



Hertford and Ware Employment Study

Final Report

Client: East Hertfordshire District Council

June 2016

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Executive Summary

1. The purpose of this study is to advise EHDC on the future role of employment sites in Hertford and Ware in supporting economic growth. The report will inform the preparation of the new East Herts District Plan. The report also identifies what actions could be taken with respect to employment floorspace in Hertford and Ware to meet the objectives set out by EHDC in its Economic Development Vision and Action Plan (EDV&AP).
2. The research undertaken will inform those priorities of the EDV&AP that focus on enabling entrepreneurs and business start-ups; and lobby for the right infrastructure. Aspects of the work will also inform the EHV&AP priorities regarding vibrant town centres; and ensuring that EHDC is a business friendly Council.
3. A higher proportion of the working age population of Hertford and Ware are in work when compared to the District and County average. Similarly the proportion of Hertford and Ware residents who have a degree level qualification is above the EHDC and County average. Over a third (36%) of the working residents of Hertford and Ware also work in the two towns, with another 7% working elsewhere in East Herts.
4. This implies that over half of the working residents of Hertford and Ware work outside of the two towns and outside of East Herts. Significant numbers work in London and the local authorities immediately surrounding East Herts. This mirrors the pattern of East Herts as a whole where more East Herts residents work outside the District than in the District.
5. There were some 27,100 jobs in Hertford and Ware in 2014. Employment in the two towns has declined by some 800 jobs since 2009. The sectors that employ the largest number of people are the professional, scientific and technical services sector; manufacturing; business administration and support services and education. Hertford also has a strong representation of public sector employment.
6. On average the stock of employment floorspace (B1,B2, B8) has declined since 2008 by an average of 1,100 sq m per annum. However in 2014-15 almost 13,300 sq m (214,400 sq ft) of employment floorspace was lost; and it is anticipated that there will have been a further significant loss of employment floorspace in 2015-16. Most of this employment floorspace has been lost to residential development. This is a matter of serious concern.
7. Vacancy rates for all types of employment floorspace are now at very low levels – around 2% for office space and less than 2% for industrial space. Empty property that is not being marketed is excluded from these figures. It is known that a large amount of unoccupied floorspace is not being marketed because the owners are anticipating redeveloping property – overwhelmingly for residential uses.
8. The current portfolio of employment sites are of widely varying quality and size, but there are no multi-occupancy sites in Hertford and Ware that are likely to be able to compete with the best sites in the A1 (M), M11 or M25 North corridors. Most of the sites in Hertford and Ware cater for the needs of essentially local businesses, and are unlikely to appeal to inward investors.
9. However, intrinsically Hertford and Ware should be able to compete for small and medium sized occupiers looking for business space in south east Hertfordshire and south west Essex. However the current portfolio of sites and premises is not ideal for this purpose. The best site on offer is the Foxholes Business Park which has good accessibility, visibility and has a variety of B1a, B1c, B8 and Sui Generis property, and has high levels of

occupancy. All other sites have limitations that disadvantage Hertford and Ware from attracting non-local occupiers.

10. Of the better multi-purpose industrial estates, Mead Lane and Crane Mead have access problems. Along with the Marsh Lane Industrial Estate, these estates have some quality modern business space, but generally mixed in with much less satisfactory property. Smaller industrial estates perform an important role in meeting the needs of a wide variety of smaller businesses including those needing low cost premises. The least satisfactory industrial estate in terms of both quality and access is the Hertford Industrial Estate (Caxton Hill).
11. There is anecdotal information that there has been a significant loss of small office space in Hertford and Ware suitable for business of up to 10 people. Given the large number of such businesses in the study area, it is recommended that EHDC investigate options for providing shared business space in the form of business centres and move on accommodation. One option is to consider if whether space can be freed up in the public sector estate in Peg's Lane.
12. It is recommended that EHDC develop a strategy that seeks to stem the on-going loss of employment floorspace in Hertford and Ware. Absolutely essential to achievement of this objective is ensuring that EHDC can demonstrate that it has a 5 year housing land supply. EHDC should resist the loss of further employment sites, unless it is convincingly proved they are not fit for purpose; even then the aim should be to ensure some element of employment floorspace provision through mixed use development.
13. However, it will not be easy to resist the further loss of employment sites, so it is important that EHDC develop a strategy for re-provision of employment sites and making the most of existing employment sites in terms of land still available for development and improving the overall appearance, access, and visibility of industrial estates such as Marsh Lane, Crane Mead and Mead Lane; and that the scope to allocate a new site (or sites) around the intersection of the A414 and A10 on land not suited to residential development is investigated.
14. As part of this medium to long term strategy for the re-provision of employment floorspace, there is a need to plan for provision of good quality B1 floorspace in an attractive, well accessed strategic location somewhere in the southern part of East Herts, which implies a location on the A414 or A10, or at the intersection of these two trunk roads. Previous work for EHDC has identified the strategic role of Bishop's Stortford as a business location in the east of the District.
15. This investigation into new strategic site allocations in the south central part of East Herts would also need to consider the possibility of land allocation for employment use on the south eastern boundary of East Herts on the A414, as well as how to secure employment land development within East Herts around junction 8 of the M11.
16. In the light of the significant reduction of employment floorspace over recent years, and the fact that there is very limited supply of available space, Wessex Economics would recommend that EHDC seek to prevent further loss of employment land in Hertford and Ware in the short to medium term.
17. Bringing forward new employment sites that have strong market appeal should be regarded as a corporate priority given the announced by the Chancellor of the Exchequer in October 2015 that by the year 2000 local authorities will be able to retain 100% of business rates levied in their area. This will be accompanied by a substantive move away from central government core grant funding of local authorities.

1. About this Report

Introduction and Scope of Work

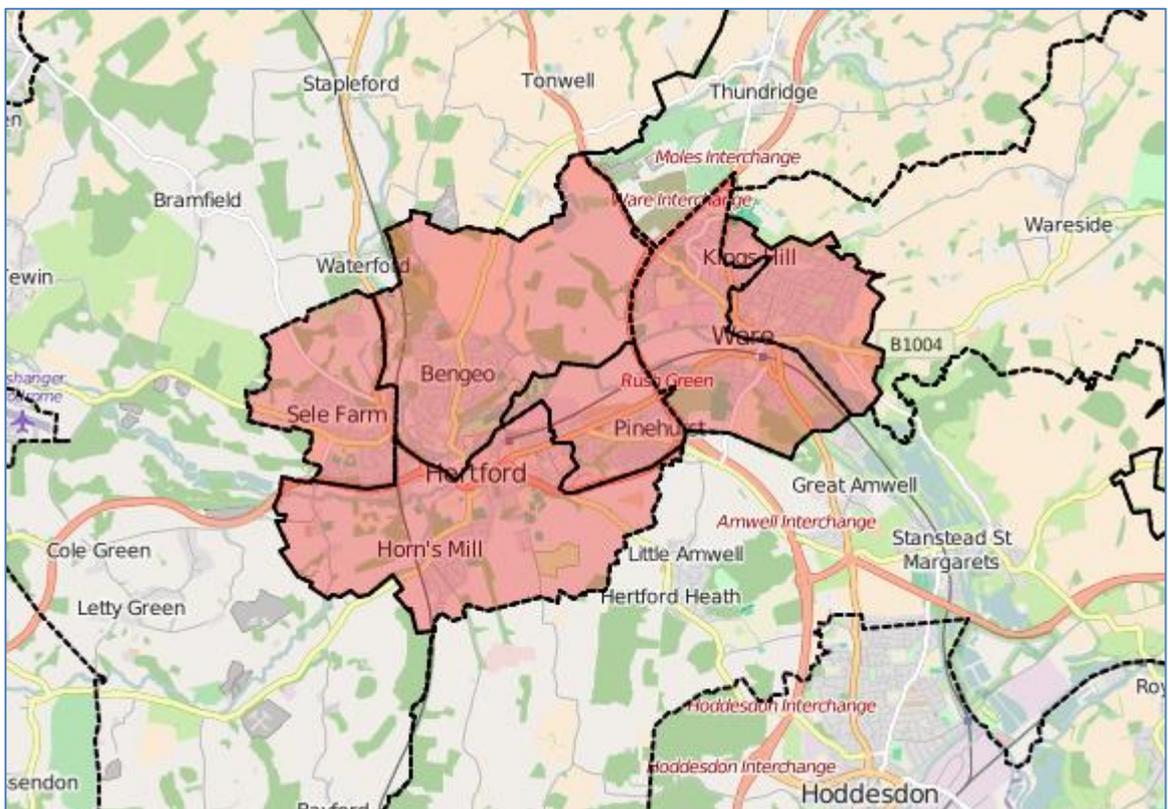
- 1.1 This report has been prepared on behalf of East Herts District Council. The broad purpose of the study is three fold.
- First, to assess the current strengths and weaknesses of the two towns of Hertford and Ware and advise the Council on how Hertford and Ware can continue to prosper through the growth of business and employment, including an assessment of the types of business which are likely to underpin the local economy.
 - Second, to give the Council advice on the requirement for employment sites for offices, industry and warehousing (B1, B2 and B8 use classes) in Hertford and Ware, including an assessment of quality of existing employment sites in the two towns and the contribution each site makes to the overall portfolio of sites.
 - Thirdly to set out an overall strategy for provision of employment floorspace in Hertford and Ware, bearing in mind the two towns' existing strengths and future opportunities. In doing so, Wessex Economics is mindful of the District-Wide Economic Development Vision and Action Plan approved by the Council.
- 1.2 Thus the broad purpose of the study is therefore to advise EHDC on the future role of employment sites in Hertford and Ware in supporting economic and housing growth. The work is being undertaken in the context of ongoing work on the preparation of a new East Herts District Plan. The report identifies what actions could be taken with respect to employment floorspace in Hertford and Ware to meet the objectives set out by EHDC in its Economic Development Vision and Action Plan.
- 1.3 An additional reason why the study has been commissioned is that a number of employment sites in the two towns have recently been granted permission for residential development. Further applications for residential development are expected for sites currently in employment uses. The work will help inform EHDC's decisions on the balance achieved between retaining employment sites and the need for new homes.
- 1.4 The full Study Brief is presented in Appendix 1. In summary the brief identifies 6 specific tasks, as follows:
- A review of existing employment studies in so far as they relate to Hertford and Ware.
 - An audit of the quality and character of existing employment areas in Hertford and Ware to determine how fit for purpose they are.
 - An assessment of current and future market demand and supply for employment land and premises.
 - An assessment of the barriers preventing employment areas from thriving, and what interventions could be applied to overcome these barriers.

- A review of emerging Planning Policy in terms of the national and local context relating to employment land provision.
- Establishing an economic vision and related objectives focused on employment land provision for the Hertford and Ware area as a whole.

The Study Area

- 1.5 At the outset of the study it is important to define the Study Area since this is the area for which key data on employment and workforce characteristics are reported. The area of Hertford and Ware for which data is presented in this report is as shown in Figure 1 which includes all the urban area of the two towns and some of the rural areas immediately around the two towns.¹

Figure 1: The Study Area – Hertford and Ware Defined



Report Structure

- 1.6 The report is structured as follows:
- Section 2 presents a summary of the key aspects of EHDC’s Economic Development Vision and Action Plan focusing on those aspects relevant to this study.
 - Section 3 presents an economic profile of the Hertford and Ware covering the workforce characteristics, employment, travel to work patterns and accessibility.

¹ ONS defined Middle Super Output Areas 12,13, 14, 15, 16 and 17. Note part of the Marsh Lane Industrial Estate falls outside the area, which will result in a small under-reporting of employment in the Hertford and Ware area.

- Section 4 presents an analysis of the stock of employment (B1, B2, B8) floorspace in Hertford and Ware, change in the stock and analysis of rents and vacancies compared against surrounding urban areas.
- Section 5 presents a summary profile of each of the employment sites in Hertford and Ware, other than the GSK site, which is in single company ownership.
- Section 6 presents an analysis of the strengths and weaknesses analysis of the Hertford and Ware economy, with a particular focus on Hertford and Ware as a business location.
- Section 7 discusses future policy for the provision of employment land in Hertford and Ware and makes recommendations to EHDC and strategy and planning for employment land in the two towns.

2. EHDC's Economic Development Vision and Action Plan

- 2.1 EHDC published its Economic Development Vision and Action Plan (hereafter referred to as the EDVAP) for the District in May 2016. The document provides an up to date statement of what EHDC regards as the priorities for economic development in East Herts and therefore provides the context within which any strategy for employment in the twin towns of Hertford and Ware needs to be developed.
- 2.2 This section summarises the EDVAP, drawing out selectively the elements of the document which are particularly relevant to this study. The full document is presented in Appendix 2. The EDVAP is structured around six priority themes, as shown in Figure 2. This study is particularly relevant to Priorities 2 and 6 and aspects of the study are relevant to Priorities 4 and 1. The report does not address the issues of the rural economy (Priority 3) or the visitor economy (priority 5).

Figure 2. The Priority Themes/Outcomes of the EHDC Economic Development Vision and Action Plan

1. **A business friendly Council:** *We will ensure we are supporting our businesses as 'customers' of council services as well as listening to the needs of the business community.*
2. **Enabling entrepreneurs and business start-ups:** *We will encourage wealth creation in the District and ensure businesses can access a wide range of locally sourced services.*
3. **Supporting the rural economy:** *We will maximise investment into the rural economy and ensure it remains competitive.*
4. **Vibrant town centres:** *We will ensure our town centres meet the needs and wants of our residents and visitors.*
5. **Supporting the visitor economy:** *We want to raise the profile of local attractions and support businesses in their supply chain.*
6. **Lobbying for the right infrastructure:** *We will work with key partners to ensure East Herts can support growth in the right places at the right time.*

Source: EHDC

- 2.3 It is useful to summarise the key issues and actions for Priorities for 2, 6, 4 and 1 as set out in the EDVAP since these represent the current assessment of the Council in terms of needs and the sort of actions that the EHDC is anticipating taking.

Priority 2: Enabling Entrepreneurs and Business Start Ups

- 2.4 The EDVAP highlights that micro-businesses and small to medium enterprises (SMEs) account for the majority of businesses in the East Herts. The GSK Research Centre in Ware is the obvious exception to this general statement.² EHDC therefore recognises the importance of maintaining an environment in which existing SMEs and new businesses can thrive. One particular issue identified by EHDC is the

² GSK also has major operations in Stevenage and Harlow.

need for greater support for small businesses, including incubation space and stronger business networks.

- 2.5 EHDC works with Wenta, an enterprise agency operating throughout Hertfordshire and Bedfordshire. The organisation is an independently funded not-for-profit organisation that supports business start-ups and small business development by providing incubator space, advice and training. Wenta run an incubator facility located at the Ware Campus of the Herts Regional College. The organisation is largely funded through the ownership and management of its network of business centres run by its subsidiary company, Wenta Business Services.
- 2.6 The other key actions identified by EHDC under this theme are to work with the Hertfordshire Local Enterprise Partnership (LEP) to establish a Growth Hub – an enterprise network for local businesses to support services such as finance, human resources and training advice; helping businesses to assess business start-up provision, identifying gaps in provision and taking action to improve business support; and working to promote entrepreneurship in schools. These actions are District-wide, but likely to be focus on the District’s major business concentrations including Hertford and Ware.

Priority 6: Lobbying for the Right Infrastructure

- 2.7 The EDVAP identifies the fact that the stock of commercial business space in the District as a whole is older and of poorer quality than neighbouring authorities as a particular issue in the District as a whole. This is a topic examined in detail in this report as regards commercial (B1-B2-B8) property in Hertford and Ware. The EDVAP also identifies that accessibility is an issue in terms of capacity and quality of existing road infrastructure and rail services.
- 2.8 Issues surrounding the quality of the strategic transport infrastructure in the District are issues that EHDC has to work with Hertfordshire County Council and Hertfordshire Local Enterprise Partnership (Herts LEP). Bishop’s Stortford is located in the M11/A10 corridor. EHDC note that the M11 corridor has been identified a key area for future growth nationally, and there is a particular emphasis on securing investment in improved transport networks in the M11/A10 corridor, which link London, Stansted Airport and Cambridge.
- 2.9 EHDC indicate in the EDVAP that it will work with Hertfordshire LEP, the County Council and the London Stansted Cambridge Consortium on identifying infrastructure requirements for the M11/A10 corridor; and with Herts LEP on addressing the strategic needs of businesses in East Hertfordshire.

Priority 4: Vibrant Town Centres

- 2.10 This study is only indirectly relevant to the issues facing the District’s town centres - Hertford, Bishop’s Stortford and Ware. The EDVAP notes that the retail offer is declining in town centres, but in part this is compensated for by the growth of restaurants, bars and cafes. The decline in retail spending will be a reflection of national trends, with the shift to on-line buying. However this decline in retail spending is being partly compensated for by increased consumer spending in food and drink establishments which is not so dependent on 9-5 trade.

- 2.11 The EDVAP notes that these trends are reinforced because of the high proportion of the resident population working outside of the towns in which they live, while the number of people who work in the town is smaller than the number of working residents of the two towns. The fact that the employment base of the two towns is relatively small means that Hertford and Ware town centres do not benefit as much as other large employment centres from the 9-5 expenditure of employees. In contrast there is more opportunity to capture expenditure outside of normal working hours when the resident population returns to their home town in terms of food and drink establishments and late opening of food stores.
- 2.12 The EDVAP indicates that it is important that consideration is given to the interaction of the town centre retail and leisure offer and the existing and future provision of employment floorspace in plan making. The EDVAP also proposes undertaking feasibility work with town centre businesses around establishing Business Improvement Districts (BIDs); and increasing the number and quality of special events and markets in town centres designed to improve footfall.
- 2.13 The relationship between retention or increasing the supply of employment floorspace in and around town centres and improving the viability and vitality of town centres is discussed later in this report.

Priority 1: A Business Friendly Council

- 2.14 The key actions identified by EHDC under this priority that are of relevance to this study are the commitment of the Council to undertake an analysis of business needs, specifically around the demand for employment and commercial floorspace; the need for new business incubation space and 'second stage' space for new businesses seeking to growth; and sector or specific industry opportunities in East Herts, for example in the creative industries and in R&D.
- 2.15 This report and the recommendations that flow from it can be regarded as a contribution to this EHDC priority.

3. An Economic Profile of Hertford and Ware

3.1 This section presents an economic profile of the combined urban area of Hertford and Ware, as shown in Figure 1 in Section 1. Analysis is presented under the following headings:

- Economic Activity and Unemployment
- Resident Skills and Occupations
- Employment and Self Employment
- Travel to Work Patterns

Economic Activity and Employment

3.2 In 2011, around 45,600 people lived in Hertford and Ware (2011 Census) representing 33% of the population of East Hertfordshire District as a whole. The working age population of Hertford and Ware (aged 16-74) accounts for around 73% (33,100) of the total population of the two towns, a similar percentage to that in East Herts as a whole.

3.3 Of those residents who are of working age, 77% were economically active in 2011 (see Figure 3). This is somewhat higher than the District average of 75% and higher than the other benchmark areas used (Hertfordshire, East of England and England as a whole). This indicates that a relatively high proportion of the population of Hertford and Ware, when compared to the District as a whole, are actively participating in the labour force.

Figure 3: Economic Activity of Hertford and Ware Residents

	Residents aged 16-74	Economically Active		EA in Emp.		Economically Active		Economically Inactive
		% of residents	In employment	Employee	Self Employed	Unemployed	Full time student	
Hertford and Ware	33,100	77.1%	92.8%	84.7%	15.3%	4.1%	3.1%	22.9%
East Hertfordshire	100,100	75.4%	93.0%	82.4%	17.6%	3.8%	3.2%	24.6%
Hertfordshire	806,200	74.2%	90.9%	82.9%	17.1%	4.7%	4.3%	25.8%
East of England	4,245,500	71.6%	90.5%	83.8%	16.2%	5.3%	4.2%	28.4%
England	38,881,400	69.9%	88.8%	84.3%	15.7%	6.3%	4.9%	30.1%

Source: Census 2011

3.4 The higher representation of people who are economically active is likely to be attributable to the fact that on average the two towns have a higher proportion of younger adults (aged 20-44), and a lower proportion of older adults of working age (aged 45-64) (see Figure 4). This may reflect the preferences of younger adults and families to live in towns rather than rural areas, which may in turn reflect a preference for urban living, ease of access to rail stations for those commuting, and differentials of urban and rural house prices.

