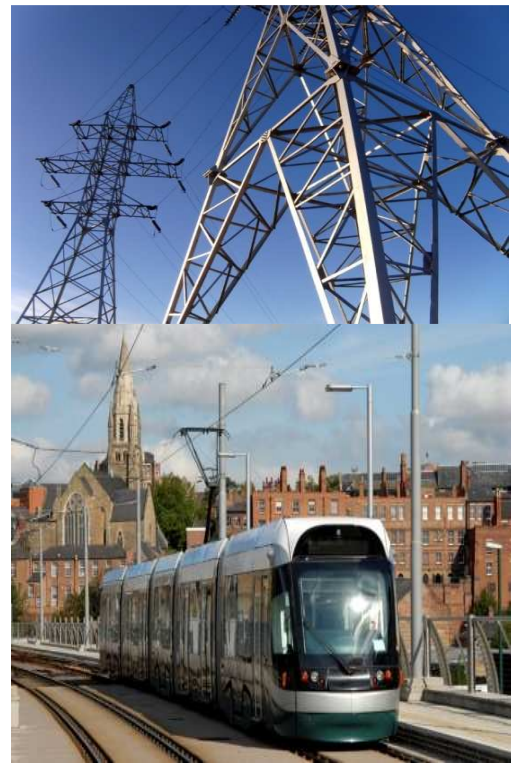


## Dacorum Borough Council

# Employment Land Update 2011



Final Report July 2011

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# CONTENTS

<b>1</b>	<b>INTRODUCTION</b> .....	<b>1</b>
<b>2</b>	<b>EARLIER EVIDENCE</b> .....	<b>3</b>
	The London Arc Study.....	3
	The 2010 Update.....	4
<b>3</b>	<b>THE POLICY CONTEXT: RECENT CHANGES</b> .....	<b>9</b>
	Housing.....	9
	Employment .....	10
<b>4</b>	<b>A NEW EMPLOYMENT FORECAST</b> .....	<b>13</b>
	Why has the Forecast Changed? .....	13
	Labour Market Alignment.....	14
<b>5</b>	<b>THE DEMAND AND SUPPLY OF EMPLOYMENT LAND TO 2031</b> .....	<b>17</b>
	Demand.....	17
	Planned Supply .....	18
	Market Balance and Policy Implications.....	19
<b>6</b>	<b>CONCLUSIONS AND RECOMMENDATIONS</b> .....	<b>23</b>
	Quantitative Targets .....	23
	Other Advice.....	24

## APPENDIX

### SUPPLY SCHEDULES



# 1 INTRODUCTION

- 1.1 This study has been commissioned by Dacorum Borough Council as part of the evidence base that informs its emerging Core Strategy. Its purpose is to recommend updated quantitative targets for the provision of employment land in the plan period to 2031 and to advise on the implications of these targets.
- 1.2 This study is an update of two earlier evidence base studies, also produced by Roger Tym & Partners and published in 2009 and 2010 respectively. In the short time since these studies were completed, the policy environment has changed radically, further to the new Government's decision to abolish Regional Spatial Strategies (RSSs). Going forward, land provision targets both for employment and for housing, which were previously set by the RSS, will be determined by local planning authorities individually. In Dacorum, there are two consequent changes that may affect employment land. Firstly, the Council is setting new housing targets, which may impact on the demand and need for employment land. Secondly, while under the RSS Dacorum's employment land provision was part of wider regional and sub-regional strategies, under the new system the Council will plan independently. This report assesses the impact of these changes.
- 1.3 Below, Chapter 2 summarises the earlier studies that are our starting point. Chapter 3 looks at current and emerging planning policy, to see what has changed since our earlier studies were written. Chapter 4 introduces new employment forecasts, taking account of the latest proposed housing targets and macroeconomic prospects. Chapter 5 translates these forecasts into demand for employment land and compares this with the current planned supply, to assess the balance of demand and supply over the plan period to 2031. Conclusions and recommendations are in Chapter 6.
- 1.4 Like the earlier reports which it brings up to date, this study is about the traditional employment or 'B-class' uses, which comprise industry, warehousing and offices and correspond to Classes B1-B8 of the Use Classes Order, together with physically similar *sui generis* uses. The study does not consider land provision for the many other land uses ('the non-B economic uses') that also provide employment, such as retail, leisure, education and health.



## 2 EARLIER EVIDENCE

2.1 The current employment evidence base for Dacorum comprises two studies, both produced by Roger Tym & Partners, which we have already mentioned:

- The *Hertfordshire London Arc Jobs Growth and Employment Land Study* ('London Arc Study', March 2009) a strategic sub-regional study which advised on employment land provision across seven districts, covering most of Hertfordshire;
- The *South West Hertfordshire Employment Land Update* ('2010 Update', June 2010), a local study that advised on the local delivery of this broad strategy in Dacorum and Three Rivers.

### The London Arc Study

2.2 The London Arc Study (2009) put forward provision targets for employment land across the seven districts, based on employment forecasts produced in by Oxford Economics (OE)'s East of England model in Spring 2008. As part of the study, we provided a critical review of several forecast scenarios and worked with the client group to select a preferred scenario. For the plan period 2006-31, the preferred showed total workplace employment<sup>1</sup> in the study area increasing by 61,000 jobs, of which 18,000 were in Dacorum<sup>2</sup>.

2.3 The London Arc Study used employment densities to translate the employment forecasts into floorspace numbers. Following an accepted method, the study interpreted these numbers as an indicator of the future demand for land. For Dacorum in 2006-31, the resulting demand forecast for the B-class uses (*'the Spring 2008 scenario'*) was net additional floorspace of:

- 29,000 sq m for industry and warehousing
- 223,000 sq m for offices<sup>3</sup>.

2.4 The London Arc report considered that these district-level forecasts would not make good policy targets, because they did not take account of either the physical capacity of different districts or spatial policy objectives. The report noted that forecasts for small areas were not robust, partly due to unreliable data, but also, more important, because much of the demand for space was footloose across local authority boundaries. So planning could steer development to the best places within the study area, irrespective of local authority boundaries, while still meeting demand. Accordingly, the study suggested a set of first-draft land provision targets for individual districts (*'the London Arc targets'*) that redistributed the forecast demand within the study area, in favour of place which had greater land supply and were identified as growth centres in local policy. It advised that the seven authorities should consider the London Arc targets as provisional figures, which they might choose to amend in the light of local knowledge and policy priorities.

<sup>1</sup> Workplace employment is the number of jobs located in an area.

<sup>2</sup> Numbers quoted in the text are rounded,

<sup>3</sup> Where we quote floorspace figures relating to 2031 from the London Arc report, they are usually taken from the report's appendices, because the main text of the report focused on the period to 2026.

- 
- 2.5 For Dacorum, the London Arc targets show net additional floorspace for 2006-31 of:
- 28,000 sq m for industry and warehousing
  - 125,000 sq m for offices.
- 2.6 For industry and warehousing, the suggested London Arc target was virtually the same as the Spring 2008 demand scenario. But for offices, the Dacorum target showed a far lower requirement than the Spring 2008 demand scenario. This is because the committed and proposed supply at the time included large amounts of land for office development elsewhere in the study area, including at Leavesden Park in Three Rivers and two new business park sites in the districts of St Albans and Welwyn Hatfield respectively. In contrast, Dacorum's identified land supply was below its forecast demand. Therefore, in setting the target, we redistributed some of the study area's forecast demand away from Dacorum and in favour of Three Rivers, St Albans and Welwyn Hatfield. As well as Dacorum's floorspace requirements, this of course reduced Dacorum's future employment growth.
- 2.7 If we were to update the London Arc Study now, much of this assumed supply would disappear, because land at Leavesden Park is now proposed for other uses and St Albans is no longer planning for a new business park. Other things being equal, this would result in a higher office provision target, and hence more future employment growth for Dacorum. However, this would not be a good time to update the London Arc Study, as the planning system is in flux and there are no arrangements for strategic planning across local authority boundaries. In our conclusions (paragraph 6.9(ii) below) we discuss how the Council should deal with this issue.

