworth Garden City Main Employment Area (North Herts District Council)
Key Site Typology		We judge this to be a large, mature, heavily constrained site with a small amount of employment area expansion available
Size		Submitted Local Plan (SLP) suggests a total of 74.3 ha
Capacity (if known)		Not known
Use (actual/proposed)		Long established employment area comprising mix of B1/B2/B8 uses.
Development Timeframe (if known)		Not known
Land ownership		Not known
Why select as a potential case study for possible intervention		This is a traditional and long established employment area, created as part of the Garden City, close to the town centre and railway station, with access constraints which may inhibit intensification of use. It is this category of major employment location that may lend itself to future investment in one or more of Hertfordshire's key sectors as part of a general expansion of activities, if innovative transportation solutions can be derived (possibly in association within and East – West (north) corridor solutions]). With its location in the north of the county it acts as a counterbalance to the WGC main employment area south. With the potential involvement of the Letchworth Garden City Heritage Foundation (already working with Herts LEP on businesses opportunities) there may be potential to explore governance, funding and delivery issues. The small additional area of new employment space (the former Power Station – 1.5 ha) might offer innovation/incubation opportunities.
Potential Interventions to potentially focus on:		Masterplanning/capacity studies Densification Promotion of sectorisation Elimination of access constraints Passenger transport innovations Innovation Centres/Incubation hubs Next generation of Development Corporations Land Assembly/CPO

Location No and Details	5	Marshmoor Business Park, Welham Green (Welwyn Hatfield Borough Council)
Key Site Typology	We judge this to be a small, fledgling, and heavily constrained key site, given its proximity to residential uses	
Size	Submitted Local Plan (SLP) suggests 4.1 ha	
Capacity (if known)	SLP proposes 40,500 sq.m. of B1	
Use (actual/proposed)	SLP promotes it as a potential location for bioscience research, considering it highly accessible from elsewhere in the London-Cambridge corridor.	
Development Timeframe (if known)	SLP suggests (next 10 years)	
Land ownership	Uncertain? (Royal Veterinary College interest, but is it part of the Salisbury estate?)	
Why select as a potential case study for possible intervention	This is a small site constrained site within Welwyn Hatfield, dwarfed by the opportunities at Hatfield Business Park and within Welwyn Garden City. Notwithstanding this there is a potential niche opportunity to act as an exemplar for small iconic sites which could punch above their weight in appealing to Hertfordshire's economic strengths, and which might lend itself to sector clustering (bioscience); it appears to have the benefit of a proactive and engaged site promoter/possible end user; possible proximity to the line of the MRT and therefore has the potential for transport innovation	
Potential Interventions to potentially focus on:	Masterplanning Identity/marketability Sectorisation/Clustering Opportunities Transport Innovation	

Location No and Details	6	Park Plaza West (Broxbourne Borough Council)
Key Site Typology	We judge this to be a large, fledgling relatively unconstrained site	
Size	Not identified	
Capacity (if known)	Submitted Local Plan (SLP) defines 100,000 sq.m. of gross floorspace restricted to use classes B1(a) and B1(b) in a business campus. The SLP identifies potential around the life sciences, digital and media sectors for business seeking investment in the London – Stansted – Cambridge corridor	
Use (actual/proposed)	Not developed currently	
Development Timeframe (if known)	Within the timeframe of SLP (by 2033)	
Land ownership	Not known	
Why select as a potential case study for possible intervention	This key site represents a major opportunity for investment in high quality business activities which could support growth in the Hertfordshire economy. but needs a focus to develop and understand the full nature of the opportunity being presented and to develop its identity. Some consideration has been given to access arrangements but more needs to be achieved to recognise how the site could be laid out through further work to take forward the current conceptual plan. There are also potential passenger transport opportunities to explore, including the potential of a new Park Plaza Station (which would also serve the other Park Plaza sites, South and North) and the opportunity that could be offered by a potential extension to Crossrail 2	
Potential Interventions to potentially focus on:	Masterplanning/capacity studies Promotion of sectorisation Identity/marketability Opportunities around full fibre/5G/green jobs Transportation Innovation Innovation Centres/incubator hubs	

Location No and Details	7	Welwyn Garden City Industrial Area (Welwyn Hatfield Borough Council)
Key Site Typology	We judge this to be a large, matured heavily constrained key site	
Size	149 ha	
Capacity (if known)	No specified; some losses to residential use	
Use (actual/proposed)	Mix of B1/B2/B8 uses	
Development Timeframe (if known)	None specified	
Land ownership	Not known	
Why select as a potential case study for possible intervention	Another large and well established, traditional new town employment area, currently the largest employer within the key sites. Well located adjacent to the town centre and mainline railway. Some traditional large scale premises have been lost to residential development and although opportunities remain, our studies suggest that it is one of the few key sites predicted to see a loss of jobs by 2036. Further work is needed to see which interventions might boost employment opportunities and reverse the predicted decline	
Potential Interventions to potentially focus on:	Masterplanning/capacity studies Densification/placemaking Opportunities around full fibre/5G/green jobs Transportation Innovation New funding models Next generation of Development Corporations	

Location No and Details	8	Watford/Croxley Business Park (Watford Borough Council)
Key Site Typology	Medium, mature, some opportunities	
Size	483,551 sq.m.	
Capacity (if known)	No specified; some losses to residential use	
Use (actual/proposed)	Mix of B1/B2/B8 uses	
Development Timeframe (if known)	None specified	
Land ownership	Not known	
Potential Interventions to potentially focus on:	Densification/placemaking, sectorisation/clustering, innovation centres/incubator hubs opportunities, pump priming, land assembly/CPO	