Figure 4: The Age Profile of Hertford and Ware Residents

	Hertford and Ware	East Hertfordshire
Age 0-4	7.0%	6.1%
Age 5-9	6.2%	6.2%
Age 10-14	5.5%	6.2%
Age 15-19	5.0%	6.0%
Age 20-24	4.9%	4.7%
Age 25-29	6.3%	5.4%
Age 30 to 44	23.2%	20.7%
Age 45 to 59	21.2%	22.5%
Age 60 to 64	4.6%	5.2%
Age 65 to 74	8.2%	9.2%
Age 75 to 84	5.6%	5.6%
Age 85 to 89	1.4%	1.4%
Age 90 and over	0.9%	0.8%

Source: 2014 Mid Year Population Estimates, ONS

- 3.5 Of those that are economically active, almost 93% (in 2011) were in employment, which is line with the District average but above the level of County, Region and of England (see Figure 3). In contrast, unemployment levels for Hertford and Ware are slightly above the District average with 4.1% (1,050) of economically of active residents unemployed compared to 3.8% for East Hertfordshire.
- 3.6 The higher level of unemployment in Hertford and Ware than in the District may be linked, in part, to greater provision of social housing in the two towns than the District’s rural areas and a younger population. However the Census figure for unemployment is still are lower than County, regional and national levels.
- 3.7 More recent information on unemployment is drawn from Jobseekers Allowance (JSA) claimant count records. These data identify the number of people claiming JSA and National Insurance Credits at Job Centre Plus local offices. In February 2016, the number of JSA claimants in Hertford and Ware was around 280. This compares with 640 for East Hertfordshire as a whole and indicates that around 43% of JSA claimants live in Hertford and Ware whilst it only accounts for 33% of the population.
- 3.8 It is noteworthy that self-employment levels of those residents in employment in Hertford and Ware (15.3%) are below the District average of 17.6%. Although not available below District level, more recent data from the Annual Population Survey (APS) suggest that self-employment levels across East Hertfordshire have been rising since 2011 and one might expect the same trend to have occurred in the towns of Hertford and Ware.

Resident Skills and Occupations

- 3.9 The qualification profile of Hertford and Ware residents reveals that the towns are characterised by a relatively well qualified resident workforce. The proportion of residents having level 4 qualifications and above (degree level or higher) is 36% compared to 34% for East Herts as a whole, and 26% for the region (see Figure 5). The proportion of residents of Hertford and Ware with no

qualifications is 17% which is in line with the District average and below County, regional and national averages.

Figure 5: Qualification Levels of Hertford and Ware residents, 16+

	Hertford and Ware	East Hertfordshire	Hertfordshire	East of England	England
No qualifications	17.3%	17.2%	18.2%	22.5%	22.5%
Level 1 qualifications	12.9%	13.5%	13.8%	14.6%	13.3%
Level 2 qualifications	15.6%	16.7%	15.7%	16.2%	15.2%
Apprenticeship	3.0%	3.2%	3.2%	3.7%	3.6%
Level 3 qualifications	11.9%	11.9%	11.8%	11.8%	12.4%
Level 4 qualifications and above	35.6%	33.5%	32.1%	25.7%	27.4%
Other qualifications	3.6%	4.0%	5.0%	5.4%	5.7%

Source: Census 2011

- 3.10 The availability of high level skills in an area is generally regarded as a prerequisite for securing higher value-added investment. In principle the relatively highly skilled workforce in Hertford and Ware should act as an attraction to businesses looking to locate in the wider area.
- 3.11 However in the case of Hertford and Ware, the high proportion of residents with high level qualifications may reflect the degree to which the two towns are commuter towns, with many residents travelling into London or to larger urban centres to the west or east of East Hertfordshire. Local based businesses therefore probably have to compete for well qualified personnel with London based employers and employers in the northern M25, the A1(M) and M11 corridors.
- 3.12 It should be borne in mind that these statistics relate to the resident workforce of Hertford and Ware and does not capture the qualifications of those who work, but do not live, in the two towns. GSK, employs around 1,250 people in its R&D and manufacturing centre in Ware, and probably employs significant numbers of highly qualified people. However it is probable that many of these commute into the GSK campus from outside of Hertford and Ware.
- 3.13 The relatively highly skilled workforce of Hertford and Ware is reflected in the occupational profile of working age residents of Hertford and Ware, with an above average proportion of residents employed in higher skilled occupations. Around 52% of the working age residents of Hertford and Ware are employed as managers, professionals and associate professionals, compared to 50% for East Herts as a whole and 41% for the region as a whole (see Figure 6).

Figure 6: Occupational Structure of Hertford and Ware residents, aged 16-74

	Hertford and Ware	East Hertfordshire	Hertfordshire	East of England	England
1. Managers, directors and senior officials	13.6%	14.7%	12.9%	11.4%	10.9%
2. Professional occupations	22.0%	20.3%	20.2%	16.7%	17.5%
3. Associate professional and technical occupations	16.7%	15.5%	14.6%	12.9%	12.8%
4. Administrative and secretarial occupations	12.4%	12.4%	12.1%	12.0%	11.5%
5. Skilled trades occupations	9.9%	10.5%	10.2%	12.0%	11.4%
6. Caring, leisure and other service occupations	7.2%	7.9%	8.4%	9.3%	9.3%
7. Sales and customer service occupations	5.5%	6.0%	7.5%	7.9%	8.4%
8. Process plant and machine operatives	4.7%	4.9%	5.5%	7.3%	7.2%
9. Elementary occupations	7.9%	7.7%	8.6%	10.6%	11.1%

Source: Census 2011

Employment

- 3.14 In 2014 there were around 27,100 jobs in Hertford and Ware, 600 fewer jobs than five years previously in 2009³. This loss of jobs is not reflected across the District as a whole, nor across the other benchmark areas. Indeed East Hertfordshire experienced a growth of 3,800 jobs (6.4%) across the same time period (see Figure 7). The other benchmark areas have also experienced a growth in employment levels. Since the resident population of Hertford and Ware has been growing, this implies that Hertford and Ware in recent years has become less of a significant employment centre and out-commuting is likely to have increased since 2009.

Figure 7: Hertford and Ware Total Employment⁴, 2009-2014

	2009	2014	Change	% Change
Hertford and Ware	27,700	27,100	- 600	-2.2%
East Hertfordshire	59,800	63,600	3,800	6.4%
Hertfordshire	535,700	581,300	45,600	8.5%
East of England	2,540,000	2,658,400	118,400	4.7%
England	24,068,100	25,151,200	1,083,100	4.5%

Source: BRES 2009-2014

- 3.15 Further analysis of the official data on employment (see Figure 8) indicates the largest sectors of employment are as follows:
- professional, scientific and technical services (18%)
 - manufacturing (13%)
 - business administration and support services (10%)
 - education (7.7%)

- 3.16 The most significant loss of employment has occurred within the business administration and support services sectors, with 2,100 job losses since 2009. Other sectors to have experienced a loss

³ Note part of the Marsh Lane Industrial Estate falls outside the area, which will result in a small under-reporting of employment in the Hertford and Ware area.

⁴ Employment includes employees plus the number of working owners. It therefore includes self-employed as long if they are registered for VAT or PAYE schemes. However, the majority of self-employed people are not registered for VAT or PAYE.

of employment include the arts, entertainment recreation and other services sector (-500); property (-200); public administration and defence (-400); retail (-200) and financial and insurance (-100).

- 3.17 Those sectors to have experienced gains in employment over the time period include the information and communications sector (+600); wholesale (+300); and the accommodation and food services sector (+300).
- 3.18 It should be borne in mind that analysing employment data at a small area level, such as aggregated MSOAs for Hertford and Ware, the results can often be influenced by one or two larger employers relocating or moving out of the area. Therefore the local trends may not reflect accurately the trends in those sectors in areas covering a larger geography.

Figure 8: Employment Change by Sector, 2009-2014

	Actual			%			East Hertfordshire % Change
	2009	2014	Change	2009	2014	% Change	
1 : Agriculture, forestry & fishing (A)	-	-	-	0.0%	0.0%	-	115.2%
2 : Mining, quarrying & utilities (B,D and E)	-	100	100	0.0%	0.4%	-	-21.1%
3 : Manufacturing (C)	3,900	3,400	- 500	14.0%	12.5%	-12.8%	-9.8%
4 : Construction (F)	1,400	1,500	100	5.0%	5.5%	7.1%	-22.7%
5 : Motor trades (Part G)	300	400	100	1.1%	1.5%	33.3%	39.2%
6 : Wholesale (Part G)	1,000	1,300	300	3.6%	4.8%	30.0%	26.7%
7 : Retail (Part G)	1,900	1,700	- 200	6.8%	6.3%	-10.5%	-6.3%
8 : Transport & storage (inc postal) (H)	500	600	100	1.8%	2.2%	20.0%	-10.9%
9 : Accommodation & food services (I)	1,200	1,500	300	4.3%	5.5%	25.0%	42.5%
10 : Information & communication (J)	900	1,500	600	3.2%	5.5%	66.7%	65.5%
11 : Financial & insurance (K)	600	500	- 100	2.2%	1.8%	-16.7%	7.3%
12 : Property (L)	700	500	- 200	2.5%	1.8%	-28.6%	-42.0%
13 : Professional, scientific & technical (M)	3,400	4,800	1,400	12.2%	17.7%	41.2%	40.2%
14 : Business administration & support services (N)	4,800	2,700	- 2,100	17.3%	10.0%	-43.8%	7.5%
15 : Public administration & defence (O)	2,300	1,900	- 400	8.3%	7.0%	-17.4%	-22.8%
16 : Education (P)	2,100	2,100	-	7.6%	7.7%	0.0%	5.5%
17 : Health (Q)	1,600	1,800	200	5.8%	6.6%	12.5%	17.9%
18 : Arts, entertainment, recreation & other services (R,S,T and U)	1,300	800	- 500	4.7%	3.0%	-38.5%	-11.9%
Total	27,800	27,100	- 700	100.0%	100.0%	-2.5%	6.3%

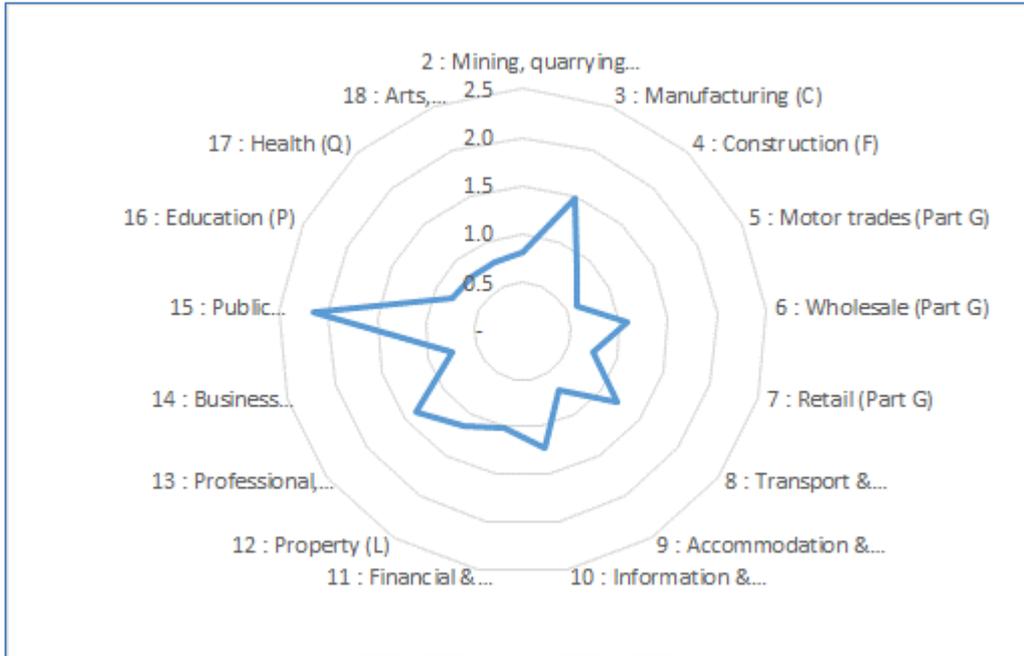
Source: BRES 2009-2014

- 3.19 Reflecting on the pattern of employment change since 2009, it is probably no surprise that employment in public administration has fallen, with all public authorities facing budget constraints since 2010 which has often meant staffing reductions; the reductions in employment in the arts, entertainment recreation and other services sector may also be linked directly or indirectly to reduced public funding for the arts and related activities.
- 3.20 The substantial loss of employment in the business administration and support services sectors (and the additional losses in finance and insurance) is of interest. It may be indicative of the fact that Hertford and Ware may in times past have been regarded as a suitable location for back office or support functions linked to London based firms or activities.
- 3.21 It may be that the two towns are no longer regarded as low cost locations, and such activities have gravitated to areas with substantially lower cost bases in the UK or overseas. In part the growth of

the information and communications sector may have compensated for this pattern of sectoral change in terms of requiring similar levels of skills.

- 3.22 However, overall the reduction is because these types of jobs will have reduced the demand for office floorspace; or it may be that lack of suitable office floorspace or the cost of office floorspace in Hertford and Ware has been a factor in these jobs being lost to two towns. It may also be that such functions are being brought together in larger centres.
- 3.23 Given the relatively modest retail base of both Hertford and Ware, the effects of the 2008-09 recession, and the rise of on-line retailing it is not surprising that jobs have been lost in the retail sector in the two towns over the period 2009-2014. However, loss of jobs in retailing has been more than outweighed by employment growth in the accommodation and food services sector and the wholesale sector (which might be related to the growth in on-line trade).
- 3.24 Figure 9 illustrates the relative concentration of sectors of employment in Hertford and Ware compared to the District as a whole by using a Location Quotient for each sector. The analysis indicates that Hertford and Ware has relatively high concentrations of employment within the public administration and defence sector (LQ 2.1), the manufacturing sector (LQ 1.5), and the professional, scientific and technical sector (LQ 1.4).
- 3.25 Sector specialisms in the public sector, manufacturing and the professional, scientific and technical sector are not surprising given that Hertford is the location of Hertfordshire County Council's and EHDC's head offices; employment at, or related to, GSK's Ware Campus is likely to be the key factor explaining the relative concentration in manufacturing and the professional, scientific and technical sector.
- 3.26 A more detailed breakdown of employment sectors for Hertford and Ware is provided in Appendix 3 showing those sectors in Hertford and Ware with 50 or more jobs. The three largest employment sectors in Hertford and Ware are education (2,100), public administration and defence (1,900), and the manufacture of basic pharmaceutical products (1,900). The first two of these sectors are likely associated with Hertford's status as the county town of Hertfordshire and largest urban area whilst the latter will be associated with the presence of GSK within the area and all the associated and spin-off employment linked to GSK.

Figure 9: Employment Sector Location Quotients for Hertford and Ware, 2014



Source: BRES 2009-2014 & Wessex Economics Analysis

The Business Base of Hertford and Ware

- 3.27 There are just under 3,000 places of employment in Hertford and Ware. These include businesses, charitable and public sector organisations. Figure 10 shows that there are 15 large employers across the two towns, defined as those that employ more than 250 people.
- 3.28 However, the vast majority (86%) of businesses in Hertford and Ware employ fewer than 10 people, and the majority of the remaining employers have only 10-49 employees. Of those businesses that employ less than 10 people, 83% have 0-4 employees. It is encouraging to note the business base of the area has increased by 13% (340 businesses) since 2011 with growth across all size bands of business except for medium-sized businesses.
- 3.29 In comparison to the District as a whole, Hertford and Ware has a slightly below average proportion of micro businesses (less than 10 employees) with 85.5% compared to 87.8% for East Herts as a whole; but in contrast has a slightly higher proportion of large businesses (0.5%) compared with East Hertfordshire (0.3%).

Figure 10: Hertford and Ware Business Count

Employment Sizeband	2011		2015		% Change
Total	2,585		2,925		13%
Micro (0 to 9)	2,195	84.9%	2,500	85.5%	14%
Small (10 to 49)	315	12.2%	350	12.0%	11%
Medium-sized (50 to 249)	65	2.5%	65	2.2%	0%
Large (250+)	10	0.4%	15	0.5%	50%

Source: UK Business Count, Local Units

3.30 In terms of the business base by sectors of employment, Figure 11 shows that local businesses are concentrated within the following sectors: professional, scientific and technical services (19%); construction (12%); and business administration and support services (10%).

Figure 11: Hertford and Ware Business Count by Sector

Industry	Total	%	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
13 : Professional, scientific & technical (M)	550	18.8%	500	40	5	5
4 : Construction (F)	340	11.6%	320	15	0	0
14 : Business administration & support services (N)	295	10.1%	250	35	10	0
10 : Information & communication (J)	245	8.4%	225	15	5	0
7 : Retail (Part G)	230	7.9%	200	25	5	0
18 : Arts, entertainment, recreation & other services (R,S,T and U)	185	6.3%	170	15	0	0
9 : Accommodation & food services (I)	175	6.0%	140	35	0	0
3 : Manufacturing (C)	155	5.3%	120	30	5	0
6 : Wholesale (Part G)	135	4.6%	100	30	5	0
17 : Health (Q)	135	4.6%	85	40	10	0
12 : Property (L)	125	4.3%	115	10	0	0
11 : Financial & insurance (K)	85	2.9%	70	10	0	0
8 : Transport & storage (inc postal) (H)	80	2.7%	70	10	5	0
16 : Education (P)	70	2.4%	45	15	10	0
5 : Motor trades (Part G)	65	2.2%	55	5	0	0
15 : Public administration & defence (O)	30	1.0%	10	10	5	5
1 : Agriculture, forestry & fishing (A)	10	0.3%	10	0	0	0
2 : Mining, quarrying & utilities (B,D and E)	10	0.3%	5	5	0	0
Total	2,925	100.0%	2,500	350	65	15

Source: UK Business Count, Local Units

Travel to Work Patterns

3.31 Of some 24,500 residents of Hertford and Ware who were in work in 2011, over a third (36% or 8,820 people) also worked in Hertford and Ware. This group is made up of 2,380 (9.7%) of working residents of Hertford and Ware who work from home; and a larger group of 6,440 Hertford and Ware residents who travel to a place of work in Hertford and Ware (see Figure 12). An additional 1,660 Hertford and Ware residents work elsewhere in East Hertfordshire District bringing the total proportion of Hertford and Ware residents that both live and work somewhere in East Hertfordshire to almost 43%, including those that work from home.

Figure 12: Hertford and Ware Residents, Travel to Work Patterns

Place of Work	No.	%
Hertford and Ware	6,440	26.3%
Mainly Work at/from home	2,380	9.7%
Remaider of East Herts	1,660	6.8%
East Herts Total	10,480	42.8%
Other Local Authorities	11,970	48.9%
No fixed Place	1,980	8.1%
Off shore/outside UK	60	0.2%
Total	24,490	100.0%

Source: Census 2011, rounded to the nearest 10

3.32 By implication over half (57%) of the residents of Hertford and Ware who work commute out of East Hertfordshire to work. Figure 13 shows those places where Hertford and Ware residents work in large numbers. A quarter (25%) of the residents of Hertford and Ware who are in work, work in the adjacent local authorities of Welwyn Hatfield, Broxbourne, Harlow, Stevenage, and Epping Forest. At least 17% of the remainder work in London.

Figure 13: Where Residents of Hertford and Ware Travel to Work

Place of Work	Residents of Hertford and Ware	
	No.	%
Hertford and Ware	6,440	32.1%
Remainder of East Herts	1,660	8.3%
East Herts Total	8,100	40.4%
Welwyn Hatfield	1,910	9.5%
Broxbourne	1,720	8.6%
Westminster, City of London	1,670	8.3%
Enfield	690	3.4%
Harlow	620	3.1%
Stevenage	570	2.8%
Camden	410	2.0%
Islington	330	1.6%
Tower Hamlets	330	1.6%
Epping Forest	290	1.4%
Other Local Authorities	3,430	17.1%
Total	20,070	100.0%

Source: Census 2011, Table WU01EW, rounded to the nearest 10

3.33 In terms of those who work in Hertford and Ware, Figure 14 shows that almost 33% of jobs in Hertford and Ware are filled by Hertford and Ware residents, and a further 17% by other East Herts residents, bringing the total number of jobs in Hertford and Ware filled by residents East Herts to 9,730 persons. This means that, based on 2011 Census data, almost 50% of the jobs in Hertford and Ware are filled by East Hertfordshire residents⁵.