### The 2010 Update

- 2.8 As mentioned earlier, the 2010 Update was meant to provide a translation of the London Arc Study to the local level, showing how the employment land strategy for the wider sub-region could be delivered in Dacorum. Therefore, as one would expect, the two London Arc employment/demand scenarios (Spring 2008 and London Arc targets) were carried forward into the 2010 Update. But in the Update, we also considered a third demand scenario, based on a more recent Oxford Economics forecast, *Autumn 2009*. This showed Dacorum's employment growth in 2006-31 as 15,000 jobs, 3,000 less than OE's Spring 2008 scenario.
- 2.9 Of these three employment/demand scenarios, only one, Spring 2008, was taken forward into policy, through the consultation draft Core Strategy. Nevertheless, it will be useful briefly to compare the three, because the differences between them provide some interesting lessons for the future.
- 2.10 While we do not know the detail behind the Autumn 2009 scenario, we presume that this reduction is due to the worsening economic outlook between the two dates. But there is another important difference between the two scenarios: they are based on different assumptions about housing. The Spring 2008 scenario used in the London Arc Study assumed the levels of future housing supply proposed in the Regional Spatial Strategy current at the time, the East of England Plan (May 2008). By contrast, the Autumn 2009



scenario used in the 2010 Update assumed that housing would be provided to meet demand, as predicted in the official CLG household projections. In the case of Dacorum, the demand-led 2009 scenario assumed fewer new houses than the supply-led 2008 version, because the East of England Plan aimed to concentrate future growth in the Centres for Development and Change, of which Dacorum was one.

- 2.11 As we shall see in Chapter 4 below, future housing is one of the factors that influences employment, because more housing means a larger resident population, which in turn means more demand for local services such as retail and hence more local workplace jobs (conversely, less housing leads to fewer jobs).
- 2.12 The table below summarises employment change across the three scenarios in the plan period 2006-31.

**Table 2.1 Employment change, Dacorum, 2006-31: three scenarios**

Employment Change Jobs	Spring 2008 scenario	London Arc targets	Autumn 2009 scenario
Industry & warehousing	-2,582	-2,612	-1,666
Offices	12,372	6,937	5,741
Non-B jobs	8,358	8,359	11,315
All jobs	18,148	12,684	15,390

Source: London Arc Study, 2010 Update

- 2.13 For industry and warehousing, as noted earlier the Spring 2008 and London Arc target scenarios were virtually identical, showing a loss of around 2,600 jobs over the plan period. But in the Autumn 2009 scenario, the job loss is less, so by 2031 Dacorum had 900 more jobs than in the earlier scenarios. In absolute terms this is not a large change;
- 2.14 For offices, the story is more interesting. In Spring 2008, OE forecast 12,400 net new jobs in this sector. In the Autumn 2009 forecast, the number of new jobs was reduced by more than half, to 5,700. The explanation presumably lies in OE's, changing macroeconomic view, further to the credit crunch and sharp economic downturn of 2008-2009. But the 2009 scenario was quite close to the London Arc target scenario, which showed 5,700 new office jobs. So the London Arc targets and Autumn 2009 forecast arrived at similar results by different means: in the former case, Dacorum's space requirement was reduced by exporting demand to other areas, and in the latter by the general dimming of economic prospects.
- 2.15 The predicted growth in non-B jobs – which are mostly in consumer and public services such as retail, education and health – was higher in the Autumn 2009 than the Spring 2008 forecast. We do not know the reason for this change and we find it surprising, given that economic prospects deteriorated between the two forecasts; and furthermore Autumn 2009 assumes less housing development (14,700 units in 2006-31 against 17,000 in Spring 2008), which should imply lower population and hence less demand for local services.
- 2.16 Table 2.2 below translates these employment changes into demand for B-class space.

**Table 2.2 Demand for employment space, Dacorum, 2006-31: three scenarios**

Net floorspace change sq m	Spring 2008 scenario	London Arc targets	Autumn 2009 scenario
Industry & warehousing	28,553	27,688	73,944
Offices	222,701	124,872	103,346

Source: London Arc Study, 2010 Update

- 2.17 For industry and warehousing, all three scenarios showed positive demand (an increase in the required floorspace stock) despite falling employment, because the calculations assumed that floorspace per head in warehousing would increase over time, as large-scale strategic warehousing replaced more traditional units<sup>4</sup>. Compared to the London Arc scenarios, the Autumn 2009 version shows more demand for space – an extra 46,000 sq m, which at the standard plot ratio of 40% would require 11.5 hectares of land. Because the difference between different demand scenarios related to only 900 jobs over a 25-year period, it should probably be considered part of the margin of error. The reason why this small number of jobs made quite a large difference to space requirements is the high level of assumed floorspace per worker in warehousing – 70 sq m in 2031.
- 2.18 For offices, the Autumn 09 scenario roughly halved future demand, from 223,000 sq m to 103,000 sq m. But, as we noted earlier in discussing employment change, demand in Autumn 2009 was quite close to the London Arc target scenario, because in this scenario Dacorum exported some of its forecast demand to neighbouring districts.
- 2.19 The 2010 Update went on to compare the forecast demand with the land supply identified at the time. In addition to development completed since 2006 and outstanding planning commitments, the supply figures included changes to the status quo suggested by the consultants, on the basis of qualitative and market analysis. These suggestions related to two kinds of site: existing sites, which might be released for other uses, and new development sites not yet permitted or allocated.
- 2.20 Of these new development sites, the largest was the proposed business park at Maylands Gateway, for which a masterplan had been prepared in 2007. The Update study advised that the quantum of office space being proposed at that site was above what the current market would absorb and suggested part of the site should be allocated for industry/warehousing.
- 2.21 The table below compares this planned supply with the demand estimated earlier. The table only shows the demand scenario which was carried into policy, Spring 2008. This calculation does not appear in the 2010 Update report: that report focused on the other two scenarios, assuming that one of them would be taken forward, because Spring 2008 was pre-recession and no longer relevant. In fact it is the other two scenarios in that study which have become irrelevant – the London Arc Targets because sub-regional planning has been abandoned and Autumn 2009 because the Council did not choose to take it forward.

<sup>4</sup> See London Arc Study for a full explanation.

- 2.22 For industry and warehousing, all three demand scenarios produced similar results, so the conclusion of the Update also applies to the figures in our table. This conclusion was that the market was roughly in balance. The resulting policy advice was that, if the Council wanted to meet the forecast demand for space, it should not allow any reduction in the total of existing, committed and proposed industrial land. Therefore the release of industrial/warehouse sites to other uses should be strictly controlled, and if sites were lost over and above those we identified for release the land lost should be replaced.