Location No and Details	9	Potters Bar (Hertsmere District Council)
Key Site Typology	Small, mature, some opportunities	
Size	143,765 sq.m.	
Capacity (if known)		
Use (actual/proposed)		
Development Timeframe (if known)		
Land ownership		
Potential Interventions to potentially focus on:	Sectorisation/clustering, Transportation innovation, Identity/marketability, Masterplanning (for potential expansion)	

Location No and Details	10	York Way Main Employment Area Royston (North Hertfordshire)
Key Site Typology	Medium, size, maturing, substantial opportunities	
Size	390, 950 sq.m.	
Capacity (if known)		
Use (actual/proposed)	Mix of employment currently; Local Plan allocates additional 10.9 ha north of York Way	
Development Timeframe (if known)		
Land ownership	Unknown	
Potential Interventions to potentially focus on:	Masterplanning (possible expansion)	

Location No and Details	11	Gunnels Wood (Stevenage Borough Council)
Key Site Typology	Large, mature, some opportunities	
Size	1,840,060 sq.m.	
Capacity (if known)		
Use (actual/proposed)	<p>One of the largest employment sites in Hertfordshire, approx. 300 businesses and 18,800 employees, made up of number of different business parks and single occupiers. Mix of B-class employment activities</p> <p>Strong aerospace and other engineering, life sciences (Bio Science Catalyst)and IT industry representation. LEP recently undertook inventory of businesses on site –some low-utilised or vacant sites.</p> <p>Large retail park in area closest to station.</p> <p>Aspirations to remodel Gunnels Wood to meet modern requirements and provide a high quality and attractive business destination. Much better links to railway station and town centre.</p>	
Development Timeframe (if known)	TBC	
Land ownership	Various	
Potential Interventions to potentially focus on:	<p>Densification/placemaking</p> <p>Possible links to Letchworth Garden City opportunities for additional floorspace if Gunnels Wood constrained?</p>	

Location No and Details	12	BRE (St.Albans)
Key Site Typology	Small, mature, limited opportunities	
Size	159,551 sq.m.	
Capacity (if known)		
Use (actual/proposed)	Office and research-based uses. part of Herts IQ (and EZ). Includes start-up and innovation space on their campus in Watford, further capacity planned in 2020.	
Development Timeframe (if known)	N/A	
Land ownership	Unknown	
Potential Interventions to potentially focus on:	No specific interventions proposed, if current actions maintained	

Location No and Details	13	Maylands Business Park (Dacorum/St.Albans)
Key Site Typology	Large, maturing, some opportunities	
Size	2,165, 411 sq.m.	

Capacity (if known)	8,000 more jobs across Herts IQ
Use (actual/proposed)	One of the largest employment areas in the region, approx. 600 businesses and 20,000 jobs. Mix of employment uses, ranging from large warehouse/distribution units, industrial units and larger floorplate office space. Enterprise Zone and HIQ, active interventions by LEP and other stakeholders. Mix of uses; major expansion to east planned by Crown Estate including commercial and housing, including improvements to Junction 8 of M1.
Development Timeframe (if known)	Various
Land ownership	Various – Crown Estate, Dacorum Council, Pro-Logis
Potential Interventions to potentially focus on:	No specific interventions proposed, if current actions maintained

Location No and Details	14 Rothamsted Research Centre (St. Albans)
Key Site Typology	Small, mature, limited opportunities
Size	76,003 sq.m.
Capacity (if known)	
Use (actual/proposed)	Agri-tech research, part of Herts IQ (and EZ). Includes Agri-Tech Research Innovation Accelerator (AgRIA), recent investment by Local Growth Fund investment from Hertfordshire Local Enterprise Partnership (LEP).
Development Timeframe (if known)	N/A
Land ownership	Unknown
Potential Interventions to potentially focus on:	No specific interventions proposed at present if current actions maintained

Location No and Details	15 Leavesden (Three Rivers District Council)
Key Site Typology	Large, maturing, limited opportunities
Size	640,730 sq.m.
Capacity (if known)	
Use (actual/proposed)	Leavesden Studios, owned by Warner Brothers (Harry Potter World) , together with Leavesden Park development (offices). Various expansions of Harry Potter World have taken place.
Development Timeframe (if known)	
Land ownership	Warner Brothers/MEPC?
Potential Interventions to potentially focus on:	No specific interventions proposed at present

Location No and Details	16 Gilston (East Herts)
Key Site Typology	Small, fledgling, substantial opportunities
Size	5 ha.
Capacity (if known)	As above
Use (actual/proposed)	Adjacent to and part of New Harlow and Gilston Garden Town proposals in this location; within East Herts, 5 ha business park proposed in Local Plan; but adjacent to Harlow EZ, with substantial other employment opportunities on 3 large sites

Development Timeframe (if known)	
Land ownership	Various
Potential Interventions to potentially focus on:	Masterplanning, Sectorisation/clustering, Specialisation, Partnerships,

Location No and Details	17 Centennial Business Park (Hertsmere)
Key Site Typology	Small, mature, limited opportunities
Size	218, 950 sq.m.
Capacity (if known)	7 ha for potential expansion, see below
Use (actual/proposed)	Council have proposals for 'Elstree Creative Corridor' covering the east/west corridor stretching from the M1 through Borehamwood and Elstree to the A1 encompassing the Elstree Way Employment Area, Centennial Park Industrial Area, Borehamwood town centre. Site of 7 ha to north identified as potential expansion for employment in 2018 Hertsmere review of potential sites for Housing and Employment , although promoters of site (Taylor Wimpey) advocate residential .
Development Timeframe (if known)	Unknown
Land ownership	TBC
Potential Interventions to potentially focus on:	Masterplanning (for potential expansion)