3.34 Residents of other local authorities who work in Hertford and Ware typically live in largest number in the local authorities bordering East Herts. Thus of the jobs in Hertford and Ware, 12% are filled by residents of Broxbourne, 5% by residents of Welwyn Hatfield, 5% by residents of Stevenage, 4% by residents of North Hertfordshire, and 4% by residents of Harlow.

⁵ The 2011 Census of Population analysis identifies 19,640 people working in Hertford and Ware of which 9,730 (50%) are East Herts residents. BRES data shows that in 2014 there were 27,100 jobs in Hertford and Ware which might imply that the proportion of jobs in Hertford and Ware filled by East Herts residents is lower; however caution has to be applied in using data from different data sets/time periods.

Figure 14: Where those who Travel to Work in Hertford and Ware Live

Usual Residence	Hertford and Ware In-commuters	
	No.	%
Hertford and Ware	6,440	32.8%
Remainder of East Herts	3,290	16.8%
East Herts Total	9,730	49.5%
Broxbourne	2,250	11.5%
Welwyn Hatfield	970	4.9%
Stevenage	910	4.6%
North Hertfordshire	820	4.2%
Harlow	780	4.0%
St Albans	410	2.1%
Enfield	400	2.0%
Epping Forest	330	1.7%
Central Bedfordshire	280	1.4%
Uttlesford	260	1.3%
Other Local Authorities	2,500	12.7%
Total	19,640	100.0%

Source: Census 2011, Table WU01EW, rounded to the nearest 10

4. The Market for Business Space in Hertford and Ware

4.1 This section examines trends in the availability of business space in Hertford and Ware and the characteristics of the market for offices (B1), industrial (B2) and warehousing (B8) business space. Data and analysis under the following headings:

- The Stock of Business Properties and Available Floorspace
- Annual Change in the Stock of Business Premises 2008-2015
- Hertford and Ware Market Context
 - Offices
 - Industrial premises
- Conclusion

The Stock of Business Premises in Hertford and Ware

4.2 Data is available from Valuation Office Agency (VOA) on the stock of business premises in Hertford and Ware in 2008. In 2008 there were just over 1,300 business premises in Hertford and Ware, with just over a third (35%) being shops, just over a quarter (27%) being offices, one fifth (20%) being factories and the remainder (14%) being warehouses (see Figure 15).

Figure 15: Stock of Business Premises in Hertford and Ware, 2008

	Count	% of properties	Total sq m	% of floorspace	Av. Sq m of property
Retail	456	34.8%	69,000	14.1%	151
Offices	360	27.4%	91,000	18.5%	253
Factory	268	20.4%	221,000	45.0%	825
Warehouse	183	13.9%	100,000	20.4%	546
Other	45	3.4%	10,000	2.0%	222
Total	1312	100.0%	491,000	100.0%	374

Source: Valuation Office Agency, 2008

4.3 In terms of floorspace, in 2008 there was in total around 491,000 sq m of retail and business floorspace in Hertford and Ware, with factory and warehouse space accounting for 45% and 20% respectively in 2008. Office floorspace accounted for 18.5% of floorspace, which is higher than share accounted for by retail floorspace of 14%. The GSK operations in Ware are likely to account for a high proportion of overall floorspace.

4.4 The average size of properties varies across the different use classes, with retail and office units tending to be the smallest with 150 sq m and 250 sq m on average respectively, compared to an average of 825 sq m for factory units.

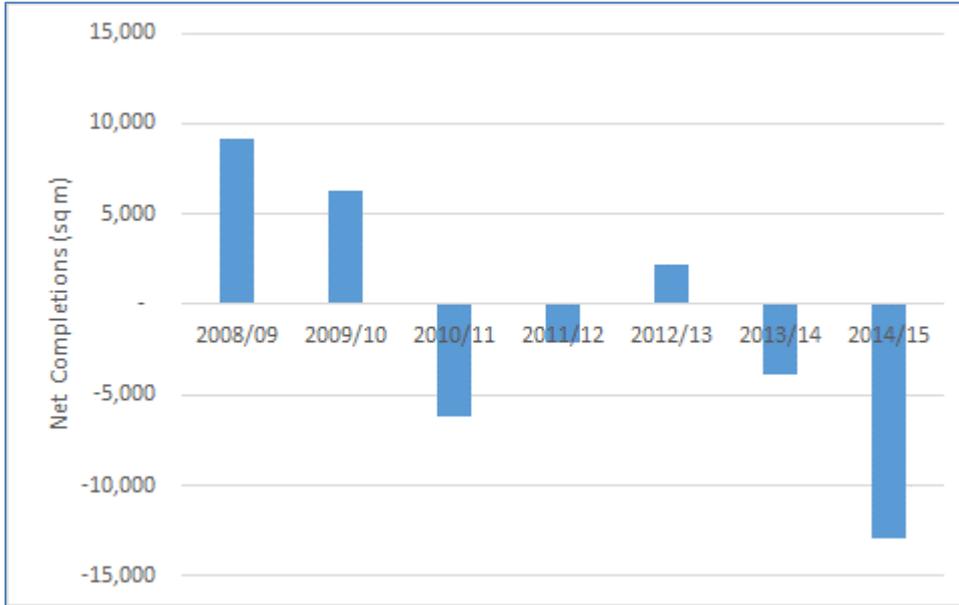
Annual Change in the Stock of Business Premises 2008-2015

- 4.5 In order to gauge the change in stock of business premises since 2008, annual monitoring data has been obtained from Hertfordshire County Council for Hertford and Ware. Since 2008, there has been a total net loss in business class floorspace (office, industrial and warehousing space, excluding retail) across Hertford and Ware. WEC estimate the stock of business premises floorspace has fallen by around 7,500 sq m, or 2% of the total stock as measured in 2008⁶.
- 4.6 Whilst this may not seem like a significant amount, the level of net loss is masked by one or two substantial gains in floorspace associated with the GSK site and the redevelopment of an area of Mead Lane Industrial Estate which occurred in 2008/09 and 2009/10 respectively. Together, these two developments accounted for a gain in 25,000 sq m of floorspace, without which the overall net losses in B use class floorspace across Hertford and Ware would be substantially greater.
- 4.7 On average, there has been an annual loss of just over 1,000 sq m pa of business class floorspace. Losses have occurred across all B use classes, with the most significant losses being as follows:
- 2009/10 – Leaside Depot and coachworks, Widbury Hill demolition and change of use from warehousing (-3,348 sq m B8) to 76 dwellings and open space (Ware)
 - 2010/11 – McMullen Brewery Site, Hartham, (Hertford) demolition and change of use to Supermarket (-7,000 sq m B8)
 - 2013/14 – Bentley House, Pegs Lane, (Hertford) change of use from B1 (-3,822 sq m B1) to Care Home (C2)
 - 2014/15 – Cintel site, Watton Road, (Ware) redevelopment of site to include Asda food store and 13 dwellings (-3,297 sq m B1a), (-3,635 B2 floorspace), (-5,267 B8 floorspace).
- 4.8 Figures 16 and 17 summarise the pattern of change in the stock of employment floorspace in Hertford and Ware over the period 2008-2015. The key issue raised by these statistics is that, as shown in Figure 16, there has been a significant net loss of employment floorspace over the 5 years 2010/11 to 2014/15, with a very substantial net loss of employment floorspace in 2014/15.
- 4.9 It seems plausible that there may have been further losses of employment floorspace in the year 2015/16, and that this trend may continue. Recent losses of office floorspace have been aided by the introduction of permitted development rights allowing change of use from offices to residential without the need for planning permission. These rights were introduced as a temporary measure in 2013 and were due to lapse in May 2016.
- 4.10 However, the Government has now made the permitted development rights for office to residential conversions permanent. The Government is also extending permitted development rights to allow

⁶ It should be noted that the geographical area covered by the annual monitoring data and that covered by data collected from the Valuation Office Agency may not match precisely, so caution should be applied in simply deducting or adding the monitoring data to the 2008 VOA data to arrive at the current stock of business floorspace.

conversion of B1c light industrial premises of up to 500 sq m to residential use. This right will come into effect from October 2017. The Government is still considering introducing permitted development rights to allow offices to be demolished and sites used for residential development.

Figure 16: Net Completions of Total B Use Class floorspace, 2008-2015, Hertford and Ware (sq m)



Source: Hertfordshire CC Annual Monitoring Data

Figure 17: Net Completions of B Use Class floorspace, 2008-2015, Hertford and Ware (sq m)

	B1	B1a	B1b	B1c	Total B1	B2	B8	Mixed B	Total B use class
2008/09	0	-2,098	0	0	-2,098	-546	199	11,589	9,144
2009/10	12,754	-852	0	0	11,902	-767	-4,794	0	6,341
2010/11	-1,122	-779	0	0	-1,901	-6,937	1,611	988	-6,239
2011/12	-419	-612	285	0	-746	0	-1,365	0	-2,111
2012/13	182	1,135	1,140	-952	1,505	135	561	0	2,201
2013/14	-150	-3,577	40	-297	-3,984	0	128	0	-3,856
2014/15	0	-3,804	0	376	-3,428	-3,730	-5,757	0	-12,915
Annual Average	1,606	-1,512	209	-125	179	-1,692	-1,345	1,797	-1,062

Source: Hertfordshire CC Annual Monitoring Data

4.11 Given the substantial value differential between residential land and land for employment use, particularly in areas of high housing demand and prices such as Hertford and Ware, there is strong incentive for landowners and owners of commercial property to secure residential consents, especially where the returns from employment use are low; and when sites are well located in relation to town centres and residential amenities. It is also very much harder for EHDC to make the case for retention of employment land if the Council is unable to demonstrate that it has a 5 year housing land supply.

Hertford and Ware Market Context

- 4.12 As noted in Section 3 the towns of Hertford and Ware are located just north of the A414 and either side of the A10. Whilst both Hertford and Ware are reasonably well connected in terms of road accessibility, they are considered secondary locations compared to those towns in the surrounding areas that benefit from more direct motorway access, such as Welwyn Hatfield, Stevenage, Bishop's Stortford and Harlow.
- 4.13 Similarly while both Hertford and Ware have frequent rail services into central London, the larger towns of Welwyn Hatfield, Stevenage, Bishop's Stortford and Harlow generally have faster services. This is an important consideration in terms of the location particularly of professional and financial service businesses which may require staff to make frequent journeys to London. The high frequency of services on both the East Coast Mainline and the Stansted Express/East Anglia Mainline also gives Welwyn Hatfield, Stevenage, Harlow and Bishop's Stortford – Stansted an advantage over Hertford and Ware.
- 4.14 The towns of Welwyn Hatfield, Stevenage, Bishop's Stortford and Harlow are therefore likely to compete with Hertford and Ware for business occupiers. In particular businesses looking for distribution and warehousing facilities are likely to want to locate where access to the motorway and trunk road network is best. Similarly office occupiers are likely to want to be centrally located within a labour market catchment area, and may be attracted to locations with the fastest and most frequent rail links to London. Sites in Broxbourne and along the M25 will also compete for business occupiers with Hertford and Ware.

The Office Market

- 4.15 The office market in Hertford and Ware is dominated by small, generally local occupiers. Average office rents over the last year have been £127 per sq m compared to a five year average of £140 per sq m. Figure 18 provides a summary of the key office market statistics for Hertford and Ware and the surrounding areas.
- 4.16 Office rents in Hertford and Ware are generally the lowest of the comparator areas with the exception of Harlow, and substantially below average rents achieved in Welwyn Hatfield (£194 per sq m) and Bishops Stortford (£182 per sq m). Both of these locations benefit from close proximity to the strategic road network, and superior rail services when compared with Hertford and Ware. Both Welwyn Hatfield and Bishops Stortford have a higher proportion of modern office stock than is to be found in Hertford and Ware.

Figure 18: Summary Office Market Statistics, April 2015

	Rent		Vacant floorspace		Vacancy Rate	12 month absorption	
	per sq ft	per sq m	sq ft	sq m		sq ft	sq m
Hertford and Ware	£ 11.84	£ 127.44	15,565	1,446	1.90%	12,629	1,173
Welwyn Hatfield	£ 18.00	£ 193.75	189,886	17,641	6.10%	273,375	25,397
Stevange	£ 13.85	£ 149.08	85,377	7,932	4.00%	53,168	4,939
Bishops Stortford	£ 16.91	£ 182.02	84,349	7,836	8.20%	43,320	4,025
Harlow	£ 11.49	£ 123.68	114,766	10,662	7.60%	105	10
Broxbourne	£ 16.25	£ 174.91	34,361	3,192	3.90%	4,748	441

Source: Costar/Focus

- 4.17 However, Hertford and Ware has the lowest office vacancy rates (1.9%) when compared to the benchmark authorities. In April 2016 Hertford and Ware is reported as having only around 1,500 sq m of vacant office floorspace. The very limited availability of office floorspace will in itself be a barrier to attracting new businesses since it means there is little choice.
- 4.18 Office vacancy and availability rates in Hertford and Ware have, on the whole, been on a downward trend over the last few years (see Figure 19). It is probable that the very low vacancy rate is the result not of significant demand for offices, but as discussed above and as shown in Figure 17 the substantial loss of office floorspace in 2014/15 (probably continued into 2015/16) probably associated with the conversion of office floorspace to residential use under permitted development rights.

Figure 19: Hertford and Ware Office Availability and Vacancy Rate



Source: Costar/Focus, April 2016

- 4.19 Other than the offices occupied by single occupiers such Hertfordshire County Council, GSK and EHDC, there is a very modest stock of office floorspace in Hertford and Ware. The only development in the two towns which approximates to a business park letting to multiple tenants is the Foxholes Business Park, built in the 1990s. The Business Park is located in a prominent position on the edge of Hertford with direct access onto the A414. However even this development has B1a floorspace mixed with B1c, B8 and Sui Generis uses.

- 4.20 There is also modern office accommodation to be found on mixed B1-B2-B8 industrial estates, notably in the Mead Lane Area (Hertford), at Crane Mead (Ware) and Marsh Lane (Ware). But these areas have constrained access and little prominence, and the estates as a whole are a mix of buildings in different uses and of differing quality. Thus they cannot be defined as business parks. The stock of office space in Hertford and Ware is therefore limited and certainly not comparable in terms of quality and location to areas such as Bishop's Stortford.
- 4.21 Net absorption figures over the last 12 months indicate that Welwyn Hatfield, Stevenage and Bishop's Stortford – Stansted have fared better than other comparator area areas (Harlow, Broxbourne and Hertford & Ware) with Hertford and Ware only achieving a net absorption figure of 1,170 sq m compared to 25,400 sq m in Welwyn Hatfield. This is an indication both of the relative demand for space in different locations and the availability of attractive accommodation.
- 4.22 It might be argued that the net absorption figures also reflect the lack of supply in Hertford & Ware. There is certainly a shortage of office space in Hertford & Ware, but this lack of supply may in turn reflect the perceived viability of new development in Hertford and Ware. If prevailing rents are low (as they are in Hertford & Ware) and the perceived demand for new property weak, the development sector will not develop new office floorspace on a speculative basis.
- 4.23 Where the demand for a particular form of floorspace, in this case office floorspace, is relatively thin, there can be a catch 22 situation. There is no evidence of demand for office floorspace so developers are deterred from building; but because there is no supply, those who would consider or want to be located in a particular town go elsewhere because of the availability of accommodation.
- 4.24 On the other hand the absence of supply may reflect the fact that if a residential consent can be secured for residential development this will very often yield higher returns for developers, so land is not brought forward for B1 development.

The Market for Industrial and Warehousing Floorspace

- 4.25 In terms of the market for industrial floorspace (B1c, B2 and B8), Hertford & Ware benefits as a location to some extent from its position between the A1(M) and M11, as well as its position on the A10 dual carriageway. As a result the market for industrial floorspace in the two towns is more substantive than the office market.
- 4.26 However, the towns' employment and industrial sites are largely served by minor road networks and cannot accommodate large scale B2 and B8 occupiers. This means that there is no substantive scope to attract those businesses looking to establish regional or national scale operations, which are located in some of the neighbouring towns close to the motorways.
- 4.27 In addition, many of the employment sites are situated in close proximity to, or even nestled within, residential areas, which restricts their suitability for B2 uses or B8 uses of any scale. These types of occupiers are more likely to seek more direct access to the strategic road networks as well as sites in large scale distribution parks that offer scale and flexibility.

4.28 Industrial rents in Hertford & Ware have averaged £80.50 per sq m in the last 12 months to April 2016, which is higher than those achieved in Welwyn Hatfield and Harlow but below those in Bishop’s Stortford (£90.30) and Stevenage (£82.70) (see Figure 20). The industrial vacancy rate in Hertford and Ware is low at 1% over the last 12 months with around 2,200 sq m of vacant floorspace, which indicates a very tight market for industrial floorspace (see Figure 21). In effect this implies that there is no supply to meet any new requirement or any need for a business to relocate, be that to consolidate, expand, or a need to move to more modern accommodation.

4.29 There is a reasonable amount of vacant industrial floorspace in the surrounding local authorities, with just under 100,000 sq m in total, over half of which is located in Harlow. With the exception of Bishop’s Stortford, Hertford and Ware and the surrounding local authorities have suffered negative net absorption figures over the last year (which means rising levels of vacancies), with Harlow faring particularly poorly with a reduction in occupied floorspace of almost 10,000 sq m. All areas appear to have suffered in the last year in comparison to their five year average which has seen much more positive absorption figures.

Figure 20: Industrial Property Market Summary Statistics

	Rent		Vacant floorspace		Vacancy Rate	12 month absorption	
	per sq ft	per sq m	sq ft	sq m		sq ft	sq m
Hertford and Ware	£ 7.48	£ 80.51	23,912	2,221	1%	- 15,998	- 1,486
Welwyn Hatfield	£ 6.68	£ 71.90	173,455	16,114	2.40%	- 58,322	- 5,418
Stevange	£ 7.68	£ 82.67	169,145	15,714	3.80%	- 9,023	- 838
Bishops Stortford	£ 8.39	£ 90.31	99,232	9,219	3.40%	48,511	4,507
Harlow	£ 7.11	£ 76.53	545,520	50,680	7.80%	- 106,412	- 9,886
Broxbourne	£ 7.60	£ 81.81	63,773	5,925	1.50%	- 34,646	- 3,219

Source: Costar/Focus

Figure 21: Hertford and Ware Industrial Property Availability and Vacancy Rate



Source: Costar/Focus, April 2016

4.30 Appendix 4 contains a full set of charts and tables on the business space market for Hertford-Ware, Welwyn Hatfield, Stevenage, Bishop’s Stortford-Stansted, Harlow and Broxbourne market areas.

Conclusions

- 4.31 The available evidence would indicate that the supply of both offices and industrial space in Hertford and Ware is now very tight in that vacancy rates are so low, there would be no readily identifiable space for a business with a significant requirement to move into. This situation seems to have come about because of substantial loss of employment floorspace over the years, but particularly in 2014/15 when there was a net loss of 12,900 sq m (139,000 sq ft).
- 4.32 It seems highly probable in the light of local knowledge that there will have been a further net loss of employment floorspace in Hertford and Ware in the year 2015/16 and this analysis should be updated as soon as data for 2015/16 is available from Hertfordshire County Council. A key factor in the loss of employment land is the value of land within Hertford and Ware for residential development, and the use of permitted development rights.
- 4.33 The market for both office and industrial space in Hertford and Ware is inevitably relatively small compared to that to be found in the M11 and the A1(M) corridors. There is therefore less evidence of demand and this therefore deters speculative building. New provision is therefore more likely to be delivered on a design and build basis for particular occupiers; if speculative development was to be undertaken it is likely to be small scale and by small to medium sized developers.
- 4.34 The absence of good quality stock to rent will act as a deterrent to the attraction of occupiers who would consider Hertford and Ware as a business location, and limits the market for employment floorspace essentially to local businesses or those that have a very specific requirement to be in Hertford and Ware; or those willing to commission the building of their own bespoke premises.

5. Review of Existing Employment Sites in Hertford and Ware

5.1 An important element of this study has been to appraise the general, multi-occupier employment sites in Hertford and Ware to establish whether they are fit for purpose; and if they need to be improved, what actions should be taken. This appraisal updates the last detailed appraisal of these sites which was undertaken by EHDC in 2013 with detailed schedules set out in the East Herts Employment Land Review Update 2013.