**Table 2.3 Market balance, Dacorum, 2006-31, as estimated in 2010 Update**

<b>Net floorspace change sq m</b>	<b>Spring 2008 scenario</b>
<b>Industry &amp; warehousing</b>	
Demand	28,553
Planned supply	62,518
Market balance	33,965
<b>Offices</b>	
Demand	222,701
Planned supply	124,339
Market balance	-98,362

Source: 2010 Update

- 2.23 For offices, our table below shows a large deficit, whereby planned land supply over the plan period is 98,000 sq m short of the forecast demand. To fill this gap, the 2010 Update took forward the solution already proposed in the London Arc study: it propose to export the forecast demand from Dacorum to other parts of the study area. The report added that, in the light of its market analysis, all the forecast demand scenarios appeared over-optimistic, mostly because the employment forecasts seemed overstated, but also because floorspace per head might be falling due to changing working practices. So the report advised that:
- ‘Because planning should not constrain economic growth, because office expansion in Dacorum serves current policy objectives, and because it takes a long time to create major new office areas, it is right in our opinion that the development plan should identify land to accommodate these scenarios, at least indicatively. But planning should also allow for the possibility that the forecast demand may not materialise. So the release should be carefully phased, to avoid counterproductive competition between sites and areas, development and market conditions should be monitored and plans reviewed periodically, perhaps every 3-5 years, in the light of this monitoring.’
- 2.24 Since the 2010 Update was written, there have been changes in the policy context which mean that the study’s conclusions need to be reconsidered. We discuss these changes in the next chapter.



### 3 THE POLICY CONTEXT: RECENT CHANGES

3.1 As mentioned earlier, recent changes in local policy flow from a major national change: the Government's decision to abolish Regional Spatial Strategies (RSSs). Further to this decision, the land provision targets set by the RSSs – in this case the East of England Plan, published in 2008 – are losing their relevance. Depending on case law which is constantly changing<sup>5</sup>, Dacorum is, or shortly will be, free to set its own land provision targets, both for housing and employment. New targets are proposed in the consultation draft of the Council's Core Strategy, published in November 2010. Below, we briefly discuss the old and new targets and the relationship between them.

#### Housing

- 3.2 Under the 2008 East of England Plan, Hemel Hempstead, as one of the Key Centres for Development and Change, was to be a focus for housing development, much of it on land released from the Green Belt. Accordingly, Dacorum's target for 2006-21 was to provide land for a minimum of 680 net new dwellings per year, much of it on land strategically released from the Green Belt. This target was set aside further to a successful legal challenge in 2009, before the abolition of RSSs was announced. With the end of the RSS, the regional policy basis for Hemel Hempstead to become a regional focus for growth has also lapsed.
- 3.3 In Dacorum's draft Core Strategy, Policy CS17: Housing Programme proposes two alternative options for housing land provision in the plan period 2006-2031:
- Option 1: at least 9,835 net additional dwelling units over the plan period.
  - Option 2: at least 11,385 net additional units the plan period.
- 3.4 Once adjusted to take account of dwellings already completed, the Core Strategy options translate into 370 and 430 units a year respectively - less than two thirds of the previous RSS target.
- 3.5 The draft Core Strategy targets are based on supply-side assessments of the borough's capacity for new housing. Option 1 aims to optimise the use of land within defined settlements, while option 2 adds to this with modest extensions to existing settlements. The draft Core Strategy acknowledges that the planned level of housing does not seek to encourage net inward migration, although the Council has almost no control over this. Therefore Dacorum would not be a strategic growth centre for housing as was proposed under the East of England Plan before the successful High Court challenge<sup>6</sup>. The latest CLG projections<sup>7</sup> estimate that 13,200 net new units would be needed to accommodate forecast trends, which include both natural growth and net in-migration. Even the highest of the two supply options falls marginally short of this requirement.

<sup>5</sup> Most recently in the CALA homes judgment of 27<sup>th</sup> May 2011, Court Of Appeal (Civil Division), Case No C1/2011/0297

<sup>6</sup> Case no.s. CO/5911/2008 and CO/5844/2008

<sup>7</sup> Household projections, 2008-2033, England. CLG, November 2010.

## Employment

- 3.6 In the final version of the published East of England Plan (2008), Policy E1 set indicative job growth targets for districts or sub-regional groups of districts. Dacorum was subsumed in a sub-regional target for Hertfordshire; in earlier versions of the emerging Plan, districts were sub-divided differently and Dacorum was part of the Hertfordshire London Arc, which did not cover all of the County.
- 3.7 In planning for employment land, Dacorum and neighbouring Councils soon abandoned the E1 figures in favour of the targets proposed in the London Arc Study (see Chapter 2 above). But, in commissioning that study as a joint evidence base, the Councils supported the principle of planning strategically for employment, so development and jobs would be steered to the best locations regardless of administrative boundaries.
- 3.8 This sub-regional approach has now lapsed and Dacorum Borough Council is planning for employment independently. This does not mean that the Council cannot take account of what is happening in the wider sub-region; indeed, as we shall see, the Core Strategy aims for Dacorum to be a strategic employment centre, which ‘imports’ demand from other areas. But, in the absence of formal arrangements for strategic planning, there is no mechanism to ensure that Dacorum’s plans in this regard are compatible with those of its neighbours. In the concluding section (paragraph 6.9ii) we discuss how this difficulty might be resolved.
- 3.9 In Dacorum’s draft Core Strategy, employment land targets are in Policies CS14 and CS15. Policy CS14 says:
- ‘Up to 18,000 additional jobs will be created in the borough between 2006 and 2031 through sustainable economic development.’*
- 3.10 Policy CS15 adds:
- A minimum supply of land will be identified and retained for B-class uses... Provision will be made to meet a long-term target of 227,000 sq m (net) additional office floorspace and 28,500 sq m (net) additional industry, storage and distribution floorspace over the plan period.’*
- 3.11 Supporting text indicates that these targets are taken from the London Arc Study. From the two demand scenarios shown in that study, the Core Strategy have chosen the Spring 2008 scenario, in which Dacorum meets its own forecast demand, in preference to the London Arc target scenario, in which the sub-region’s demand is redistributed among districts according to a wider spatial strategy. This stance seems in line with the central Government’s localism agenda.
- 3.12 But the text also suggests that, in economic as opposed to housing terms, Dacorum wants to retain a strategic role:
- ‘This relatively high forecast is reflective of... [Hemel Hempstead’s] evolving role as a strategic employment location within Hertfordshire and beyond... Hemel Hempstead is a logical location for employment growth within the London area, due to the availability of land, its proximity to the M1 and [its] ability to provide jobs that are accessible to residents in other districts within south west Hertfordshire.’*

- 3.13 The 'relatively high forecast' of Spring 2008 did not explicitly take account of this strategic aspiration, because the forecasting model does not know about it. Rather, the forecast was based on two broad factors: firstly macroeconomic expectations that now look over-optimistic, and secondly projecting into the future Dacorum's past share of growth in regional and national totals.
- 3.14 We will return to the issue of Dacorum's strategic role later in this report. But first, in the next section, we look at the latest employment forecasts.





## 4 A NEW EMPLOYMENT FORECAST

- 4.1 For this study we have commissioned a new local economic forecast from Oxford Economics, based on the EEFM model that was used in the 2009 and 2010 studies. These new figures ('the Spring 2011 scenario') are based on the latest data and expectations. They show Dacorum's workplace employment from 2006 to 2031 growing by 9,700 jobs, from 68,700 to 78,400. This is just over half the growth forecast in Spring 2008.

### Why has the Forecast Changed?

- 4.2 There are two main reasons why Dacorum's forecast employment growth is so much lower in 2011 than 2008. The first reason, which affects all areas, is that Spring 2011 is a post-recession scenario, reflecting much worse macroeconomic conditions and prospects. The second reason, which is specific to Dacorum, is that Spring 2011 makes different assumptions about housing in the borough. Below, we discuss these factors in turn.