5.2 This update has been informed by site visits (undertaken in April 2016), visual inspections of the exterior and environs of the B1, B2, B8 and Sui Generis properties on the business parks and industrial estates in Hertford and Ware. The assessment has also entailed discussions with local commercial property agents and a review of the previous assessments of the sites (in 2013 and 2008) to assess the pattern of change over the past 8 years.

A Classification of Hertford and Ware's Multi-Occupier Employment Sites

5.3 The business parks and industrial estates examined vary considerably in size, and in terms of quality and cost, and in the mix of occupiers. To allow a better understanding of the nature of the 'portfolio' of employment sites, the sites assessed have been grouped into 4 categories as follows:

- **A. Sites with a Significant Proportion of B1 uses**, with a high proportion (for Hertford and Ware) of office space, but potentially suited to B1b R&D use (though there is little of such development it is a growing use class – see Figure 17); and B1c light industrial use.
- **B. Reasonably Modern Large multi-occupier industrial estates**, which have the full range of B1-B2-B8 occupiers, with potential for further development. This may include a significant elements of office as well as multi-purpose units, and B1c, B2, B8 and Sui Generis uses
- **C. Older, Large multi-occupier estates**, characterised by B2-B8 occupiers with typically older properties and cheaper rents, and would not be deemed to be a location where any office occupier would consider locating unless the site is redeveloped.
- **D. Small, multi-occupier industrial estates** typically comprising smaller units, and a wide variety of occupiers; most of these estates have limited scope for expansion; properties may vary from the poor quality to modern units on the same estate.

5.4 Figure 22 shows which category each of the employment sites included in the study brief in Hertford and Ware has been placed in. The judgement of whether certain estates fall into Category B or C is in some cases hard, because there is a mix of modern and poor quality accommodation on those sites; these 'hard to categorise estates' are marked with an * .

5.5 A brief description and summary appraisal of the contribution that each site makes to the supply of employment premises and land is given below, with an assessment being made for sites under each category. The exception to this is that all the site assessments for the five different parts of the Mead Lane Industrial Area are dealt with together to allow an overall assessment of the Mead Lane area in terms of employment land supply.

5.6 Full site appraisals and photographs of the different business parks and industrial estates are contained in Appendix 5.

Figure 22: Employment Sites in Hertford and Ware by Category

Sites in italics are part of the extensive Mead Lane Industrial Area in Hertford

Category A	Category B	Category C	Category D
Foxholes Business Park (H) Pegs Lane Campus (H)	Hartham Lane (H) Wareham’s Lane* (H) Broadmeads* (W) Crane Mead (W) Marsh Lane (W)	Caxton Hill & Hertford Industrial Estate (H)	Gentleman’s Fields (W) Windsor Industrial Estate (W) Mimram Road (H) Taylor Trading Estate (H) Star Street/Widbury Hill
	<i>Merchant Drive/ Fountains Drive (H) Mead Lane Business Centre (H)</i>	<i>Marshgate Drive (H) Mead Lane/ Lockhouse Industrial Estate (H) Centrus, Mead Lane (H) Conbar/Expo/Orland. Chelsing House,* Mead Lane</i>	<i>Dicker Mill (H)</i>

Category A: Sites with a Significant Proportion of B1 class Uses

Foxholes Business Park, John Tate Road, Hertford

5.7 Foxholes Business Park is located immediately off the A414 on the Foxholes roundabout to the south east of Hertford town centre. It is a reasonably modern (1990s) good quality estate, which is well occupied and well maintained. It comprises several different sections including; The Chase, a two storey office development; two storey B1a units on Watermark Way; the Harforde Court light industrial/office units, together with businesses located along John Tate Road including the Fishpools Distribution Centre. The Mercedes Benz garage fronts the estate.

5.8 The location of the estate is such that it is highly visible and has excellent access to the trunk road network, though there can be congestion at peak hours along the A414 in central Hertford. The estate has good parking facilities and good circulation, but there is extensive on-street parking on the internal roads which can narrow the access roads effectively to single carriage width. The number of vacant units is fairly low, but a number of units in The Chase are vacant and appear to have been so since the ELR review in 2013.

Pegs Lane, Hertford

5.9 The Pegs Lane employment area is identified in the East Herts Draft District Plan Preferred Options, covering an extensive area to the south of the A414 and to the north and west of Pegs Lane (the B158). In many respects the area can be regarded as a public sector campus, since Hertfordshire County Hall, the offices of EHDC and Hertford Police Station are all located in this area. To the north

east of the site, there is a major Ford car dealership, Gates of Hertford, which is accessed directly from the A414.

- 5.10 However, the employment focus of the area has been diluted by the conversion of Bentley House a 5-storey mid 1980's office block to care home; and the demolition of Sovereign House, a five storey 1960s office block. The Sovereign House site is to be redeveloped for housing. A former Public House is still standing, but it is anticipated that in due course this will probably be developed for housing.
- 5.11 In the light of the recent and anticipated development of much the site for new homes, the coherence of the whole of the District Plan Preferred Options proposed employment designation has been lost, and if the proposed site allocation is to be retained it should be redrawn. However retention of land which remains in employment use is important since Hertford and Ware has very little alternative provision of B1a office accommodation.
- 5.12 Given the extent of public sector ownerships in the Pegs Lane area, and the considerable loss of small office accommodation in Hertford in recent years, consideration should be given to whether the County and District Councils can identify means of using land or buildings in their ownership within this area to re-provision office workspace, probably with a focus on providing a business centre to cater for a range of smaller businesses requiring office space.

Category B. Reasonably Modern Large Multi-Occupier Industrial Estates

Hartham Lane, Hertford

- 5.13 The Hartham Lane employment area is situated north of Hertford town centre in close proximity to Sainsbury's superstore, Hartham Common and Hartham Leisure Centre. It incorporates McMullens Brewery, part of which was redeveloped to accommodate Sainsbury's supermarket. Whilst the industrial estate benefits from a location in proximity to local amenity and public transport, it is served by a relatively minor road network which detracts from the overall attractiveness of the site.
- 5.14 The site itself has a mix of B1c and B1a units as well as some open storage areas and builders yards. Ekins & Co Builders occupy a reasonably large portion of the site whilst the remainder is made up of smaller units of varying quality. Planning permission has recently been given to demolish an existing light industrial building and redevelop new light industrial premises with a net gain in floorspace of around 500 sqm. At the time of the site visit demolition had been completed and it appeared as if works were to start in the near future. An area of the site next to Ekins & Co has recently been cleared and works look as if they will be starting imminently. Whilst parking seems to be adequate the site would benefit from an improved and more efficient layout together with better signage.

Wareham's Lane, Hertford

- 5.15 Wareham's Lane is situated on the south side of the A414 relatively close to Hertford Town Centre. It can only be accessed from the west-bound carriageway of the A414, and therefore those approaching from the west who work or have business at Wareham's Lane have to drive to the County Hall roundabout and return via the westbound A414. At peak times this will add to journey times due to congestion.
- 5.16 The industrial estate has high levels of occupancy and activity, with a wide mix of activities including offices (including the Consumer Association's 'Which?' business) and laboratory space; car sales, open storage and yard areas. The overall appearance of the estate is not particularly good given the wide mix of uses including open storage, car sales parking areas, and extensive on street parking. However, high levels of occupancy indicate that the estate serves a real business need for a wide range of different businesses.

Broadmeads Estate, Ware

- 5.17 The Broadmead Estate is located just on the edge of Ware town centre close to Ware Station. In terms of location the site has the advantage of being close to town centre services and amenities. Road access is not good, being via minor roads with limited width. The site is currently occupied by Farecla, a world-class manufacturer and supplier of surface finishing solutions. The site is not only located on the edge of the town centre but also located in close proximity to residential uses.
- 5.18 Were Farecla to relocate, Wessex Economics believes the site would still be a valuable employment site given its location despite proximity to residential properties. The chance of finding a single occupier suited to the site could be limited. In these circumstances it would be appropriate to seek to redevelop the site for a mix of small scale B1c and B1a units. If the viability of such development was an issue an element of residential development could be permitted as a form of enabling development.

Crane Mead and Crane Mead Business Park, Ware

- 5.19 Crane Mead is situated just off the A1170 north of the Ware – Liverpool St railway line and just east of Ware town centre. It comprises Swains Mills and Mill Studios to the fore of the site, both of which accommodate a range of small B1 businesses; and, to the rear, the Crane Mead Business Park consisting of modern, good quality, standardised B1c/B8 units.
- 5.20 The estate is well occupied with limited vacancies and Crane Mead Business Park in particular is good quality with adequate levels of parking and an efficient layout. However, the site as a whole lacks visibility and prominence. There is no signage from the A1170. Access is via relatively minor narrow roads; and the route into the site entails driving through a residential use with nothing to indicate there is a business park/industrial estate at the end of the road.

Marsh Lane, Ware

- 5.25 Marsh Lane is in a similar location to Crane Mead, situated slightly further south off the A1170 on the other side of the Ware – Liverpool St railway line. It is one of Hertford-Ware's larger industrial estates and comprises a mix of old industrial premises, open yards and storage areas and more modern office development. Premier Inn have recently completed a new hotel development on the principal access road to the site with high visibility from the A1170. Signage to the estate should be improved.
- 5.22 The site has a relatively low vacancy rate although it appears as if some of the older and larger industrial units are under-utilised and might benefit from refurbishment and sub-division. On street spill-over parking detracts from the overall attractiveness of the estate and causes some internal congestion. On the whole it is a well-functioning and popular estate but would benefit from renewal and investment as the opportunities arise.

Category C: Older, Large Multi-Occupier Estates

Caxton Hill/Hertford Industrial Estate

- 5.23 The Caxton Hill/Hertford Industrial Estate is situated to the south east of Hertford town centre with access via the Ware Road (A119) and Caxton Hill road. It comprises two main sections: the northern part, which is the first reached when approaching via Caxton Hill. This is made up of the Stephen Austin (print works) and Fluorocarbon buildings; both of these businesses are sizeable employers. There are also a number of much smaller industrial units along Caxton Hill and Extension Road.
- 5.24 Situated to the south, also accessed by Caxton Hill is the Hertford Industrial Estate which comprises single storey warehouse and light industrial units which are old, of low quality and poorly maintained. There are high vacancy rates within the Hertford Industrial Estate, particularly to the rear of the site where a number of larger units are vacant. The owners of the Industrial Estate are known to be considering submitting a planning application for residential use, so units may not have been marketed as they fall empty or only let on short term leases.
- 5.25 Overall, the condition of the estate is poor, with a general lack of amenity, inadequate parking and circulation and poorly maintained units and external areas and poor signage. The estate suffers from a lack of visibility and prominence together with poor access via Ware Road/Caxton Hill. The level of vacancy on the site, together with the generally poor condition of the units, suggests the estate is in need of modernisation and refurbishment, although the larger obstacles of access and visibility would need to be tackled in order to make the estate truly attractive.

Category D: Small, Multi-Occupier Industrial Estates

Gentleman's Fields/Ermine Point

- 5.26 The Gentlemen's Field development is situated on Westmill Road just off the A10 to the north east of Ware town centre. It benefits from good access to the strategic road network (A10) but is some distance from public transport and amenity provision. It comprises a mix of small warehouse and office units, most of which are of average to good quality. Vacancy levels are low (only one vacant unit) and the estate appears very active and busy. However, on-street parking detracts from the overall attractiveness of the estate and indicates that overall parking provision may be inadequate. Overall, the site is a good quality and well located employment site with good market perception.

Windsor Industrial Estate, Ware

- 5.27 The Windsor Industrial Estate is located on the A119 south of Ware urban area just to the east of the A10 over-bridge. It is a small estate with average quality units, good visibility from the road network and with adequate parking. It has been occupied by the same five occupiers for several years and is clearly functional in its current use.

Mimram Road, Hertford

- 5.28 The Mimram Road Industrial estate is situated just off the A414 on the approach to Hertford town centre. Whilst it benefits from location on the strategic highway network, it is only possible to access the estate from the westbound carriageway of the A414. If travelling east along the A414, one has to continue for some way past the estate before making a full U-turn at the roundabout and travelling back the other way as it is not possible to execute a right turn into the estate from the east-bound A414. The estate also lacks signage and visibility despite its location off the A414.
- 5.29 The estate comprises a mix of B1c, B2, B8 and some B1a uses together with sui generis uses including a car wash and MOT centre. The units themselves are fairly old with a lack of up to date signage to denote occupiers and with a number of properties in a poor state of repair. Despite no advertised vacancies, several units appear to be under-utilised or empty and could benefit from refurbishment and sub-division to make them more appealing to smaller occupiers.
- 5.30 The estate is generally active and busy but suffers from inadequate parking which has led to on-street parking and internal congestion and poor circulation. On the whole the site functions well as an employment area but would benefit from investment and improvement.

Taylor Trading Estate, Hertford

- 5.31 The Taylor Trading Estate fronts the A119 Ware Road just to the west of the A10 over-bridge. Although it has road frontage and good visibility it is situated on the edge of a residential area and is not particularly close to public transport and retail amenities. The area of the estate fronting the

road is occupied by Lloyd Motor Spares (formerly SAM Centre) with the remainder of the front part of the site having been cleared and boarded up.

- 5.32 At the rear are a series of low quality, light industrial units occupied by low cost local occupiers and including a car wash and MOT centre and car repairs. One unit appeared (May 2016) to be vacant but otherwise the remaining units are occupied. Although reasonably well occupied, the site is low quality and in need of investment or refurbishment to make it more attractive. Depending on the eventual use of the vacant part of the site it may well become more of a mixed employment and/or residential area rather than a B use class employment area.

Star Street, Widbury Hill

- 5.33 The Star Street employment site is situated on the western edge of Ware town centre and used to be functionally part of the larger Widbury Hill employment site. The main Widbury Hill employment site has been granted planning permission for residential development and employment floorspace. A further planning application to change the employment use to a Care Home was recently approved by EHDC.
- 5.34 The Star Street site consists of four single storey units off Star Street (the B1004), three of which are occupied. The fourth unit has recently become vacant but there is no current indication that the unit is being actively marketed. The site is bound to the south and east by the River Lea and backs onto residential properties with a pub on Star St itself on the western side of the road into estate.
- 5.35 The site is visible and close to the town centre of Ware making it attractive in terms of proximity to transport and amenity. Star Street (B1004) can be busy at peak traffic times. Parking on site is adequate although slightly compromised by the Star Street garage which spills over into other areas of the site. Overall the site is of average quality but occupied and functioning well as an employment site.

The Mead Lane Area, Hertford

- 5.36 The Mead Lane area of Hertford is a major employment area in close proximity to the town centre and train station. It accommodates a wide range of B1a, B1c, B2 and B8 occupiers of varying sizes. The different areas which make up the Mead Lane area are named in Figure 27. Separate site appraisals are undertaken for each of these separate areas; these are presented in Appendix 6. This section summarises the key features of the area as a whole, including Dicker Mill.
- 5.37 Mead Lane runs parallel with the rail line from Hertford East station and the river Lee and is comprised of a series of industrial estates and business parks located to the south of the river and to the north of the railway line. The Dicker Mill industrial area is located north of the river, but can only be accessed through the Mead Lane area, so it is functionally part of the Mead Lane estate

- 5.38 A key issue that affects the appeal of the Mead Lane area is that access can only be obtained to the area via Mill Road which is now a predominantly residential street of only standard width to the north of Hertford East station. The site is therefore not well connected into the strategic road network (the link being made at the Bluecoats roundabout (at the junction of the A414 and the A119 Ware Road).
- 5.39 Mead Lane itself is congested with on-street parking which necessitates single file traffic and means poor circulation for larger vehicles and HGVs. Development of additional flats off Mill Road will probably add to volume on-street parking unless parking restrictions are introduced, as well as adding to traffic flows particularly at peak times. Peak hour traffic flows will be somewhat mitigated by the fact that new homes are within reasonable walking distance of Hertford East railway station. If a high proportion of residents are rail commuters who walk to the station this will mitigate peak hour traffic flows.
- 5.40 The area varies considerably in terms of quality, occupancy levels and overall functionality as an employment area. Parts of the area are tired-looking and lack investment and maintenance, (for example the Lockhouse Industrial East). Such areas, however, serve a useful purpose in providing low cost space, which is increasingly being lost from other areas through redevelopment for residential use. The value of such areas is apparent in generally low vacancy levels. Other parts of the Mead Lane area are characterised by modern, well maintained business units. These include Merchant Drive and Centros.
- 5.41 On the whole, the area clearly functions reasonably well as a major local (as distinct from strategic) employment area, serving mostly local occupier needs. In order to make the area more attractive to higher value and or large scale occupiers as well as external investors, significant improvements to access would be needed; and these will be difficult and expensive to achieve. At present, despite its size, the estate cannot compete with sites better connected to the strategic road network in surrounding local authorities.
- 5.42 The entire Mead Lane area is the subject of the Mead Lane Urban Design Framework (UDF) published for consultation in 2011, though the UDF was not formally adopted as the basis for planning policy until 2014. The objectives of the Urban Design Framework are to regenerate the Mead Lane area by delivering a high quality public realm; improving connectivity and accessibility; whilst retaining as many of the employment uses as possible and promoting new employment opportunities as part of mixed use development.
- 5.43 Technically the Dicker Mill employment area is not part of the Mead Lane Industrial Area, since it is located on the north side of the River Lea Navigation. However functionally it is related to the Mead Lane Area since it is accessed solely via Mill Road which, as noted previously, is increasingly congested. In addition the bridge over the River Lea Navigation only permits one way access. The estate is, for the most part, comprised of poor quality old units that have not been maintained or refurbished in some time.

- 5.44 The estate has the benefit of being close to the town centre and relatively close to Hertford East train station; but parking is inadequate and circulation and turning on the estate is problematic with on street parking clogging up areas. In spite of these issues, the site is well occupied with limited vacancies and appears very active serving small, local occupier needs for B1a and B1c units and sui generis uses.

Overview and Summary

- 5.45 The current pattern of provision of employment floorspace provision in Hertford and Ware essentially provides for the needs of local business. None of the current employment sites in Hertford and Ware are likely to be seen as really competing at the sub-regional level for inward investors or growing businesses.
- 5.46 Given the location of Hertford-Ware between, not in, the M11, A1(M) and M25 corridors, it would be challenging for the two towns to compete for large occupiers with business parks and industrial estates in these areas, but it should be possible for Hertford-Ware to compete for medium and small occupiers looking for business space in south Hertfordshire, south west Essex area; but the current portfolio of sites and premises is not ideal if that is what EHDC wishes to do.
- 5.47 With respect to the portfolio of B1a office sites and premises in Hertford and Ware, the choice is largely restricted to space at the Foxholes Business Park (a mixed B1a, B1c, B8 and Sui Generis development), which suffers at peak hours from congestion on the A414 and on-site parking issues; or existing sites; and premises on the better multi-purpose industrial estates (Mead Lane, Crane Mead, and Marsh Lane). Mead Lane and Crane Mead are handicapped by access issues and lack of visibility.
- 5.48 There would seem to be a potential need to plan for provision of good quality B1 floorspace in an attractive, well accessed strategic location somewhere in the southern part of East Hertfordshire, which implies a location on the A414 or A10, or at the intersection of these two trunk roads. Previous work for EHDC has identified the strategic role of Bishop's Stortford as a business location in the north of the District.
- 5.49 There are also anecdotal indications that there has been a significant loss of small office space in the two towns. This may indicate a need to provide both shared business space in the form of a business centre (or centres) and move-on accommodation. Many of such activities could ideally be located close to town centres (and preferably the stations); and would be well suited to integration with mixed use developments. However, some occupiers will prefer locations with direct access to the trunk road network.
- 5.50 The Hertford-Ware area has a significant stock of poor quality industrial property. The smaller industrial estates/areas with such property appear to be well occupied by businesses which are happy to accept low quality in return for low rent and rates bills. The challenge for EHDC arises where there is a significant concentration of poor quality space in a poor location for B2-B8 uses.

The principal current example of such space is the Hertford Industrial Estate, which has very poor condition properties and poor access.

- 5.51 Wessex Economics conclude that most of the current portfolio of employment sites in Hertford and Ware perform a useful function at present, but there is likely to be a need to progressively refresh the sites and to make new allocations of employment land as older, less well located sites are lost to other uses or developed for mixed uses.

6. Strengths and Weaknesses Analysis of Hertford and Ware

6.1 It is a useful step in developing an economic development strategy for Hertford and Ware, and linked to that an assessment of the need for employment land and floorspace, to identify the strengths, weaknesses, opportunities and threats of Hertford-Ware. Broadly, a strategy can be developed as follows:

- Recognising strengths and using these to market Hertford-Ware to the sort of businesses that will particularly value those strengths.
- Identifying weaknesses, particularly those that prevent Hertford-Ware from achieving their potential and identifying actions to address those weaknesses or minimise their adverse impact.
- In terms of the pattern of change, identifying opportunities, future trends or events that Hertford-Ware is well placed to benefit from or needs to position itself to take advantage of.
- Analysing threats. There may be future trends that will work to the disadvantage of Hertford-Ware, but opportunities to counter or eliminate such threats.

6.2 In terms of economic development, it is useful to assess the strengths and weaknesses of a particular place against a number of criteria that determine the economic success of a town, county, or region. These are as follows:

- **Accessibility:** accessibility can be assessed by examining the ease and cost of travelling to key destinations such as major employment centres, airports, ports, etc; an analysis of the accessibility of Hertford-Ware is presented in Appendix 7.
- **Sector and cluster specialisms:** places which have concentrations of particular businesses often attract further investment; the car industry in Coventry and the bio-tech industry in Cambridge are examples (see the sector analysis in Section 3).
- **Existing employer base:** even where there are no sector specialisms, there may be scope for helping existing employers to expand, or action may be required to retain those same employers (see the employment analysis in Section 3)
- **Business environment:** at the local level, the business environment is closely associated with the quality, choice and cost of offices, factories and warehouses (see Section 4).
- **Connectivity:** while in urban areas broadband is nearly universal in the UK, day-to-day business experience indicates different levels of connectivity; this can influence where businesses locate.
- **Skills:** the ease and cost with which businesses can recruit the staff it needs will have a bearing on business growth and influence location decisions (see the skills analysis in Section 3).
- **Quality of life:** this is particularly significant when businesses are looking at location options, and is a factor of importance to key decision makers who may be looking to move home at the same time as relocating their business. Quality of life factors such as the cost and style of

housing available locally, the quality of education and the natural environment can influence the destination of mobile business investments.

- 6.3 Figure 23 summarises the key strengths and weaknesses of Hertford and Ware and their environs as assessed by Wessex Economics. Businesses are likely to regard the two towns as a single ‘location’ rather than two separate towns, so this strengths and weaknesses is undertaken for Hertford and Ware as a single urban area. While this study has entailed some consultation with local organisations, it is recommended that EHDC engages with local businesses and other partners to establish if this assessment accords with the perception of local businesses.
- 6.4 It is worth noting that in a number of cases the characteristics of Hertford and Ware can be expressed both as weaknesses and strengths. For example, GSK is a very significant, high value employer in Hertford and Ware, which is a significant positive, providing a source of well paid, secure, employment. GSK’s presence in the town might help to attract suppliers or other businesses to Hertford or Ware. However, the presence of a single large employer also means that Hertford and Ware would suffer significantly if GSK were to relocate perhaps in the wake of a corporate takeover or restructuring.

Figure 23: Hertford and Ware Strengths, Weaknesses, Opportunities and Threats

Strengths	Weaknesses
<p>Accessibility: fast, direct regular rail services to Liverpool St (c 50 mins), Moorgate (c42 mins) and Kings Cross (c40 mins with change at Finsbury Park).</p> <p>Dual carriage way access to/from A1(M) (via A414) and M25 (via A10)</p> <p>Hertford-Ware is better placed in terms of the national motorway network and in terms of rail connectivity to London than many towns of similar size in the greater South East. It is located in and has good access to a prosperous sub-region.</p> <p>Existing Employer Base: GSK is the single largest employer in Hertford and Ware and a high value, high skill, high pay employer; an anchor for the H&W economy.</p>	<p>Accessibility: Hatfield, Welwyn GC, Stevenage & Hitchin have faster and more regular rail services to Kings Cross. Bishop’s Stortford and Harlow have faster and more regular rail services to Liverpool St.</p> <p>Access routes to/from A1(M) and M25 congested at peak times. Route to the M11 only partly dual carriageway and then through urban area of Harlow. Neighbouring authorities – Welwyn Hatfield, Stevenage and Harlow all have the major routes running through their area; and are therefore more accessible than anywhere in East Herts other than Bishop’s Stortford.</p> <p>Other sub-regional towns (Welwyn-Hatfield, Stevenage, Bishops Stortford/Standed and Harlow have an advantage over Hertford Ware in terms of attracting mobile investment of firms which require high levels of road or rail connectivity.</p> <p>Existing Employer Base: no obvious major employers other than GSK which might provide the basis for attraction of a supplier base or related businesses to Hertford/Ware.</p>

<p>Sector and Cluster Specialisms: Pharmaceuticals – associated with GSK, which can be regarded as part of the London to Cambridge science/bio-tech corridor. In terms of Location Quotients H&W is highly specialised in public sector employment (2.3), followed by a specialism in manufacturing (strongly linked to GSK) and professional services.</p> <p>Business Environment: few identifiable strengths other than high quality R&D facilities associated with GSK.</p> <p>Connectivity: limited information available. The likelihood is that levels of broadband are those typical for urban locations, unless investment linked to GSK has brought about wider improvements. Businesses from surrounding villages might be drawn into H&W if there are poor services in villages and rural areas Requires further study.</p> <p>Skills: Hertford and Ware has a high proportion of residents with degree level qualifications (35.6%) higher than East Herts as a whole (33.5%) and Hertfordshire (32.1%). Local analysis of those working in H&W by skill level is not possible, but jobs at GSK are likely to be weighted to high skill jobs; and a significant proportion of jobs in the public sector will require graduate level staff.</p> <p>Quality of Life: Wessex Economics has not been able to assess quality of life comprehensively. Key criteria and the type, quality and cost of housing; the choice and standards attained in local schools; the appeal of town centres and surrounding countryside; crime rates etc. WEC would expect quality of life to be rated highly.</p>	<p>Sector and Cluster Specialisms: no particular evidence of significant related bio-tech businesses in Hertford and Ware, though there are emerging activities in Harlow, linked to the Enterprise Zone. Employment in public sector services is likely to continue to be affected by public sector spending constraints. The professional services sector may be constrained from growing by a shortage of good quality office space.</p> <p>Business Environment: No significant business parks. Most of the modern stock of office space is on mixed B1a, B1c, industrial estates; only one of these has good access to the strategic road network. There is a limited supply of good quality new stock and vacancy rates are very low (1-2%). A significant proportion of the stock is of poor quality and the main attraction is low rents. The overall stock of business space has been greatly reduced by recent loss of employment floorspace to residential use and there is a significant risk of further losses. There is little apparent interest in investment in new development. Many of the existing industrial estates require renewal/ improvement.</p> <p>Connectivity: limited information available. If connectivity is only average, this could work against the attraction of creative industries identified in the EDVAP. At best connectivity is likely to be acceptable for general use, and not a particular strength.</p> <p>Skills: Out-commuting from H&W to other parts of the sub-region and to London is significant, and given the skills profile of the H&W it is probable that a high proportion of the more skilled residents commute out of the two towns. Higher salaries associated with jobs in London might mean that local employers find it more difficult to recruit skilled staff – though this may be offset by avoiding the cost and stress of commuting.</p> <p>Quality of Life: Wessex Economics has not been able to assess quality of life comprehensively. WEC would expect the major quality of life disadvantages would be perceived as the high cost of housing and congestion.</p>
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7. Future Policy for Employment Land Provision in Hertford and Ware

7.1 This section draws upon the analysis presented in previous sections, to identify key issues for EHDC as it plans for employment in the District as a whole, and in particular as it develops its plans for provision of employment in the Hertford and Ware, and the closely linked issue of what this means for provision of employment land and premises for business use (use classes B1, B2 and B8).

7.2 The section is presented under the following headings:

- Strategic Planning for Business and Jobs
- Short Term Objectives for Employment Floorspace
- Strategy for Retention of Existing Employment Floorspace
- Medium Term Strategy for Re-provision of Employment Floorspace
- Indicative Long Term Strategy for Employment Floorspace

Strategic Planning for Business and Jobs

7.3 Local planning authorities have a statutory duty to plan to meet the needs of business in terms of provision of employment land and business floorspace. However it is worth spelling out the various reasons why it is deemed important to do this, since there are multiple reasons why it is appropriate to ensure a balance between housing and job growth within a local authority area. There are also other reasons for local authorities seeking to retain and grow the employment of an area that are not directly related to land use planning.

7.4 In summary the factors that need to be considered are:

- The desirability of ensuring that people do not have to travel long distances to work, from the point of view of individual workers, particularly low paid employees, and from a sustainable development perspective.
- The desirability of ensuring that residents and businesses can access goods and services without the need for lengthy journeys to access those goods and services, or extended delivery networks.
- The potential for adverse impacts if local businesses are required to relocate to a distant location in terms of disruption to their labour force; and potentially to their established customer base.
- The inter-relationship between the employment base of a town and the viability and vitality of the town centre retail and leisure offer. The expenditure of those working in a town, along with local residents, helps to support town centre businesses.
- A non-planning consideration is that, assuming the Government proceeds as announced with reforms to local government finance, from 2020 onwards EHDC will be reliant on income from business rates rather than central government grants.

- 7.5 These various reasons why EHDC should actively plan for retention and new provision of employment floorspace are discussed in more detail below.

Planning to Encourage Shorter and Sustainable Journeys to Work and to access Services

- 7.6 In 2011 an estimated it is estimated that 42% of the working residents of EHDC worked within the EHDC area. These are a mix of people who work for an employer and those who are self-employed, comprising those who travel to a place of work and those who work from home. Thus, around 58% of the working residents of EHDC work outside the District. Overall an estimated 42,000 working residents of EHDC (including 6,100 with no fixed place of work) travel out of the District to work, and 22,000 travel into the District, so there is net out-commuting from EHDC of 20,000 people.
- 7.7 While the choice of where people work and live is entirely up to them, it is important to EHDC to ensure that residents of the District have the opportunity to work in the local area. This is particularly important for low income groups where the cost of travelling to work in further afield locations may consume a disproportionate share of their earnings. The availability of jobs within an area is also important in helping encourage shorter journeys to work, which are more sustainable if people are travelling to work by car.
- 7.8 Another aspect of ensuring sustainable development is to ensure that, where possible, local people and businesses can access goods and services without the need for lengthy journeys to access those goods and services, or extended delivery networks. Of course, in a highly specialised economy such as the UK the amount of services and goods that can be accessed from local suppliers is modest, and the advent of on-line shopping has reduced reliance on local suppliers; but residents and small businesses often do source services and everyday requirements from local suppliers.

Ensuring Provision of a Wide Range of Premises for Local Employers

- 7.9 Local authorities also have a duty to plan for businesses and ensure that premises of an appropriate price and size are available to meet the needs of employers. This is particularly important to established local employers. Any business is a complex entity involving suppliers, workforce, and customers. Any form of relocation, which will mostly arise from a need to find premises better suited to the needs of the business, is potentially damaging to the business in terms of disruption.
- 7.10 Any business relocation that entails relocation to some relatively distant location is that much more complex, because it is likely to involve relocation of staff or recruitment of new staff. Most business relocation therefore involves relocation over a short distance. It can be debatable what is deemed to be a short distance; is that 2 miles or 20 miles? How critical it is to relocate over a short distance will depend on the business. But this requirement implies that it is important to ensure there is a good choice of different types of business properties available at different rents within local markets.
- 7.11 While the provision of business floorspace is a commercial activity in its own right, local authorities also have a duty to plan that businesses can find appropriate space to continue their business when they need to relocate, or in which they can set up a new venture or branch of an existing business.

While the market determines rents, local authority planning policies can impact the availability and cost of employment floorspace.

The Relationship between the Employment Base of a Town and Town Centres

- 7.12 A final planning consideration when considering the supply of employment (B1-B2-B8) floorspace in East Hertfordshire arises from the interaction of the working population (as distinct from the resident population), and local retail and leisure businesses which are concentrated in town centres. This relates to EHDC's objective of ensuring the viability and vitality of its town centres. In Hertford and Ware many of the current employment sites are relatively close to the town centres.
- 7.13 There is the *potential* that where there are concentrations of working people close to town centres, this may help to support the day-time economy of the town centres, with workers going into the respective town centres in their lunch hour or before/after work. However, on balance Wessex Economics would expect that Hertford and Ware town centres probably do not benefit greatly from spending by those who work in the two towns. Ware town centre probably benefits more because of the large number of people who work on the GSK Ware campus.
- 7.14 The reasons for this assessment are as follows:
- The town centres that benefit most in terms of retail expenditure from expenditure by workers are those which have a substantial stock of office accommodation in the town centre. There here has been widespread conversion of small offices to residential use which has resulted in a loss of working population. However there is still a substantial working population in the Pegs Lane campus (County Council, District Council, police station and school) which are likely to support the retail and service businesses in Hertford town centre. Ware town centre will derive some benefit from the proximity of the GSK campus where it is understood around 1,250 people work.
 - There are relatively few major employment sites in the two towns within a 500 metre distance of the main retail centres of Hertford and Ware, the exception being the GSK Campus in Ware. 500 metres is generally regarded as the maximum distance people would readily walk to access shops and other facilities. Parking restrictions may deter people who work outside the walkable zone from driving into the town centres.
 - Most of the sites that are within 500 metres of one of the two town centres, with the exception of the GSK campus, are industrial estates which have much lower employment densities than office business parks, and probably have a smaller proportion of high paid workers. Working culture has also changed over the years, with less emphasis on people taking 'lunch hours'; though this may be compensated by people doing food shopping where they work on their way home.
- 7.15 One of the implications of this assessment is that it may be that redevelopment of employment sites close to town centres, either for residential or for mixed uses, may contribute more to sustaining town centre retail and leisure provision than their retention for employment purposes. This is not to

suggest that employment sites should be released for residential use, because a much wider range of factors need to be considered in coming to this conclusion than simply the impact on town centres.

Local Authorities' Future Reliance on Business Rates for Funding Services

- 7.16 In developing its overall strategy for provision of employment land in the District, EHDC also needs to have regard to the implication of the proposals announced by the Chancellor of the Exchequer in October 2015 that by the year 2020 local authorities will be able to retain 100% of business rates levied in their area. This will be accompanied by a substantive move away from central government core grant funding of local authorities.
- 7.17 Assuming that the proposed changes are implemented, EHDC's future finances are directly linked to its success in retaining and building its base of businesses and other employers who occupy commercial premises. This introduces an additional consideration to the strategy for employment land provision, with clear benefits from successful retention and growth of the employer base, particularly in higher value added activities which require modern premises.
- 7.18 While this Study is focused on the provision of employment land for B1, B2 and B8 uses solely in Hertford and Ware, in practice the strategy for provision of employment land in the two towns needs to be informed by a District-wide strategy for employment land provision, which itself should be informed by EHDC's longer term financial plans. This report makes comments on the possible shape of employment land provision in East Herts as a whole in order to provide context for the recommendations made regarding employment land provision in Hertford and Ware.

Short Term Objectives for Employment Floorspace

- 7.19 The availability of employment land and premises in Hertford and Ware appears to be significantly constrained. As noted in section 4, there was a net loss of 12,915 sq m of employment floorspace in 2014/15 and it seems probable that when available the data for 2015/16 will show a further significant loss of employment floorspace and employment land for that year. There appears to be very limited property on the market across the whole spectrum of B class uses with vacancy rates down to 2% for office space and below 2.5% for industrial space.
- 7.20 The underlying cause of this dramatic decline in availability has been the redevelopment of employment sites for residential use. In the recent past the following employment sites have been, or are being, redeveloped for residential use.
- Bentley House, a 1980's 5 storey office block in the Pegs Lane area has been converted to a residential care home
 - Sovereign House in the Pegs Lane area has been demolished and consent granted for a new residential Care Home
 - Consent has been granted for development of new homes and a care home on the Widbury Hill site on the south eastern side of Ware along with a new B class development.
 - There has been considerable redevelopment within the Mead Lane area of new homes on former employment land.

- Conbar House on Mead Lane has been converted in part to 14 flats residential use, under permitted development rights.
 - It is understood that over the years many smaller offices in Hertford and Ware town centres have been converted to residential use.
- 7.21 In addition to the recent loss of these employment sites, a number of planning applications or applications for change of use under Permitted Development Rights have been submitted or are anticipated. These include:
- A further application has been made at Widbury Hill to replace the existing planning consent for a new B class development with a residential development including Starter Homes
 - The owners of the Caxton Hill/Hertford Industrial Estate have recently held a public exhibition on an emerging proposal for the redevelopment of Industrial Estate for residential use and a care home.
- 7.22 In the light of the significant reduction of employment floorspace over recent years, and the fact that there is very limited supply of available space, Wessex Economics would recommend that EHDC seek to prevent further loss of employment land in Hertford and Ware in the short to medium term. In the medium to longer term it may be more realistic to designate new sites that will better meet the future needs of business, but in the current position there is increasingly little choice for occupiers who wish to be located in Hertford and Ware.
- 7.23 It will be argued that some of the sites identified for retention are redundant in that the properties are in poor condition. The fact that properties are in poor condition will be the case in some circumstances, but that does not mean that there are no businesses interested in occupying those properties. A number of businesses have a business model that depends on low cost property (in terms both of rent and rates) and these provide useful service and jobs.
- 7.24 Such business may not provide an acceptable return for landlords, so it is not surprising that landlords will bring forward proposals for redevelopment. It is no surprise that for most sites in Hertford and Ware owners will bring forward sites for residential development given the substantial premium for residential development sites over employment sites, even allowing for an element of brownfield site remediation.
- 7.25 There is a particular issue with businesses such as small garages undertaking MOTs and car repairs and car wash businesses. These types of users occupy quite a significant amount of space on many employment sites, and are at risk of being displaced. Many such businesses have limited relocation options. They cannot afford the rents on modern properties and often are not considered suitable uses on the better industrial estates. Similarly, when former industrial areas, such as Mead Lane, are progressively becoming mixed use developments with significant provision of new homes, such uses conflict with residential amenity.
- 7.26 Much of the space formerly occupied by such businesses, particularly on smaller sites has been lost to residential use over the years. While such businesses are not considered 'good neighbours', they

provide employment opportunities for local people and important services to local residents. Specific consideration needs to be considered as to how to ensure that business space is made available for such businesses.

7.27 In summary, it is the loss of employment sites, *without any clear short-term means of re-provision*, which prevents a substantive challenge for EHDC as planning authority. The declining availability of employment sites will limit the scope for retaining existing businesses already located in Hertford and Ware, as and when their requirements for better or different types of premises; quite apart from the desirability of attracting new employers to Hertford and Ware to fulfil planning objectives, and building the number of business occupiers paying business rates.

7.28 It needs to be acknowledged that it will be difficult to slow the progressive loss of employment land to residential development. There are a number of related reasons for this.

- Offices can be converted to residential property under the existing permitted development rights (PDRs). The Government has recently extended the PDR for office to residential conversion and made it permanent; and has stated that it will extend PDR to allow B1c properties to be converted to residential use. It may or may not proceed with suggested proposals to grant permitted development rights for demolition of offices and redevelopment for residential use.
- As long as EHDC cannot demonstrate that it has a 5 year housing land supply, developers are well positioned to challenge refusal of planning permission for residential development on employment sites, unless there are strong countervailing arguments. If EHDC wishes to protect its employment sites, it needs to be able to demonstrate that it has a 5 year housing land supply.
- Most of the employment sites in Hertford and Ware are within the urban area and close to the respective town centres and to public transport (particularly Hertford East railway station); therefore they are intrinsically well suited to residential use if comprehensive redevelopment is undertaken. The high value of residential land makes redevelopment of sites for residential use much more attractive than redevelopment for business space use or retention for employment uses.
- In May 2016 the Government reinstated the Vacant Building Credit. Guidance states that where a vacant building is brought back into use or is demolished to be replaced by a new building, the local authority should provide a 'financial credit' equivalent to the existing gross floorspace of the relevant vacant building which can be used to offset in the calculation of affordable housing requirements. Changes to Planning Policy Guidance allow authorities to consider if the property has been deliberately made vacant in order to permit redevelopment. However, this provision does further tilt the scales in favour of conversion or redevelopment of existing employment floorspace to residential use.
- The relatively weak market for business space in Hertford and Ware as evidenced by comparatively low rents compared to Bishop's Stortford – Stansted, Welwyn Hatfield and Stevenage, and a relative thin market, makes Hertford and Ware an unattractive place to

undertake speculative development of new business space. The large overhang of cheap industrial property in Harlow is another consideration.