#### *Macroeconomic Conditions*

- 4.3 On the latest figures (first quarter of 2011) UK economic output was 4.1% lower than it was in the first quarter of 2008 – the last pre-recession quarter. In more normal economic times, the UK economy might have grown by 7% to 8% between 2008 and 2011. Another way of expressing how the economic outlook has changed is to compare OE's view of the economic outlook in early 2008 with their current view. In February 2008, OE expected that the UK economy would grow by 13½% in the five years 2007-2012. Combining the actual growth experienced in the UK economy in 2007-2010, together with OE's current (April 2011) expectations for growth in 2011 and 2012, gives growth over the five-year period 2007-2012 of just 0.1% - markedly lower than their view at the start of the 2008-2009 recession. Other forecasters have downgraded their expectations similarly.

#### *Housing Supply*

- 4.4 The second reason Dacorum's forecast employment growth is lower than before is that the Council now propose to provide less housing land than was required by the East of England Plan.
- 4.5 Both Spring 2008 and Spring 2011 are 'supply-led' scenarios: that is, they assume a given housing supply, based on planning policy, which is an input into the forecasting model. Spring 2008 assumed net housing growth of 680 units per annum, based on the East of England Plan. Spring 2011 assumes 400 units p.a, based on the consultation draft Core Strategy. As noted earlier, the Strategy provides two options, at 370 and 430 units p.a. respectively. For forecasting purposes we have taken the mid-point of these two numbers. There would be no point in modelling the two options separately, because the results would be too small to affect our conclusions and recommendations.
- 4.6 In the OE model, output and employment in certain sectors depend largely on the demand generated by the local population. Such population-driven sectors include retail, education and health. Under the 2011 scenario there will be fewer dwellings in Dacorum than under the 2008 scenario, and hence fewer jobs in the population-driven sectors.

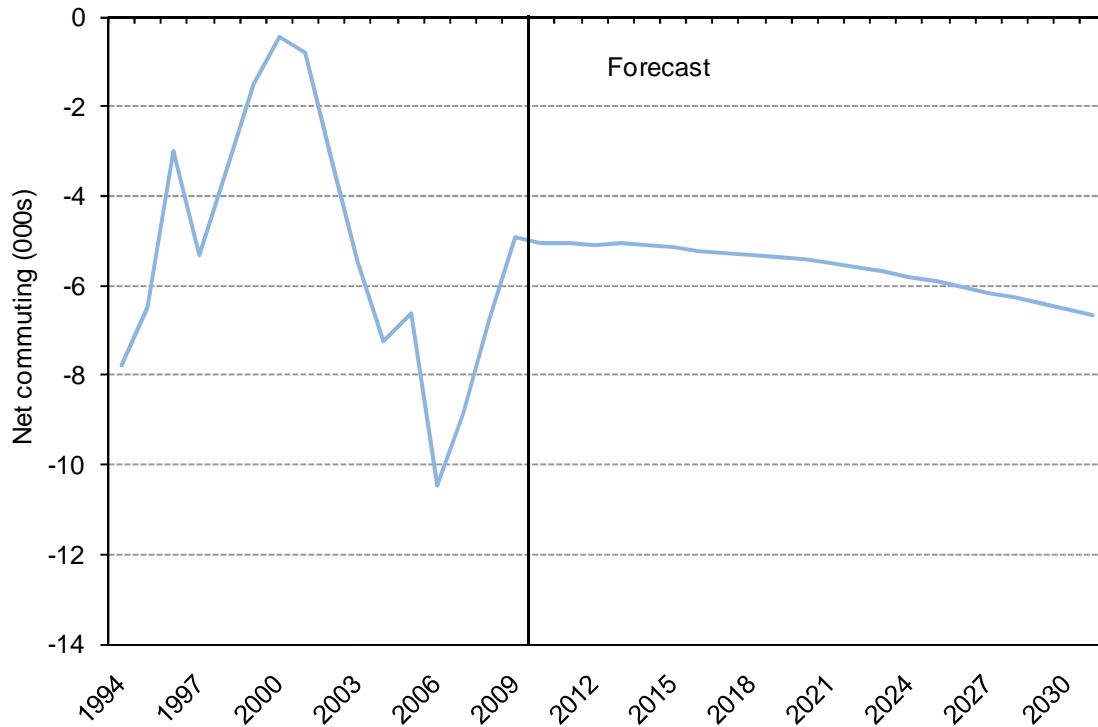
- 4.7 In general the population-driven sectors do not occupy B-class space ('employment space'), so this 'demand-side effect' is unlikely to have a large impact on the demand for such space. Nevertheless, it will have had some impact, because the OE model also includes 'second-round' demand effects, so fewer jobs in the population-driven sectors lead to fewer jobs in the business services sectors that support them. Thus, if there are fewer jobs in retail there will also be fewer jobs in businesses that serve retailers, such as accountants and suppliers of shelving.
- 4.8 We cannot measure how much of the reduction in forecast growth between 2008 and 2011 is due to lower housing targets as opposed to macroeconomic changes or other factors. But we do have OE's estimate of the impact of restricting housing land supply in 2011. As well as the supply-led Spring 2011 scenario we have discussed so far, OE has also provided a 'baseline' scenario for Spring 2011, in which the planning authority provides as much housing land as is required to meet demand. In this unconstrained scenario, net housing growth would be 557 units p.a. and employment growth over the period would be 12,900 jobs. So, in restricting Dacorum's housing growth to 400 units p.a., OE estimates that the Core Strategy is reducing its workplace employment growth by around 3,200 jobs, or 128 jobs p.a. We expect that much of this reduction will be in retail and town centre uses, because as explained earlier fewer housing means fewer residents and hence less demand for these services.

### **Labour Market Alignment**

- 4.9 So far, in discussing employment we have dealt with workplace jobs – the jobs located in Dacorum. In this section, we also look at the resident workforce – employed and self-employed people who live in Dacorum.
- 4.10 As discussed in the last section, lower housing supply will generally mean lower population; this in turn will lead to fewer workplace jobs, through a demand-side effect, as fewer local residents will consume fewer local services. But it may be that reducing population will also reduce workplace employment through a supply-side effect: if Dacorum has fewer residents it will probably have a smaller resident workforce and employers might find it harder or more expensive to attract workers. Alternatively, the number of workplace jobs might be unaffected, but Dacorum might suck in more in-commuters who work in the borough but live elsewhere – perhaps leading to more travel and hence more carbon, more congestion and more pressure on the infrastructure.
- 4.11 To assess these dangers, we look at OE's figures on the net commuting balance – the difference between people working in Dacorum and workers resident in Dacorum, which is also the difference between the number commuting into the borough and out of the borough to work. Figure 4.1 below shows OE's estimates of the past balance for 1994-2010, together with its forecasts of the future balance, based on the Spring 2011 scenario assuming 400 new dwellings a year.
- 4.12 In the past period 1994-2010, Dacorum's estimated balance fluctuated from year to year, but was consistently negative. So there were fewer people working in the borough than workers resident in the borough. But the difference was small: it averaged 5,100 jobs; well under 10% of the borough's employment.

4.13 For the future, OE’s forecast shows a continuing negative balance, and the trend is slightly downward: by 2031, the surplus of resident workers over workplace workers has grown to 6,700. This is more than the past average of 5,100 and well within the range of net commuting flows experienced between 1994 and 2010.