- A further factor that will have a bearing on the supply of cheaper, low quality employment space is that under the Energy Act, 2011 from April 2018 it will be unlawful to let properties that fail to meet a minimum energy performance standard, which will be equivalent to an Energy Performance Certifying (EPC) rating of E. Nationally around 19% of commercial premises have EPC ratings of F and G. Landlords will have to invest in properties if they are to continue to let the properties. This may provide an additional incentive for landlords to seek to secure residential consents particularly if they believe investment or improvements will not be recouped through increased rents.

A Strategy for Retention of Employment Land

7.29 In view of the pressures that there will be on EHDC to release employment sites for residential use throughout Hertford and Ware it is important that EHDC develop a strategy for dealing with applications for change of use. It is not for this study to prescribe what such a strategy should be, but the key actions and decisions that would need to be considered are as follows:

- Seek to ensure as quickly as possible that EHDC can demonstrate that it has a 5 year housing land supply, and ensure that the 5 year housing land supply is maintained. Without this it will be difficult to defend appeals against refusal for change of use of employment land to residential use.
- Develop a coherent case for retention of the remaining employment sites in Hertford and Ware. The evidence in this report provides the starting point for this defence case. It will be important to update the analysis set out in Section 4 of this report with the 2015-16 employment land monitoring data as soon as possible; and to gather and maintain evidence on specific employer requirements in Hertford and Ware.
- Decide whether, as a matter of policy, EHDC will contest any further loss of employment land in Hertford and Ware, or will only do so on a selective basis. The advantage of challenging all change of use from employment use to residential is that EHDC will build up expertise in making the case, and make developers aware that all applications will be contested. The disadvantage is the staff time and actual costs of contesting all applications.
- EHDC will have to accept that in all probability it will lose some cases at appeal. It should always be EHDC's fall-back position that if the site cannot be retained in full for employment use that part of the site should be retained for employment uses with residential development providing an effective cross-subsidy for provision of employment floorspace, unless it is very clear that this is not practicable or viable. Inevitably this will draw EHDC into debates about viability.
- Where a mixed residential and employment scheme is approved, EHDC needs to ensure that the employment site can be retained for the long term; and is effectively marketed. Given the differential in residential and commercial values any landowner/developer will very likely seek to negotiate away at some stage in the future the need to retain the employment land.

A preferred way of preventing this is to ensure that a final phase of residential development cannot proceed until the employment element of the scheme comes forward, or that the Council is satisfied that it has been effectively marketed and there is no prospect of securing the development of employment floorspace on the site.

- There would be considerable advantage if EHDC were able to have an element of control over the marketing of employment sites, rather than this being entirely in the hands of the developers and their consultants. An added requirement, given the value of residential consents and the inherent difficulty of valuing employment land, might be to make it a condition of planning approval that the employment site is marketed at a discount to open market value, so as to be able to achieve the mixed use character of the development scheme given approval.

Developing a Strategy for Re-provision of Employment Sites

- 7.30 Given that there has been, and very likely will continue to be significant loss of employment land to residential use it is important for EHDC to seek to make the most of the best employment sites. Wessex Economics' assessment is that the best of existing employment sites which also have capacity to accommodate further development or offer possibility of redevelopment for employment uses are:
- Marsh Lane, Ware
 - Crane Mead, Ware, and,
 - The Mead Lane Employment Area (not withstanding its relatively poor access)
- 7.31 Consideration should also be given to investigating whether there is scope within the public sector estate around Pegs Lane to make provision for office accommodation for small businesses probably in some form of a business centre. East Hertfordshire has a large number of small firms, many of which are essentially professional service or IT businesses. While many of these businesses can be operated from home, when such businesses start to expand, anecdotal information would suggest many may struggle to find suitable small scale office space. EHDC should consider commissioning a feasibility study into such provision in the Pegs Lane area or in other locations in Hertford and Ware. EHDC may wish to work with Wenta on exploring these proposals.
- 7.32 Finally, it is important to draw EHDC's attention to the fact that the current portfolio of employment site in Hertford and Ware essentially meet local needs, rather than being sites that potentially could attract inward investors. Many of the sites, as previously discussed, have limitations in terms of their functionality with relatively poor access to the trunk road network (the A414 and the A10). The key strategic site is the GSK site in Ware (not assessed by in this study because it is in single ownership). The retention of GSK as the largest private employer in East Herts is of key importance to EHDC and the economy of East Hertfordshire, probably the employment site in East Herts that accommodates the largest number of jobs.
- 7.33 EHDC should be thinking of what can be done to ensure provision of sites in East Herts that are of strategic significance and that can compete directly with sites in the A1(M) corridor and A11 corridor

for inward investment and firms with reasonably large requirements seeking high quality space. There are essentially only two locations in East Hertfordshire likely to attract inward investment on a reasonably large scale. These are Bishop's Stortford and the western A414 gateway into East Herts at Cole Green/Birchall. The respective appeal of these two sites to inward investors and larger scale employers are as follows:

- Bishop's Stortford is strategically located on Junction 8 of the M11 in the immediate vicinity of Stansted Airport and at the mid-point of the London-Stansted-Cambridge corridor. Bishop's Stortford has frequent fast rail connections. In terms of securing future revenue streams from business rates EHDC it is important that good development sites are available close to the M11 within East Hertfordshire. Developments in Uttlesford will create jobs for East Herts residents, but the business rates income will benefit Uttlesford, not East Herts.
- The East Herts Western Gateway at Cole Green/Birchall is the other potential location in East Herts that would have maximum appeal for business space development. The appeal of the site to occupiers will be the ability to recruit from a wider labour catchment area based on Welwyn Hatfield and the A1 (M) corridor. Its key disadvantage is lack of a high volume public transport system and the fact that it is some 4 miles from Junction 4 of the A1M. Proposals for a business park have been put forward as part of the Birchall Garden Suburb proposals.

7.34 If thinking in a 20 to 30 year planning time frame, it would also make sense for EHDC to examine options for allocation one or more new strategic employment sites in the central area of East Herts with strategic connections to the A414/A10 and with the potential to provide a good public transport connection to a railway station (existing or new) on the East Hertford-Ware-London Liverpool St route. The focus of search could usefully concentrate on sites which are not suitable for residential use, probably by virtue of proximity to major roads or for other reasons.

7.35 The possibility of a major strategic employment site in the south eastern corner of the District would seem less likely to be a feasible option, unless there was a clear way to connect the existing dual A414 into the proposed new Junction 7a on the M11. A northern bypass for Harlow linking the A414 to a new M11 junction was first proposed when the M11 was still in planning in the late 1960s and various proposals for a junction have been made ever since. Essex County Council is progressing with proposals for a new M11 Junction 7a at Sheering; but it is proposed that the link road will be Sheering into central Harlow via Gilden Way. This will benefit the Harlow Enterprise Zone but traffic to the A414 in East Herts will still have to go through Harlow.

7.36 To summarise, the review undertaken of employment sites in Hertford and Ware, when taking into account likely changes in the requirements for business space over the next 20 years, would indicate the need for a strategic plan to progressively re-provision employment sites over a 20 year. In such a time frame many of the existing employment sites are likely to become mixed use sites, with some ceasing to be employment sites. To meet future needs for employment space EHDC needs to consider new strategic allocations, while retaining a portfolio of smaller sites.

Hertford and Ware Employment Study

Appendices

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Appendices

- A1. The Study Brief
- A2. EHDC Economic Development Vision and Action Plan
- A3. Detailed Employment Breakdown by Sector
- A4. Summary Statistics and Charts for Business Space Market Areas in the Sub-Region
- A5. Site Appraisals (ex Mead Lane and Dicker Mill)
- A6: Site Appraisal for Mead Land and Dicker Mill
- A7. Analysis of Transport Accessibility of Hertford and Ware
- A8: Reference Documents

Appendix A1. The Hertford and Ware Employment Study Brief

Hertford and Ware Employment Study Technical Brief

1. Introduction

- 1.1 The Council is facing a number of challenges on employment land across the district, but in particular within the towns of Hertford and Ware. The Government's drive for housing growth, the lack of a five-year supply of land for housing and emerging Government policy for permission in principle on registered brownfield land, are making existing employment areas vulnerable to redevelopment for non-employment and residential uses.
- 1.2 A number of studies have been prepared in support of the District Plan, which have concluded that existing employment areas should be retained and that employment areas in Hertford and Ware perform a necessary role, albeit with some areas needing refurbishment. The studies are listed at the end of this document.

2. Purpose

- 2.1 The Council wishes to better understand the current economic situation in the towns of Hertford and Ware in the context of the wider economic geography, the vitality and viability of existing employment areas (both designated and non-designated areas), and the future role these areas may have in supporting housing and economic growth required through the District Plan.

3. Scope of the study

- 3.1 The study should include:
 1. **A review of existing employment studies in so far as they relate to Hertford and Ware** – This should include district, county and LEP studies, where relevant.
 2. **An audit of the existing employment areas** - establishing the baseline of occupancy and quality of designated and non-designated employment areas. This should include a brief survey of building condition.
 3. **An assessment of current and future market demand and supply for employment land and premises** - This should include market testing and liaison with local agents and the local business community and identification of comparable locations in order to market-test options.
 4. **Interventions** – An assessment of the barriers preventing employment areas from thriving, a consideration of what interventions could be applied to unlock these barriers, and whether such interventions would be financially beneficial in the current market and into the future. This could also identify any critical infrastructure required to enable economic growth to assist in the production of an Infrastructure Delivery Plan.
 5. **Set out an economic vision and series of objectives** – for the Hertford and Ware area as a whole; each of the two towns and/or for individual employment areas as appropriate.
 6. **A review of emerging Planning Policy** – national and local context.

Appendix A2. Economic Development Vision and Action Plan for East Hertfordshire 2016/17 to 2019/20

ECONOMIC DEVELOPMENT VISION AND ACTION PLAN FOR EAST HERTS 2016/17-2019/2020

Priority Theme/ Outcome	Why is it important?	Key actions that will help us get there	Timescales				How will we know if we are making a difference?
			16/17	17/18	18/19	19/20	
<p>A business friendly council</p> <p><i>We will ensure we are supporting businesses as 'customers' of council services as well as listening to the needs of the business community</i></p>	<ul style="list-style-type: none"> We have undertaken one off, limited consultation with businesses to help inform the strategy priorities (for example meeting Sawbridgeworth traders and their Town Council representatives). Continuing this dialogue is important given the link between business rates' collection and council funding in future (we will need to increase transparency and accountability to businesses) Large proportion of council customers are businesses (eg. requests for regulatory services/ submitting planning applications/ interactions with business rates' service) No direct evidence that regulatory functions are inhibiting economic growth, however anecdotal feedback from businesses is that a central point of contact/ more coherent support and business liaison is required. 	<ul style="list-style-type: none"> Commission business needs analysis and detailed evidence base focusing on: <ul style="list-style-type: none"> Demand for employment and commercial space (by geography and sector), particularly focusing on Bishop's Stortford Demand for new business incubation space and 'second stage' space for new businesses seeking to grow Sector or specific industry opportunities for East Herts (eg. creative/R&D) Create landing pages for businesses on the Council website consolidating all information and services in one place (Business rates, planning, regulatory functions, procurement, customer profiles etc) Increase self-service options and create user accounts for local businesses to access council services in once place for key council services (aligned to customer services strategy) Maintain membership in and sponsor key events such as the Federation of Small Business (FSB) annual awards/ Chamber of Commerce (CoC) awards Support the "Better Business for All" partnership between Regulatory authorities in Hertfordshire 	↔				<ul style="list-style-type: none"> Business counts (enterprises and local units) Total income from business rates Number of jobs and jobs by sector Gross Value Added (GVA) Transaction/ processing times for business queries/ request for service to be resolved (eg. invoice payment processing times) Qualitative feedback from businesses on a regular basis (measure and questions to be developed in conjunction with FSB and CoC)
<p>Enabling entrepreneurs and business start ups</p> <p><i>We will encourage wealth creation in the district and ensure businesses can access a wide range of locally sourced services</i></p>	<ul style="list-style-type: none"> The East Herts economy is mostly made up of micro-businesses and small to medium sized enterprises (SMEs). Maintaining an environment for entrepreneurs and new businesses to flourish is crucial for the future prosperity of the district Anecdotal feedback from businesses that more support for new businesses is needed (incubation space and stronger networks) 	<ul style="list-style-type: none"> 2 year SLA with WENTA (15/16-16/17) to deliver business start up advice and support (virtual and face to face) and incubation space. Based in Herts Regional College (Ware Campus) Review business start up provision and identify opportunities to improve support Sponsor the CVS "dragons den" event for entrepreneurs in schools Work with the Local Enterprise Partnership's (LEP) on the "growth hub" (an enterprise network for local businesses to source support services such as finance, HR, training etc) 	↔	↔			<ul style="list-style-type: none"> Number of new business registrations Number of businesses still trading after one year Number of new businesses started with WENTA support and number still trading after one year
<p>Supporting the rural economy</p> <p><i>We will maximise investment into the rural economy and ensure it remains competitive</i></p>	<ul style="list-style-type: none"> Evidence in RDP bid suggests growth in rural economy has been slower than urban areas, and that rural businesses (mostly smaller enterprises) are competing with larger (medium sized) urban businesses Employment land review indicates broadband connectivity is a challenge for rural businesses 	<ul style="list-style-type: none"> Deliver the Eastern Plateau Rural Development Programme (RDP) administering EU structural funds (total fund of €1.8m), to rural businesses for increasing productivity, farm diversification, tourism, cultural and heritage activity (NB. Although the 'Eastern Plateau' does not cover urban areas and towns in East Herts, businesses based in Buntingford are eligible to apply for RDP funds) Support communities in rural areas with accessing infrastructure for super-fast broadband by working with the "Connecting Counties" programme and raising awareness of other options 	↔	↔	↔	↔	<ul style="list-style-type: none"> No. of East Herts businesses successful in applying to RDP Amount of £ invested in East Herts through the RDP No. of new jobs in East Herts created through the RDP Percentage of superfast broadband accessibility in the district (defined as over 30 Mb/s)
<p>Vibrant Town</p>	<ul style="list-style-type: none"> Town centres are seeing a decline in the retail offer 	<ul style="list-style-type: none"> Develop a planning framework for Bishop's Stortford, focusing on Old 	↔	↔	↔	↔	<ul style="list-style-type: none"> Vacant units in town

<p>Centres <i>We will ensure our town centres meet the needs and wants of our residents and visitors</i></p>	<p>and an increase in other offers (eg. catering and hospitality sectors). This diversification reflects a global trend in shopping behaviours however feedback from businesses is that increasing footfall in the daytime will help support the retail offer</p> <ul style="list-style-type: none"> Food and drink is increasingly more important for residents in the district, who we know are largely in 9-5 jobs outside of the district. The workplace count is smaller than the resident population hence there is a larger market for spend outside of the weekday 9-5 hours 	<p>River Lane and key adjoining town centre sites and develop a masterplan for Old River Lane</p> <ul style="list-style-type: none"> Ensure employment land and needs are included with site development assessments (eg. Hertford Urban design study) and District Plan Undertake feasibility work with town centre businesses on implementing Business Improvement Districts Work in conjunction with town and parish councils to deliver special events and specialist markets (eg. farmer's markets) to increase footfall in the town centres 	↔	↔	↔	↔	<p>centres</p> <ul style="list-style-type: none"> Town centre footfall Car parks – short stay transactions Car parks – volume to capacity
<p>Supporting the visitor economy <i>We want to raise the profile of local attractions and support businesses in their supply chain</i></p>	<ul style="list-style-type: none"> Value & volume studies of visitor economy (undertaken every 2 years since 1996) shows reasonable growth in visitor economy in East Herts over the past 15 years. Although the district is not a "tourism" destination this is a growth area – value to East Herts economy in 2014 was £230m. There are also venues in the district (eg. Hertford Theatre) which attract visitors 	<ul style="list-style-type: none"> Undertake 2016 value and volume study (for the district as a whole but also focusing on the 5 towns) Work with Visit Herts to increase the profile of local attractions and support businesses in their supply chains 	↔	↔	↔	↔	<ul style="list-style-type: none"> Expenditure on visits to East Herts (annual figure measured through Value and Volume Survey)
<p>Lobbying for the right infrastructure <i>We will work with key partners to ensure East Herts can support growth in the right places at the right times</i></p>	<ul style="list-style-type: none"> Employment land review and HCC Transport Strategy evidence base indicates road and rail infrastructure is a challenge for businesses (as is the state of commercial stock which is outdated and of poorer quality than neighbouring authorities) Bishop's Stortford and A10/ M11 corridor identified as a key area for future growth nationally (linked to Stansted Airport as well as growth in Cambridge and London economies). We are awaiting Growth Commission findings for infrastructure needs particularly the affects of Crossrail 2 and the West Anglia Route 	<ul style="list-style-type: none"> Work with partners such as the LEP, County Council and London Stansted Cambridge Consortium (LSOC) on identifying infrastructure requirements for the A10/ M11 corridor and bring them to fruition Liaise with the LEP to understand strategic needs of businesses in East Hertfordshire and lobby for East Herts interests 	↔	↔	↔	↔	<ul style="list-style-type: none"> Investment (£) in transport infrastructure within the district

Other areas have been considered however have not been included at this stage:

- The skills agenda:** currently the economic development team liaise with Hertford Regional College through occasional partnership meetings and likewise with the University of Hertfordshire through the LEP. Engagement with local schools is limited to the Dragons Den programme which is very small scale. Evidence suggests overall skill levels are not a challenge in East Herts (the skills base in the work place is lower than that of the resident workforce). There is evidence to suggest people in their mid 20's leave the district for opportunities elsewhere (and return in their late 30's) however this can in part be attributed to opportunities for career development within London and Cambridge. The council could consider working with local businesses and other public sector organisations to create more apprenticeship/ graduate placements (eg. by match funding). This would require additional assessment and consultation with businesses about skill shortages in particular sectors (this may be an issue but no deeper analysis has been undertaken). However the skills agenda is much more important for the LEP and the county as a whole
- Employment initiatives:** evidence shows that unemployment is not a large concern within the district. Even the most statistically deprived wards (Hertford Sele, Ware Trinity and Bishops's Stortford Central) have low unemployment rates (4.6%, 3.9% and 3.7% respectively) compared to the national average of 4.4%. As a consequence no projects or initiatives to increase our resident's employability have been put forward
- Regeneration of urban areas:** many local authorities who invest a lot in economic development often focus their strategy on regenerating brown field sites in town centres or industrial parks (eg. enterprise zones). Given the geographic make up of East Herts this hasn't been an agenda which has been pursued. The lack of space and available sites remains a key barrier for this hence economic development hasn't had a large role to play in planning policy. Old River Lane and opportunities around Bishop's Stortford North in general may change this going forward. We are also in the process of investigating Business Improvement Districts to regenerate town centres