**Figure 4.1: Net Commuting Balance, Dacorum, 1994-2031**



Source: Oxford Economics

4.14 In the Spring 2011 scenario with housing growth of 400 units a year, the borough remains a net exporter of labour, albeit on a modest scale. So there is no reason to expect that in-commuting will rise significantly over the plan period or will become a problem. Nor does the OE scenario predict unusually high or fast-rising economic activity rates, which would signal a tight labour market in which employers suffer labour shortages.



## 5 THE DEMAND AND SUPPLY OF EMPLOYMENT LAND TO 2031

### Demand

- 5.1 To forecast the demand for space we proceed in two steps, following the method used in our earlier studies. Firstly we estimate how many future jobs will occupy B-class space and secondly we use employment densities (floorspace per head) to translate these jobs into space requirements.
- 5.2 The first step is shown at Table 5.1, which estimates the breakdown by land use of the total jobs shown in the latest (Spring 2011) forecast. For comparison, the table also jobs by land use as forecast in the Spring 2008 scenario, which underpins the consultation draft of the Core Strategy.

**Table 5.1 Employment change, Dacorum, 2006-31: two scenarios**

Employment Change Jobs	Spring 2008 scenario	Spring 2011 scenario
Industry & warehousing	-2,582	-3,444
Offices	12,372	7,284
Non-B jobs	8,358	5,863
All jobs	18,148	9,702

Source: Oxford Economics, RTP

- 5.3 For industry and warehousing, in the latest forecast the loss of jobs is greater by some 900 jobs than in the Spring 2008 scenario. Over a 25-year forecasting period, this difference should be considered part of the margin of error, especially as part of it is due to a visible error: in the 2008 scenario we slightly underestimated the number of warehousing jobs in 2006, and therefore over-estimated the forecast growth to 2031.
- 5.4 For offices, the latest scenario shows only 7,200 new jobs, just over half of the 12,400 that were forecast in Spring 2008. As noted earlier, this reduction is likely due to the deterioration of the macroeconomic outlook in from autumn 2008 onwards.
- 5.5 The table below translates these employment forecasts into future demand for space.

**Table 5.2 Demand for employment space, Dacorum, 2006-31: two scenarios**

Net floorspace change sq m	Spring 2008 scenario	Spring 2011 scenario
Industry & warehousing	28,553	-30,045
Offices	222,701	131,103

Source: RTP

- 5.6 The latest forecast now shows a small reduction in industrial/warehouse space, as opposed to the small increase in the earlier version. As mentioned earlier, we believe that these changes are part of the margin of error. By contrast, for offices there is a very significant difference between the two scenarios. As one would expect from the jobs numbers discussed above, the latest version almost halves the demand for net additional space, from 223,000 sq m in the Spring 2008 scenario to 131,000 sq m in Spring 2011.

## Planned Supply

5.7 Table 5.3 below shows the planned supply of employment land identified and proposed in Spring 2011. The table is slightly complicated and we explain it below.

**Table 5.3 Planned supply of employment land, Dacorum, Spring 2011**

Row	Floorspace change Sq m	Industrial & Warehousing			Offices		
		Gains	Losses	Net Change	Gains	Losses	Net Change
1	Completions 2006-11	67,480	-41,492	25,988	18,686	-33,052	-14,366
2	Outstanding permissions	28,799	-10,808	17,991	26,693	-3,935	22,758
3	Outstanding allocations & proposals	26,660	-18,030	8,630	122,655	-1,000	121,655
<b>4</b>	<b>Total supply planned by Council</b>	<b>122,939</b>	<b>-70,330</b>	<b>52,609</b>	<b>168,034</b>	<b>-37,987</b>	<b>130,047</b>
5	Update suggestions: existing sites		-29,960	-29,960	10,000	-1,600	8,400
6	Update suggestions: development sites	11,099		11,099	6,498		6,498
<b>7</b>	<b>Total Update suggestions</b>	<b>11,099</b>	<b>-29,960</b>	<b>-18,861</b>	<b>16,498</b>	<b>-1,600</b>	<b>14,898</b>
<b>8</b>	<b>Total potential supply</b> (= Council plans plus Update suggestions)	<b>134,038</b>	<b>-100,290</b>	<b>33,748</b>	<b>184,532</b>	<b>-39,587</b>	<b>144,945</b>

Source: Dacorum Borough Council, RTP

Outstanding permissions include developments under construction.

- Rows 1-4 of the table show the impact on employment space of developments completed and outstanding planning permissions, allocations and Council proposals. The underlying detail is in the appendix to this report.
  - These data were supplied by the Council. In relation to Maylands Gateway, our table assumes delivery of 'Option 4', which would provide 122,200 sq m offices and 18,500 sq m of industrial/warehouse space ('other B uses'). This is more offices and less B2/B8 space than suggested in the 2010 Update.
  - The Council has asked us also to test an alternative plan for Maylands Gateway, known as Option 3, which would provide no industrial/warehouse space and a total of 177,120 sq m of offices. This option is not in the table but is discussed in paragraph 5.18 below.
  - The totals at Row 4 show the land supply outstanding at Spring 2011, as planned by the Council. This provides net additional space of 53,000 sq m for industry /warehousing and 130,000 sq m for offices.
- Rows 5-7 summarise proposals made in the 2010 Update study, based on a qualitative assessment of the borough's existing and proposed employment sites.
  - Row 5 shows our suggestions on existing employment sites, mostly for the release for other uses of existing sites which we consider no longer fit for purpose. The figures are taken from Table 4.1 of the 2010 Update report referenced earlier.
  - Row 6 suggests possible sites for B-class development over and above the planning commitments and proposals shown earlier. The figures are taken from Table 4.2 of the 2010 Update report, except that they now exclude Maylands Gateway, because it is now covered by the Council proposals at Row 3.
  - Row 7 totals the previous two rows to show total changes to the status quo as suggested in the 2010 Update. Now that our earlier suggestions for Maylands Gateway have been removed, these totals are modest. They amount to a net loss of 19,000 sq m of industrial/warehouse space and a net gain of 15,000 sq m of office space.

- Finally Row 8 shows total planned supply on the assumption that the suggestions made in the 2010 Update are implemented, except at Maylands Gateway, where these suggestions are superseded by later Council proposals. This provides net floorspace gains of 34,000 sq m for industry/warehousing and 145,000 sq m for offices. The totals are close to those in the 2010 Update.

## Market Balance and Policy Implications

- 5.8 The table below compares this planned supply – both without and with the Update suggestions - with the demand forecast earlier, to assess the balance of the market over the plan period.

**Table 5.4 Market balance, Dacorum, 2006-31**

<b>BALANCE</b>		
<b>Net floorspace change</b>	<b>Industrial &amp; Warehouse</b>	<b>Office</b>
<b>Sq m</b>		
<b>Forecast demand</b>		
Spring 2011 scenario	-30,045	131,103
<b>Planned supply</b>		
Supply planned by Council	52,609	130,047
Potential supply (after Update suggestions)	33,748	144,945
<b>Supply less demand</b>		
<b>Based on supply planned by Council</b>	<b>82,654</b>	<b>-1,056</b>
<b>Based on potential supply</b>	<b>63,793</b>	<b>13,842</b>

Source: RTP

### Industry and Warehousing

- 5.9 For industry and warehousing, the table shows an oversupply between 64,000 and 83,000 sq m, depending on the supply scenario chosen. Taken literally, this would suggest that the Council could release around 15-20 ha of existing or proposed industrial/warehouse sites for other uses in the plan period, in addition to the sites already proposed or suggested to be lost, and still meet demand.
- 5.10 But in reality we believe that this calculation is pessimistic and subject to a large margin of error. This is partly because the demand forecast behind it is surrounded by much uncertainty and probably errs on the pessimistic side. As we saw in Chapter 2 above, forecasts of industrial/warehousing demand have been very unstable in the past. One reason for this is that, at the assumed warehousing density of 70 sq m per worker, small differences in job numbers result in large differences in land requirements.
- 5.11 Moreover, the demand-supply calculation at Table 5.4 assumes that all the planned development in our schedules actually takes place and there are no windfall losses (or gains) of industrial/warehouse space beyond those we have identified. In reality, there will be continuing market pressure to release employment sites for housing: as noted in the 2010 Update, windfall losses in recent years have been running at some 9,000 sq m a year; if this rate of loss continues, the oversupply we have assessed would run out less than halfway in the Plan period. Once lost, industrial sites are difficult to replace, so if the next

round of forecasting shows positive demand once again it may be too late to rescue the necessary supply.

- 5.12 In planning for industry/warehousing, we should also bear in mind the market analysis in the London Arc report, which suggests that market demand may exceed the forecast. This may be because land supply for these uses has been constrained in recent years, especially for strategic warehousing, which is often unpopular. Therefore, if the Council identifies more land than the forecast requirement, it may still find that the sites provided are well occupied, partly through attracting demand from the wider sub-region.
- 5.13 For all these reasons, we would suggest that Dacorum's land provision target for industry/warehousing over the plan period be for zero net change in industrial/warehouse land. (This is not significantly different from the draft Core Strategy target, which would provide for a net increase of 28,500 sq m.) If this target is accepted, the market balance to 2031 (assuming the Update suggestions for specific sites are accepted) is an oversupply of 48,000 sq m, which considered over the 25-year plan period is not significant. The market is roughly in balance.

### Offices

- 5.14 For offices, the table shows reasonable balance between forecast demand and planned supply, regardless of the supply scenario chosen. So in theory there is no need to change anything. If the Council wishes to meet the forecast demand, it should continue to allocate all the land identified our supply schedules for offices. And it should not allow the loss of existing office sites over and above the ones shown in the schedules, unless it can be shown that there is no demand for a site, in which case it should be replaced.
- 5.15 In practice, however, and in contrast to industry and warehousing, the market analysis in earlier reports suggests that the risk is on the downside: demand may be significantly below the forecast, as the earlier evidence base studies already suggested. In these circumstances, our advice is similar to that of the 2010 Update. Because planning should not constrain economic growth, and because current policy suggests that Dacorum would like to expand its economic role, it seems reasonable to plan indicatively for the forecast demand over the 25-year plan period. So, as a land provision target for the Core Strategy, the Council should adopt the figure of 131,000 sq m of net additional floorspace. Given this target, and assuming planned supply in line with the Update recommendations, the supply-demand balance over the plan period is some 14,000 sq m, as shown in the last row of Table 5.4. This is a very small figure, not significantly different from zero. Looking ahead to 2031, the forecast demand and identified supply are in balance.
- 5.16 However, planning policy should allow for the possibility that the forecast demand may not materialise. Therefore, land supply and the infrastructure investment needed to support office development should be phased over the plan period; targets and allocations should be reviewed regularly in the light of actual take-up, market conditions and the latest economic forecasts; and there may be managed release of office sites which are no longer attractive, viable or suitable for offices.
- 5.17 Given these comments, and in the light of the qualitative analysis in earlier reports, of the two options under consideration for Maylands Gateway we support Option 4, which



provides less office space than the alternative, and devotes part of the site to industry/warehousing. Even in Option 4, we fear that the land provided for offices at the site will exceed demand and much of it may not be taken up over the plan period.



## 6 CONCLUSIONS AND RECOMMENDATIONS

### Quantitative Targets

- 6.1 The economic future of Dacorum and its neighbours has been much studied in recent years. Forecasts have been recast to match ever-changing circumstances. In the last five years we have seen proposed housing targets change repeatedly as the RSS emerged; a once-in-a lifetime economic shock; finally agreed housing targets set aside by the courts; sub-regional groupings defined and re-defined before being finally abandoned; and finally the promised abolition of the RSS. This in turn has resulted in another new housing target and a likely end to regional planning for the foreseeable future.
- 6.2 All this explains why Dacorum needs to reconsider its land provision targets for employment yet again. It is difficult to do this for an individual district in isolation. Forecasts for smaller areas are more unreliable, because they are more dependent on personal judgment as opposed to modelling, the factual data they use are less robust, and what happens in any one place is affected by what happens in neighbouring areas. In an ideal world, we would begin with forecast scenarios for the wider sub-region and review them critically in consultation with a sub-regional group of districts, as in the London Arc study. Since this is not an option, we accept the OE 2011 scenario as the best available estimate of future demand, and we use mind, and based it in ways that take account of its limitations and its context.
- 6.3 Bearing this in mind, and based on the discussion in the last chapter, we suggest that the next iteration of the Core Strategy might say:
- i *Economic forecasts suggest that employment in Dacorum may potentially grow by around 10,000 jobs in the plan period 2006-31. The Council will aim to provide the land that is needed to accommodate this growth.*
  - ii *To this end, land provision will be made to accommodate 131,000 sq m of net additional office floorspace and zero net change in industrial and warehouse floorspace over the plan period 2006-31.*
  - iii *These targets will be reviewed by 2016 in the light of take-up, market conditions and economic prospects.*
- 6.4 We suggest that the first of these points replace the wording at Policy CS14, that ‘Up to 18,000 additional jobs will be created in the borough between 2006 and 2031’. The existing wording is not quite right in logic, because it is not within the Council’s power to create jobs (except for its own employees). So the 18,000 (now 10,000) jobs are an *expectation* rather than a *target*: the Council *estimates* that up to 18,000 (or 10,000) jobs may be created (by other people), and it *proposes* (through its planning powers) to make sure that there is enough land to accommodate these jobs. The CS14 wording also carries risks in practice, because it could be taken to imply that higher growth may not be acceptable, and this implication could be misused to oppose development.
- 6.5 In relation to point ii above, the suggested land provision figures *are* targets, because providing land, unlike creating jobs, is (largely) within the Council’s control. To recap briefly,

the broad rationale for both figures is that the Council wishes to encourage economic growth; it also knows that the true demand-supply position is uncertain, because on the demand side forecasts are imperfect, and on the supply side some of the land identified may not come forward. Therefore the Council will err on the side of generosity in providing employment land, to try and ensure that planning does not constrain economic growth by providing too little land. The office figure is based on the Spring 2011 OE forecast, which is probably an optimistic scenario. The industrial/warehouse figure rounds upwards the OE forecast, which seems to be a pessimistic scenario.

- 6.6 With regard to site allocations and development management DPDs, under the updated targets most of the recommendations of the 2010 SW Herts Update still hold. The calculations in the last chapter of this report suggest that the supply already identified (including the site-specific suggestions made in the 2010 Update and implementation of Option 4 at Maylands Gateway) roughly matches the targets. The borough's land supply, including the release of unwanted employment sites for other uses, should be managed so that this balance is maintained.
- 6.7 To deliver this in practice, we suggest a similar policy stance to that described in the 2010 Update report:
- Where an existing employment site come forward for redevelopment for other uses, over and above existing commitments:
    - If the site is suggested for release in the 2010 Update, the Council should release it.
    - Otherwise the site should normally be retained in its existing use, unless
      - It is no longer commercially attractive or suitable for that use in the long term, or
      - The Council decides that another use has priority.
  - If a site we have not recommended for release is in fact released, other things being equal it should normally be replaced by finding development land in addition to the sites we have identified (for example, it may be that the masterplanned redevelopment of the town centre results in losses of industrial/warehouse space in areas such as Paradise).
  - But additional land could be released and not replaced if some of the losses we have recommended do not happen in practice, or if there are windfall gains, where new development occurs on site we have not identified.
- 6.8 The site-specific qualitative advice we provided in the 2010 Update still holds. In particular, for Maylands Gateway we support Option 4, because it allocates less land for offices, closer to our earlier recommendations than the alternative being considered by the Council, Option 3. Even so, we are worried that office demand may fall short of supply at this site over the plan period.