Appendix A3. Detailed Employment Breakdown by Sector

Detailed Employment Sectors, 50+ jobs, Hertford and Ware, 2014

	Employment	% of all Employment	Hertford and Ware LQ
31 : Manufacture of furniture	100	0.2%	0.7
75 : Veterinary activities	100	0.2%	0.7
27 : Manufacture of electrical equipment	100	0.2%	0.6
91 : Libraries, archives, museums and other cultural activities	100	0.2%	0.4
26 : Manufacture of computer, electronic and optical products	100	0.2%	0.6
33 : Repair and installation of machinery and equipment	100	0.3%	1.0
10 : Manufacture of food products	100	0.3%	1.5
79 : Travel agency, tour operator and other reservation service and related activities	100	0.4%	1.4
20 : Manufacture of chemicals and chemical products	100	0.4%	2.3
28 : Manufacture of machinery and equipment n.e.c.	100	0.4%	0.6
94 : Activities of membership organisations	100	0.4%	0.7
52 : Warehousing and support activities for transportation	100	0.5%	0.8
49 : Land transport and transport via pipelines	200	0.6%	1.1
66 : Activities auxiliary to financial services and insurance activities	200	0.7%	1.3
55 : Accommodation	200	0.8%	0.5
22 : Manufacture of rubber and plastic products	200	0.8%	1.8
93 : Sports activities and amusement and recreation activities	200	0.8%	0.6
58 : Publishing activities	200	0.8%	1.8
25 : Manufacture of fabricated metal products, except machinery and equipment	200	0.9%	0.9
96 : Other personal service activities	200	0.9%	1.1
74 : Other professional, scientific and technical activities	300	0.9%	0.9
64 : Financial service activities, except insurance and pension funding	300	1.0%	1.1
61 : Telecommunications	300	1.0%	1.3
53 : Postal and courier activities	300	1.0%	1.5
41 : Construction of buildings	300	1.2%	0.8
82 : Office administrative, office support and other business support activities	400	1.4%	1.2
42 : Civil engineering	400	1.5%	1.4
86 : Human health activities	400	1.5%	0.7
18 : Printing and reproduction of recorded media	400	1.5%	1.6
45 : Wholesale and retail trade and repair of motor vehicles and motorcycles	400	1.6%	0.6
68 : Real estate activities	500	2.0%	1.2
71 : Architectural and engineering activities; technical testing and analysis	600	2.1%	1.2
87 : Residential care activities	600	2.1%	0.6
73 : Advertising and market research	600	2.2%	2.0
72 : Scientific research and development	800	2.9%	2.0
43 : Specialised construction activities	800	3.0%	0.7
88 : Social work activities without accommodation	800	3.1%	1.1
78 : Employment activities	900	3.3%	0.5
62 : Computer programming, consultancy and related activities	1,000	3.5%	1.2
69 : Legal and accounting activities	1,100	4.2%	1.2
56 : Food and beverage service activities	1,300	4.6%	0.8
46 : Wholesale trade, except of motor vehicles and motorcycles	1,300	4.7%	1.1
81 : Services to buildings and landscape activities	1,300	4.9%	1.1
70 : Activities of head offices; management consultancy activities	1,400	5.2%	1.4
47 : Retail trade, except of motor vehicles and motorcycles	1,700	6.4%	0.8
21 : Manufacture of basic pharmaceutical products and pharmaceutical preparations	1,900	6.9%	2.3
84 : Public administration and defence; compulsory social security	1,900	6.9%	2.1
85 : Education	2,100	7.9%	0.8

Source: BRES 2014; figures rounded to the nearest 100

Appendix A4. Summary Statistics and Charts for Business Space Market Areas in the Sub-Region

Hertford Ware - Sub Market Analysis (End April 2016)

Offices

Figure 1: Office Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£11.84	£13.01	Existing Buildings	173	173
Vacancy Rate	1.9%	4.5%	Existing SF	822,398	822,398
Vacant SF	15,565	37,207	12 Mo. Const. Starts	0	0
Availability Rate	2.2%	6.3%	Under Construction	0	0
Available SF	18,421	51,781	12 Mo. Deliveries	0	0
Sublet SF	1,074	4,368			
Months on Market	14.2	19.8			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	12,629	5,875	Sale Price Per SF	£167	£133
12 Mo. Leasing SF	11,014	10,345	Asking Price Per SF	£167	£154
			Sales Volume (Mil.)	£0.6	£4.0
			Yield	-	8.4%

Figure 2: Office Vacancy and Availability Rate 2006-2015



Figure 3: Office Occupancy and Rents (£ per sq ft) 2006-2015

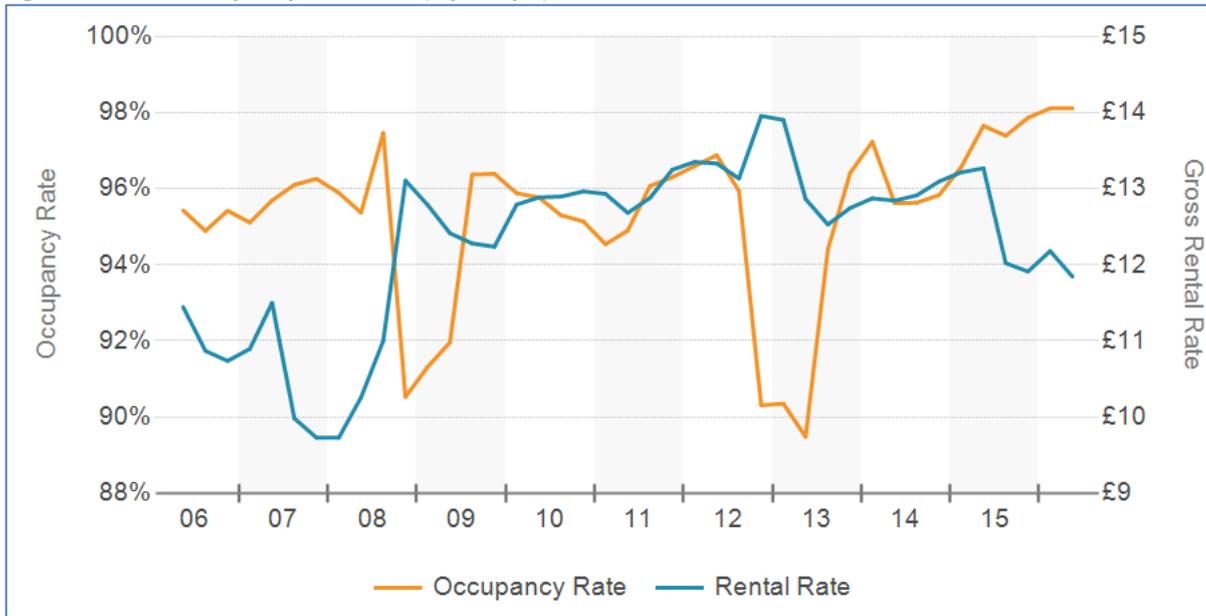
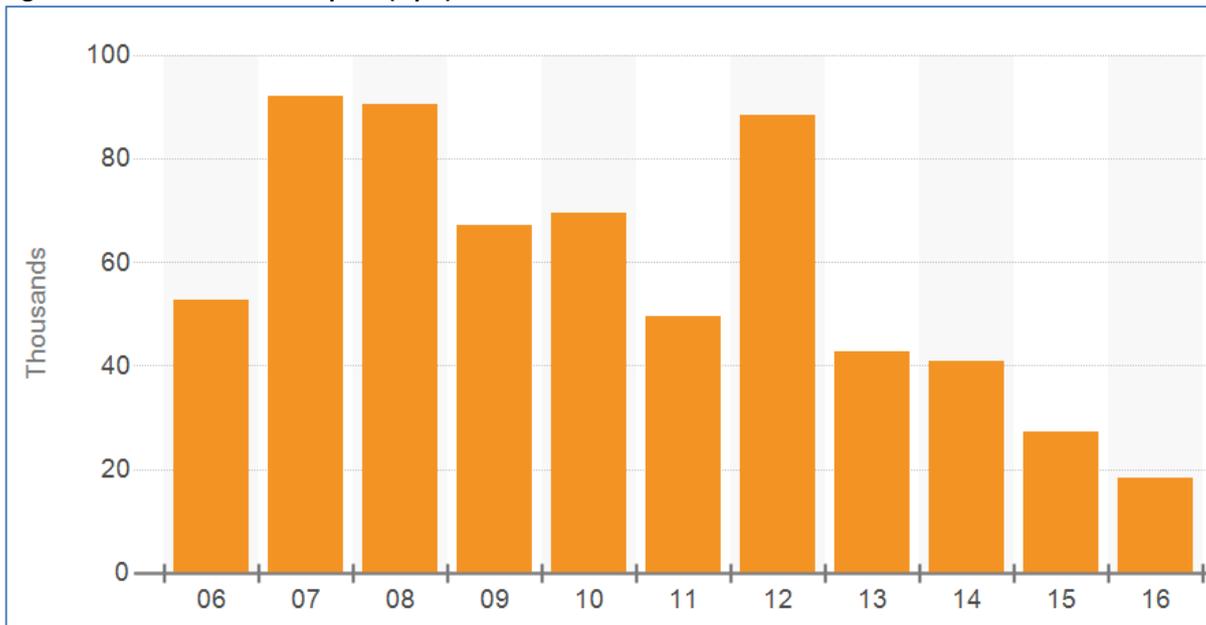


Figure 4: Office Vacant Floorspace (sq ft) 2006-15



Industrial

Figure 1: Industrial Summary Statistics

Availability			Inventory		
	Survey	5-Year Avg		Survey	5-Year Avg
Rent Per SF	£7.48	£6.10	Existing Buildings	70	70
Vacancy Rate	1.0%	2.0%	Existing SF	2,286,730	2,286,730
Vacant SF	23,912	45,783	12 Mo. Const. Starts	0	0
Availability Rate	1.0%	3.1%	Under Construction	0	0
Available SF	23,912	70,146	12 Mo. Deliveries	0	0
Sublet SF	0	10,477			
Months on Market	6.2	19.7			
Demand			Sales		
	Survey	5-Year Avg		Past Year	5-Year Avg
12 Mo. Absorption SF	-15,998	19,843	Sale Price Per SF	-	£54
12 Mo. Leasing SF	17,936	41,645	Asking Price Per SF	£62	£62
			Sales Volume (Mil.)	-	£4.2
			Yield	-	6.6%

Figure 2: Industrial Vacancy and Availability Rate 2009-2015



Figure 3: Industrial Occupancy and Rents (£ per sq ft) 2009-2015

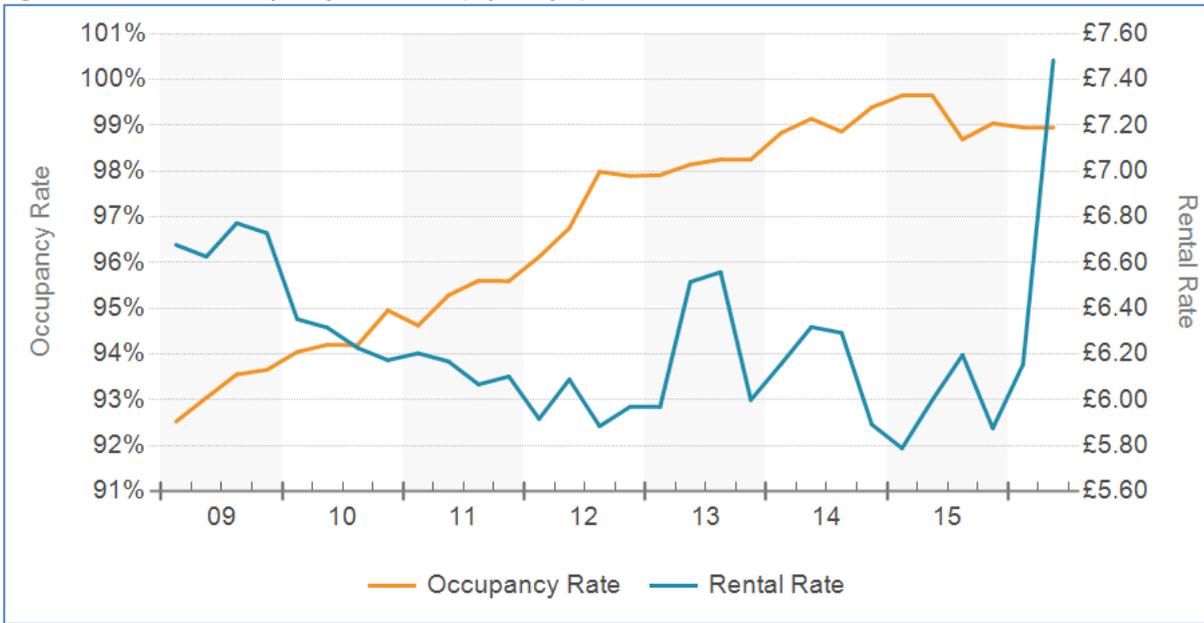
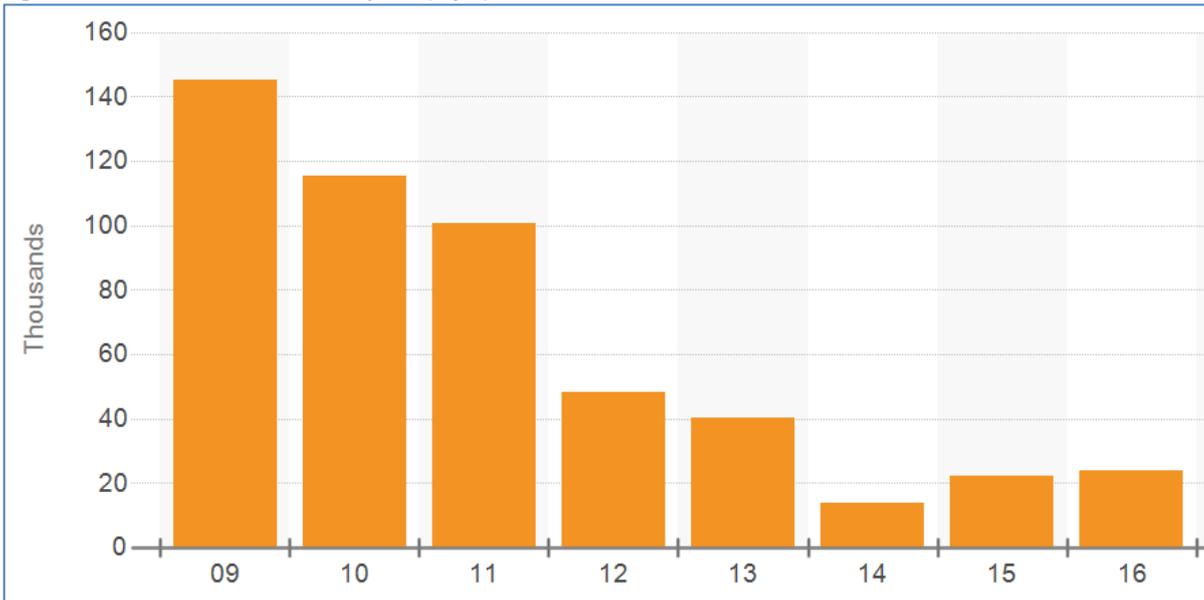


Figure 4: Industrial Vacant Floorspace (sq ft) 2009-2015



Welwyn Hatfield - Sub Market Analysis (End April 2016)

Offices

Figure 1: Office Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£18.00	£17.11	Existing Buildings	149	149
Vacancy Rate	6.1%	16.8%	Existing SF	3,126,049	3,103,969
Vacant SF	189,886	520,339	12 Mo. Const. Starts	0	18,550
Availability Rate	6.6%	19.4%	Under Construction	0	18,550
Available SF	205,488	606,707	12 Mo. Deliveries	0	23,497
Sublet SF	20,290	113,437			
Months on Market	31.5	21.7			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	273,375	94,881	Sale Price Per SF	£113	£99
12 Mo. Leasing SF	93,367	108,558	Asking Price Per SF	£92	£84
			Sales Volume (Mil.)	£25	£7.4
			Yield	9.5%	9.5%

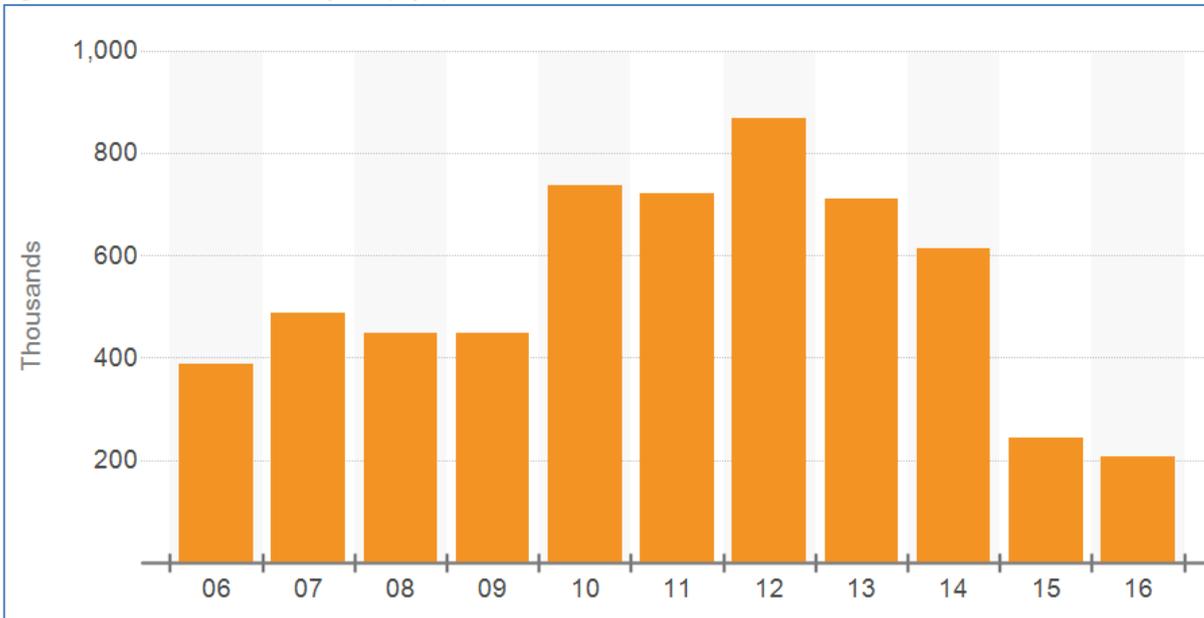
Figure 2: Office Vacancy and Availability Rate 2006-2015



Figure 3: Office Occupancy and Rents (£ per sq ft) 2006-2015



Figure 4: Office Vacant Floorspace (sq ft) 2006-15



Industrial

Figure 1: Industrial Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£6.68	£6.28	Existing Buildings	179	178
Vacancy Rate	2.4%	11.2%	Existing SF	7,317,653	7,159,971
Vacant SF	173,455	801,808	12 Mo. Const. Starts	0	97,035
Availability Rate	3.2%	11.3%	Under Construction	0	72,776
Available SF	237,197	812,861	12 Mo. Deliveries	0	126,146
Sublet SF	0	34,880			
Months on Market	11.2	17.2			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	-58,322	389,065	Sale Price Per SF	£36	£124
12 Mo. Leasing SF	166,265	323,160	Asking Price Per SF	£133	£82
			Sales Volume (Mil.)	£0.3	£21
			Yield	-	6.7%