### Other Advice

- 6.9 The Council's study brief requests 'brief but specific advice' on a number of questions. These questions are set out and summarily answered below. Where a question has already been answered earlier in this report, we simply provide a cross-reference.

- i *How the new targets compare to previous forecasts. This should include an explanation of why these previous forecasts are no longer considered to be robust and the broad assumptions upon which they are based).*

Answered at length in Chapter 5 above.

- ii *How Dacorum's land provision targets might be amended to take into account Dacorum's aspirations for the Maylands Business Park and role in the wider Hertfordshire economy i.e. what target should be included within the Core Strategy and what the implications are of not providing sufficient land to meet these needs.*

To provide a quantified 'strategic provision target', we would need demand forecasts and supply data for all parts of Hertfordshire and a discussion with all districts, as in the London Arc Study. Therefore, we cannot provide such a target at present.

But this need not be a problem, because, as Table 5.4 shows, Dacorum has already identified all the development land required to meet its forecast local demand for the whole Plan period, going forward another 15 years. Therefore, for the next five years or longer, in addition to this local demand the borough will have ample capacity to meet any demand 'exported' from other parts of Hertfordshire. If there are signs that the identified supply is insufficient, the Council will have ample time to reconsider the position and identify additional land as required.

This is one of the reasons why we suggest a review of employment land policy in 4-5 years time. By then, it should be possible to quantify demand and supply for the wider sub-region, as all the Hertfordshire districts should have clear policies and land allocations. The present extreme confusion about regional and sub-regional planning should also have cleared, and there may also be new arrangements for sub-regional planning, perhaps through the proposed 'duty to co-operate' and the Hertfordshire LEP, which should be more established by then. A CLG Ministerial Statement dated 23<sup>rd</sup> March 2011, which is a material consideration for plan-making and development control, advises as follows

*'Local planning authorities should... press ahead without delay in preparing up-to-date development plans, and should use that opportunity to be proactive in driving and supporting the growth that this country needs. They should make every effort to identify and meet the housing, business and other development needs of their areas, and respond positively to wider opportunities for growth, taking full account of relevant economic signals such as land prices. Authorities should work together to ensure that needs and opportunities that extend beyond (or cannot be met within) their own boundaries are identified and accommodated in a sustainable way, such as housing market requirements that cover a number of areas, and the strategic infrastructure necessary to support growth.'*<sup>8</sup>

<sup>8</sup> See <http://www.communities.gov.uk/statements/planningandbuilding/planningforgrowth> visited 1st June 2010

We understand this to say that some authorities do not have the physical capacity to provide the necessary sites, and some demand is footloose across administrative boundaries, so it cannot be definitely tied to particular local authority areas. In these cases, planning should steer development and growth to the places that can sustainably accommodate it, irrespective of administrative boundaries, and as close and similar as possible to where it wants to go. Places that have economic potential, but are short of deliverable land should export demand to their less constrained neighbours, and these neighbours should accept it.

- iii *Implications of the new jobs target for the approach towards employment and economic development set out within the Draft Core Strategy (November 2011)*

Addressed in the last section, 'Quantitative Targets'.

- iv *Whether it is appropriate to amend previous assumptions on development densities for B-Class uses in the light of changing working practices (and if not why not).*

An argument could be made for reducing assumed floorspace per worker from 18 sq m to 16 or conceivably less, probably in stages over the plan period. In our view there is no point in changing the assumption at this time, for three main reasons. Firstly, the evidence is not conclusive. Secondly, the Core Strategy's economy-friendly stance suggests that where there is uncertainty planning should err on the generous side. Thirdly, changing the assumed density by say 2 m per worker (11%), which would also reduce the estimated requirements by 11%, would not materially alter our advice. Our recommendations already take account of the possibility that floorspace per worker may fall.

- v *The impact on the jobs target of two different development scenarios for Maylands Gateway.*

We advise on these alternatives at paragraphs 5.17 and 6.8 above.

- vi *How the new figures fit in with conclusions of Strategic Sites Study – and where they differ significantly why this is so.*

The Strategic Sites Study (SSS) does not address the same questions as this study. It does show a range of future employment scenarios for Hertfordshire districts including Dacorum, but these figures illustrate broad choices and aspirations; we do not see that they could be interpreted as up-to-date demand forecasts. We cannot see any link between the SSS's employment scenarios and its recommendations, which are about identifying and bringing forward strategic employment sites.

- vii *The broad impact of increasing or decreasing the housing target from the 400 dpa assumed within the study and whether or not this is likely to be materially significant in terms of the Core Strategy.*

As mentioned in paragraph 4.4 above, varying the target between 370 and 430 dpa would not materially affect our conclusions and recommendations.

- viii *The issue of the Borough's broad alignment of jobs and workers - as this has not been considered in previous reports but could become an issue now that Dacorum is being considered separately from the wider London Arc.*

This issue is discussed in paragraphs 4.9 above. We see no reason to expect that under the forecast scenario Dacorum will suffer labour shortages or excessive or growing in-commuting.

- ix *Advice regarding what potential there is for Dacorum to absorb some jobs growth from adjoining authorities due to their own potential under-provision and/or the sub-regional role played by Maylands.*

See question ii above.

- x *Whether any greenfield land to the east of Maylands (within St Albans City and District) will be required in the plan period in order to met the recommended jobs growth target.*

Not required to meet the target now proposed. We do advise that this target be revised in five years or so.





## APPENDIX

### Supply Schedules

The tables below show the detail behind the land supply planned by the Council at Table 5.3. They were provided by the Council.



**Table A1 Development Completed April 2007-March 2011**

<b>Name</b>	<b>Location</b>	<b>B1a,b Gains sq m</b>	<b>B1a, b Losses sq m</b>	<b>B1c, B2, B8 Gains sq m</b>	<b>B1c, B2, B8 Losses sq m</b>
31 High St	HH (Cent)		52		
283 High St	Berkhamsted		90		
23 High St	HH (Cent)		230		
76 Western Road	Tring	170			
20 Kings Road	Berkhamsted		185		
104A High Street	Tring		138		
R/O 6 Belton Road	Berkhamsted				357
Adj Spectra House	HH (E)	541			
Castle Mill	Berkhamsted		936		
Harrow Yard, Akeman Street	Tring		596		
Gorseside, Berkhamsted	Berkhamsted		330		
Twinmar Ltd	HH (E)			900	
Aviation House, Northbridge Road	Berkhamsted		550	650	
Park Lane	HH (Cent)	865	897		
Hertfordshire House	HH (Cent)	1,650	1,158		
Golden West Foods Ltd	HH (E)	1,952			
221-233 High Street	Berkhamsted		1,325		
Opp School House Farm	Markyate				560
Kings Langley Riding School, Chipperfield Road	Markyate	325			
Primrose Engineering Co Ltd, Adeyfield Road	HH (Other)				1,100
Spectra House, Boundary Way	HH (E)	2,412			1,858
5 & 6, Maxted Road	HH (E)			2,744	2,290
The Boxmoor Trust Centre, London Road	HH (S)	400	120		
The Mill Site, Wilstone	Rural		1,215		
Former Kodak Site, Leighton Buzzard Road	HH (Cent)		14,120		
Eeb Depot, Whiteleaf Road	HH (S)		1,428		
Former Dupont Works, Maylands Avenue	HH (E)			10,104	5,499
Horizon Point, Eastman Way	HH (E)			14,901	

Name	Location	B1a,b Gains sq m	B1a, b Losses sq m	B1c, B2, B8 Gains sq m	B1c, B2, B8 Losses sq m
Lucas Site, Maylands Avenue	HH (E)	10,160			
Stags End House, Gaddesden Row	HH (Other)		840		
Gossoms End/Stag Lane	Berkhamsted		7,572		
Land Off Stag Lane, Buncefield Oil Terminal, Green Lane,	Berkhamsted				6,000
Gist, Three Cherry Trees Lane	HH (E)			31,738	
Ashlyns Hall, Chesham Road	Berkhamsted			953	
Hill & Coles Farm, Flamstead	Rural	250		136	
Former Tyre Services Ltd., Paradise	HH (Central)	131		395	
Rectory Farm	Kings Langley			1,100	
Woodcroft Farm, Potten End	Rural			571	
Land at Old Beechwood, Flamstead	Rural			236	
Dunsley Farm	Tring			555	
Morningside Farm	Tring			113	
Boxted Farm	Berkhamsted			1,977	
17 Hammer Lane	HH			234	
Units 1-4 Swallow Park	HH (E)			173	
Toms Hill Estate, Aldbury	Rural				2,645
439A London Road	HH				133
1-4 Kimps Way	HH				255
215 London Road	HH		68		
The Stables, R/O 53 Marlowes	HH (central)		33		
47 Maylands Avenue	HH (E)		285		4,160
Unit G1, Cleveland Road	HH (E)				1,860
14 High Street	Kings Langley		561		
The Old Chapel	Tring		190		
Unit 5A, Ickniel Way Industrial Estate	Tring		191		
Units E&F Maylands Wood Estate	HH (E)				8,423
V P Autos	HH				115
235-237 London Road	HH (S)				395
A5 Furniture warehouse, Flamstead	Rural				1,879
Water End Garage, Water End	Rural				228
22 McDonald Way	HH (E)		172		394
Sunswept, Buncefield Lane	HH (E)				420
Former Express Dairy, Riversend Road	HH (S)				2,481
Rear of 18-19 Henry Street	Tring				107
Land at Meadow Farm, Gaddesden Row	Rural				315
190 St Agnells Lane, Hemel Hempstead	HH (E)				18
<b>Total</b>		<b>18,686</b>	<b>33,052</b>	<b>67,480</b>	<b>41,492</b>

**Table A2 Planning permissions, allocations and Council proposals outstanding, March 2011**

<b>Name</b>	<b>Planning status</b>	<b>B1a,b Gains sq m</b>	<b>B1a, b Losses sq m</b>	<b>B1c, B2, B8 Gains sq m</b>	<b>B1c, B2, B8 Losses sq m</b>
Paradise Farm, Potash Lane, Long Marston, Tring	Permission			285	
Ex Trident Car Sales, Hicks Road, Markyate, St. Albans	Permission	187			
235-237 London Road	Permission	410			395
H E Stringer Ltd, Icknield Way Industrial Estate, Icknield Way, Tring, Hp234jz	Under construction				695
Balshaw Heath, Bullbeggars Lane, Potten End, Berkhamsted, Herts	Permission		229		
Boxted Farm, Berkhamsted Road, Hemel Hempstead, Hp1 2sq	Permission			1,977	
New Ground Farm	Permission	1,675			
Site B, Ex-Dickinson	Permission	2,484			
Rose Bank Cottage, Byways, Gravel Path	Permission	105			
Yard, R/O Grange Farm, Bovingdon Green	Permission	690			
A5 Furniture Warehouse, London Road	Permission	2,170			1,879
Whitehouse Farm, Gaddesden Row	Permission	312			
235-237 London Road	Permission				275
4-6 Mark Road	Permission	182			
16-17 Mark Road	Under construction	225			
Former Kodak Site, Leighton Buzzard Road/, Cotterells, Hemel Hempstead	Permission	6,983			
Ex Trident Car Sales	Permission	102			
Unit 10 Icknield Way	Under construction	123			
V P Autos, Unit 6, 559 London Road	Under construction			144	
Knoll House, Maylands Avenue	Permission			1,899	
<b>Name</b>	<b>Planning status</b>	<b>B1a,b Gains sq m</b>	<b>B1a, b Losses sq m</b>	<b>B1c, B2, B8 Gains sq m</b>	<b>B1c, B2, B8 Losses sq m</b>
Paradise Farm, Potash Lane	Permission			285	
Former Express Dairy, Riversend Road	Under construction			9,703	

11 & 12 Maxted Road	Permission			3,285	
Unit A, Marchmont Farm, Piccotts End Lane	Permission			187	187
Fuji House, Boundary Way	Permission	143			
Sunswept, Buncefield Lane	Under construction			840	
3 Com Centre, Boundary Way	Permission	9,813			
Ex Axis Point, Eastman Way	Under construction	916	1,305	4,339	2,815
Morningside Farm, Icknield Way	Permission	173		194	
Land Adj. Orchard Cottage, Champneys	Permission			611	
Unit A, B & C Northbridge Road	Permission			1,775	1,745
1 Frogmore Road Industrial Estate	Permission		550	550	
Woodwells Farm, Buncefield Lane	Permission			2,725	
17 Manor Street, Berkhamsted	Permission		118		
Land At Craig Rowan, Chapelcroft, Chipperfield	Permission		143		
The Freight Yard, London Road, Hemel Hempstead	Permission		750		
34c Mark Road, Hemel Hempstead	Permission		16		
7 Mark Road, Hemel Hempstead	Permission		118		
16 Avebury Court, Hemel Hempstead	Permission		160		
45 High Street, Kings Langley	Permission		280		
40-41 High Street, Tring	Under construction		266		
R&R House, Northbridge Road, Berkhamsted	Permission				225
The Paddocks (Western Road) And Access From Miswell Lane, Tring	Permission				325
Dixons Wharf, Dixons Gap, Wilstone, Tring	Permission				2,267

Name	Planning status	B1a,b Gains sq m	B1a, b Losses sq m	B1c, B2, B8 Gains sq m	B1c, B2, B8 Losses sq m
105-107 High Street	Permission		157		
The Factory, Hogpits Bottom	Permission			168	
14 High Street	Permission		561		
16 Avebury Court	Permission		160		
93 Western Road	Permission		272		
The Old Rectory, Sutton Court	Permission		338		
Land at British Film Institute	Permission		681		
<b>Permissions subtotal</b>		<b>26,693</b>	<b>3,935</b>	<b>28,799</b>	<b>10,808</b>
GAS BOARD SITE	Allocation				7,330
Spencers Park	Allocation			4,000	
Boundary Way (N)	Allocation				
Miswell Lane, Tring	Allocation			3,200	
Maylands Gateway	Emerging proposal	122,200		18,500	
Hicks Rd Replacement	Emerging proposal	455	1,000	960	10,700
<b>Allocations etc subtotal</b>		<b>122,655</b>	<b>1,000</b>	<b>26,660</b>	<b>18,030</b>
<b>Total</b>		<b>149,348</b>	<b>4,935</b>	<b>55,459</b>	<b>28,838</b>