Figure 2: Industrial Vacancy and Availability Rate 2009-2015

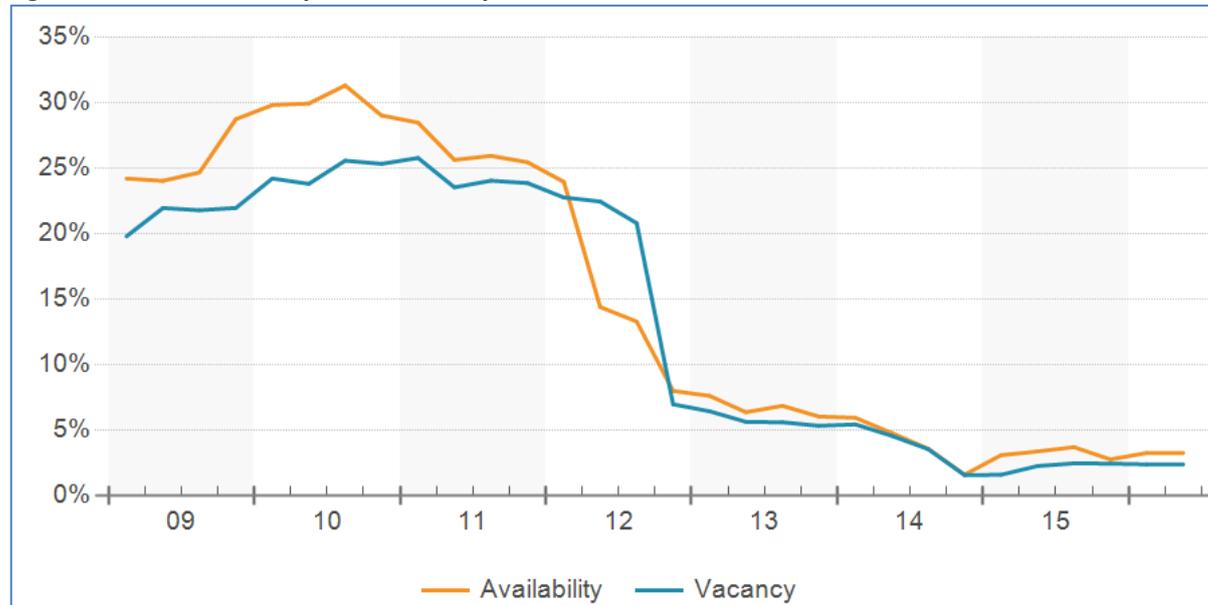


Figure 3: Industrial Occupancy and Rents (£ per sq ft) 2009-2015

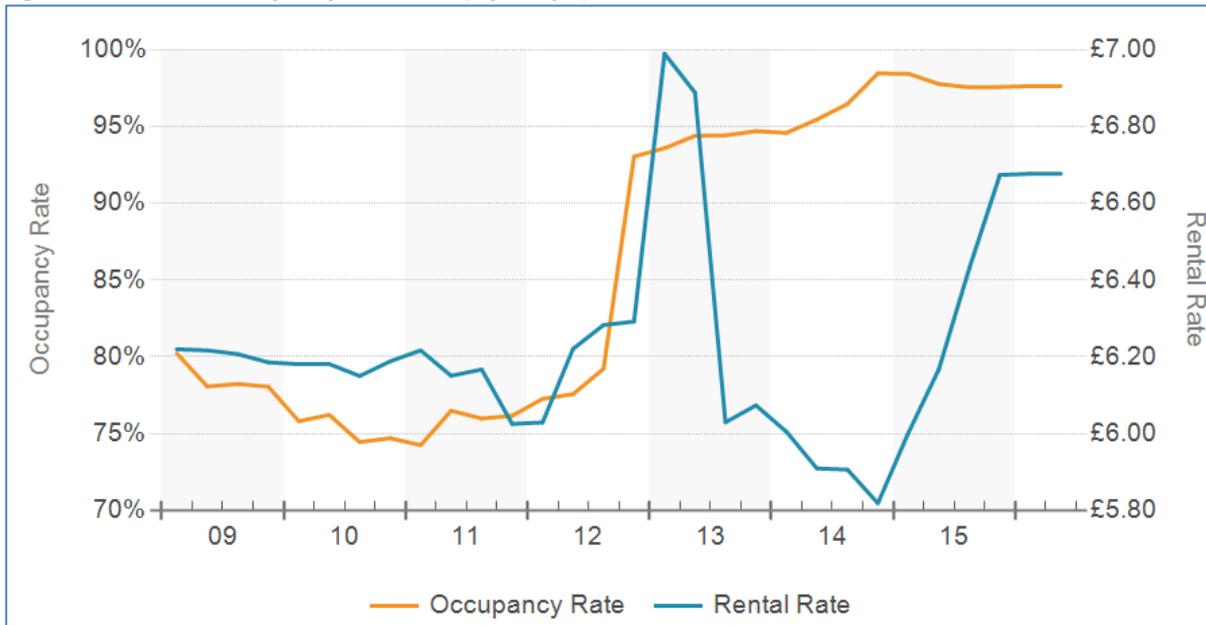
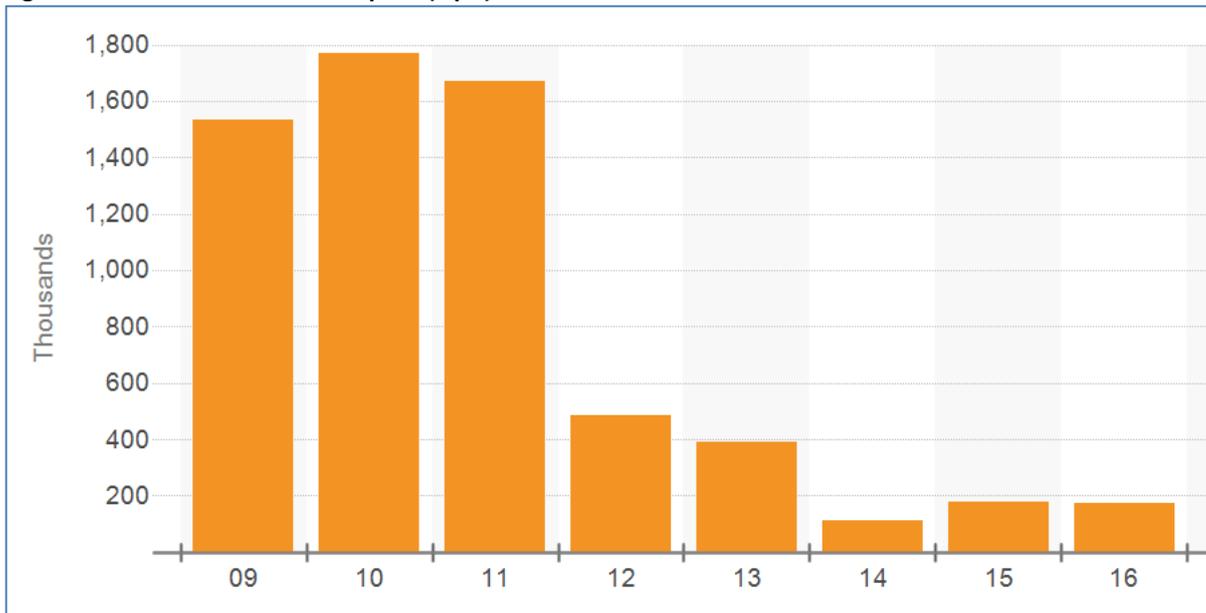


Figure 4: Industrial Vacant Floorspace (sq ft) 2009-2015



Stevenage - Sub Market Analysis (End April 2016)

Offices

Figure 1: Office Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£13.85	£13.38	Existing Buildings	133	133
Vacancy Rate	4.0%	8.3%	Existing SF	2,144,260	2,139,698
Vacant SF	85,377	177,880	12 Mo. Const. Starts	0	0
Availability Rate	5.6%	11.8%	Under Construction	0	9,000
Available SF	120,202	252,665	12 Mo. Deliveries	0	8,571
Sublet SF	16,419	20,654			
Months on Market	15.1	22.5			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	53,168	42,286	Sale Price Per SF	£80	£73
12 Mo. Leasing SF	61,748	60,869	Asking Price Per SF	£129	£112
			Sales Volume (Mil.)	£33	£8.1
			Yield	5.6%	8.2%

Figure 2: Office Vacancy and Availability Rate 2006-2016



Figure 3: Office Occupancy and Rents (£ per sq ft) 2006-2016

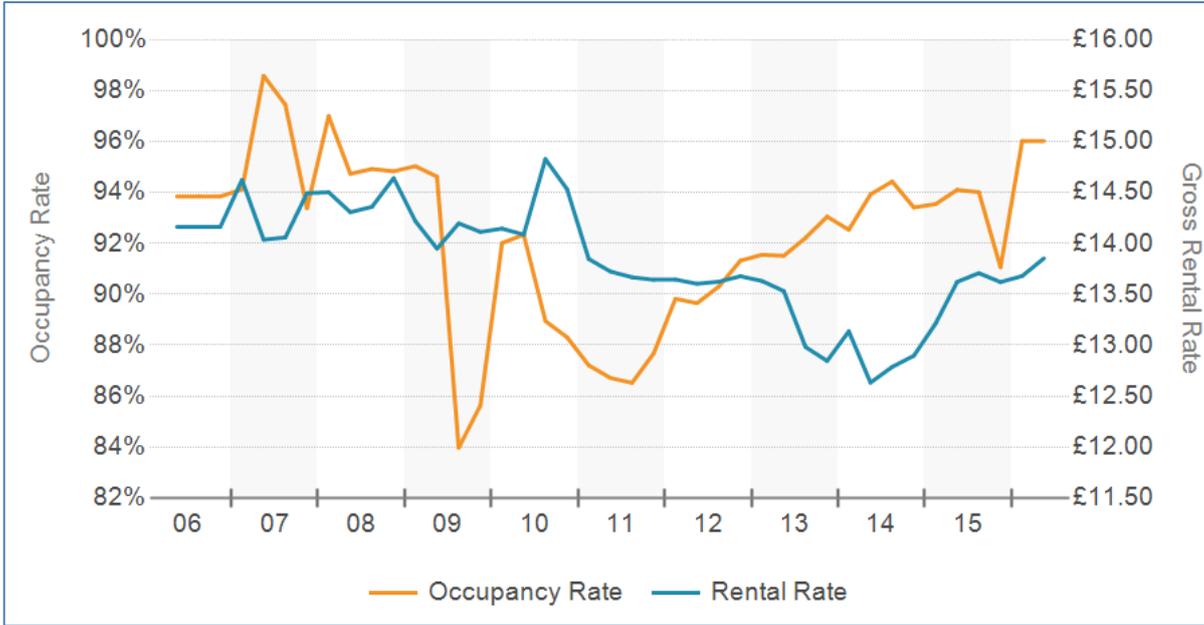
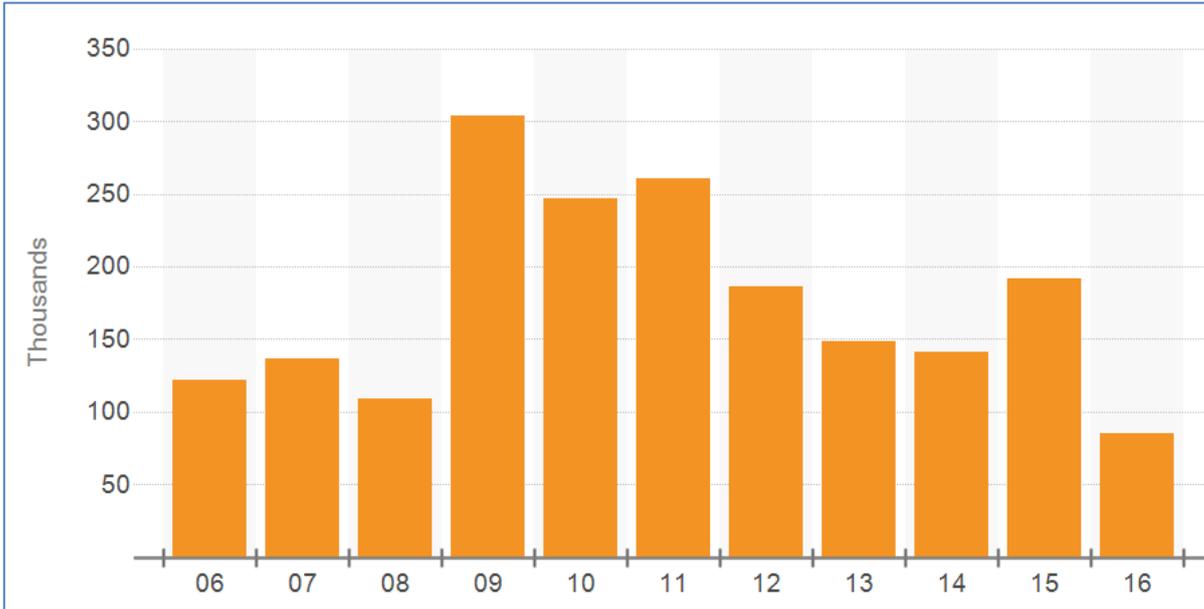


Figure 4: Office Vacant Floorspace (sq ft) 2006-2016



Industrial

Figure 1: Industrial Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£7.68	£6.54	Existing Buildings	184	184
Vacancy Rate	3.8%	4.9%	Existing SF	4,401,571	4,401,323
Vacant SF	169,145	215,991	12 Mo. Const. Starts	0	0
Availability Rate	5.7%	7.7%	Under Construction	0	248
Available SF	250,705	336,945	12 Mo. Deliveries	0	551
Sublet SF	28,667	12,585			
Months on Market	11.2	16.1			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	-9,023	29,091	Sale Price Per SF	£81	£75
12 Mo. Leasing SF	146,081	105,636	Asking Price Per SF	£67	£58
			Sales Volume (Mil.)	£16	£8.8
			Yield	4.7%	6.4%

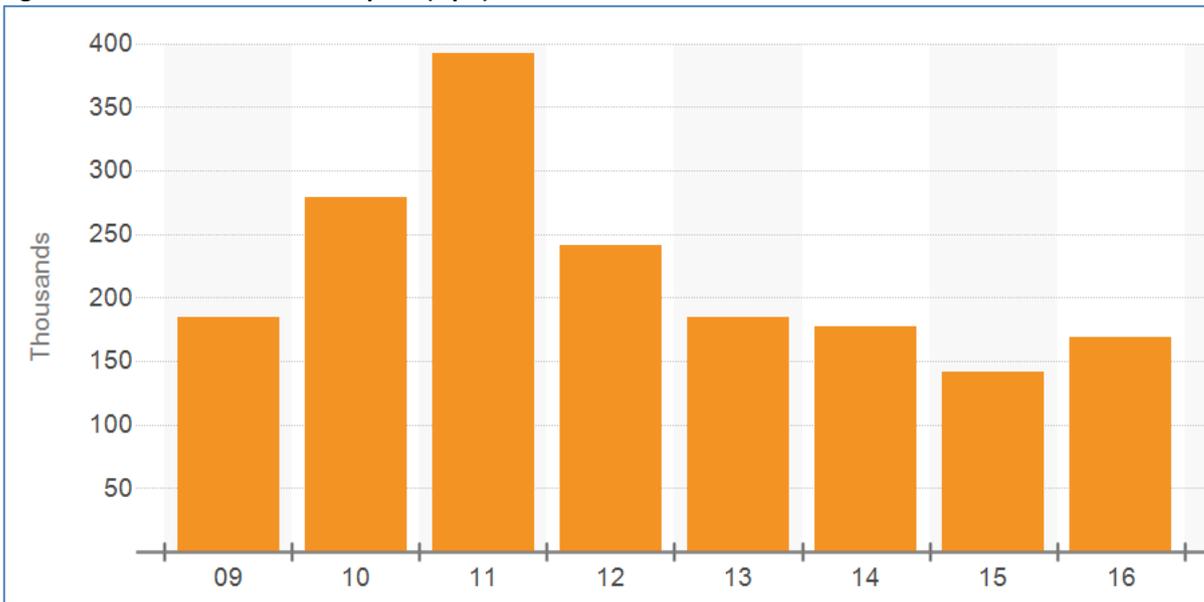
Figure 2: Industrial Vacancy and Availability Rate 2009-2016



Figure 3: Industrial Occupancy and Rents (£ per sq ft) 2009-2016



Figure 4: Industrial Vacant Floorspace (sq ft) 2009-2016



Bishops Stortford - Stansted Sub Market Analysis (End April 2016)

Offices

Figure 1: Office Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£16.91	£16.34	Existing Buildings	186	183
Vacancy Rate	8.2%	10.6%	Existing SF	1,028,676	975,441
Vacant SF	84,349	103,350	12 Mo. Const. Starts	0	23,557
Availability Rate	11.3%	12.9%	Under Construction	0	24,085
Available SF	116,161	127,903	12 Mo. Deliveries	34,249	30,712
Sublet SF	28,333	20,827			
Months on Market	20.3	15.2			
			Sales	Past Year	5-Year Avg
			Sale Price Per SF	£101	£169
Demand	Survey	5-Year Avg	Asking Price Per SF	£260	£226
12 Mo. Absorption SF	43,320	20,657	Sales Volume (Mil.)	£0.1	£1.2
12 Mo. Leasing SF	42,155	30,878	Yield	-	-

Figure 2: Office Vacancy and Availability Rate 2006-2016



Figure 3: Office Occupancy and Rents (£ per sq ft) 2006-2016

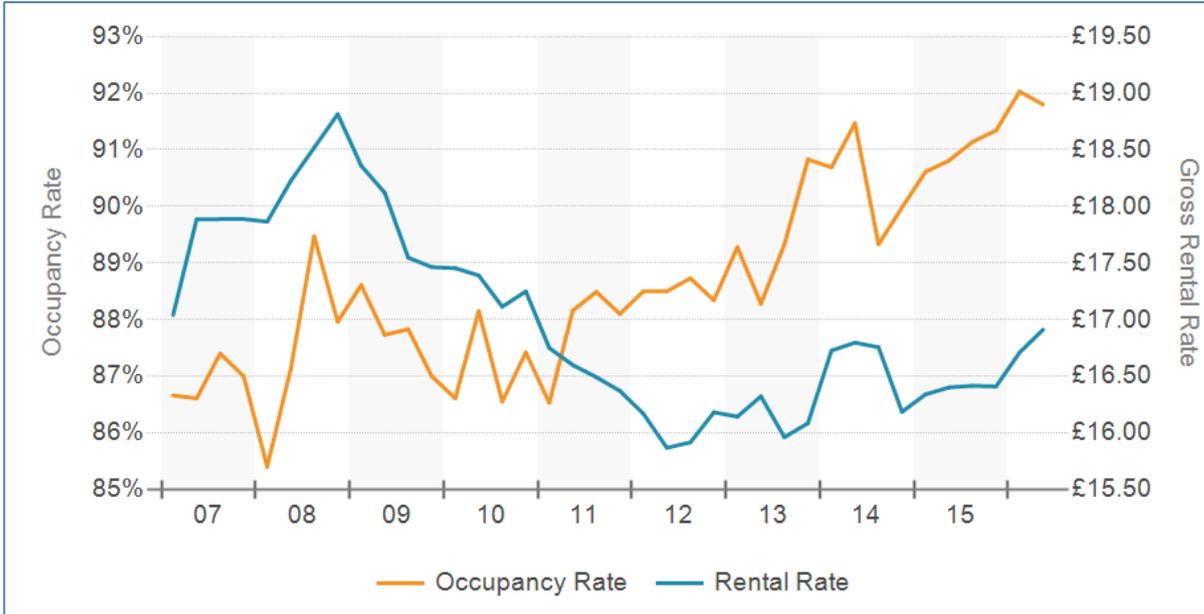
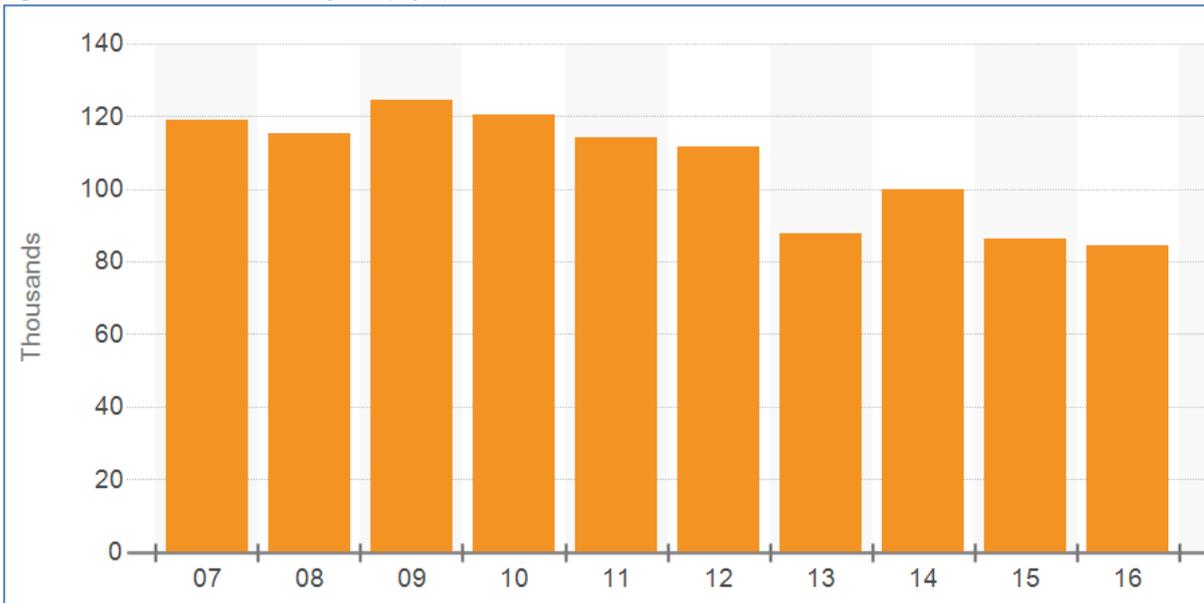


Figure 4: Office Vacant Floorspace (sq ft) 2007-2016



Industrial

Figure 1: Industrial Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£8.39	£9.01	Existing Buildings	107	105
Vacancy Rate	3.4%	9.0%	Existing SF	2,943,558	2,877,944
Vacant SF	99,232	259,232	12 Mo. Const. Starts	0	17,181
Availability Rate	3.0%	10.1%	Under Construction	0	18,751
Available SF	88,722	293,651	12 Mo. Deliveries	74,425	25,129
Sublet SF	28,760	26,012			
Months on Market	13.9	15.8			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	48,511	148,172	Sale Price Per SF	£324	£142
12 Mo. Leasing SF	64,638	70,168	Asking Price Per SF	£91	£35
			Sales Volume (Mil.)	£14	£3.2
			Yield	6.7%	6.7%

Figure 2: Industrial Vacancy and Availability Rate 2009-2016

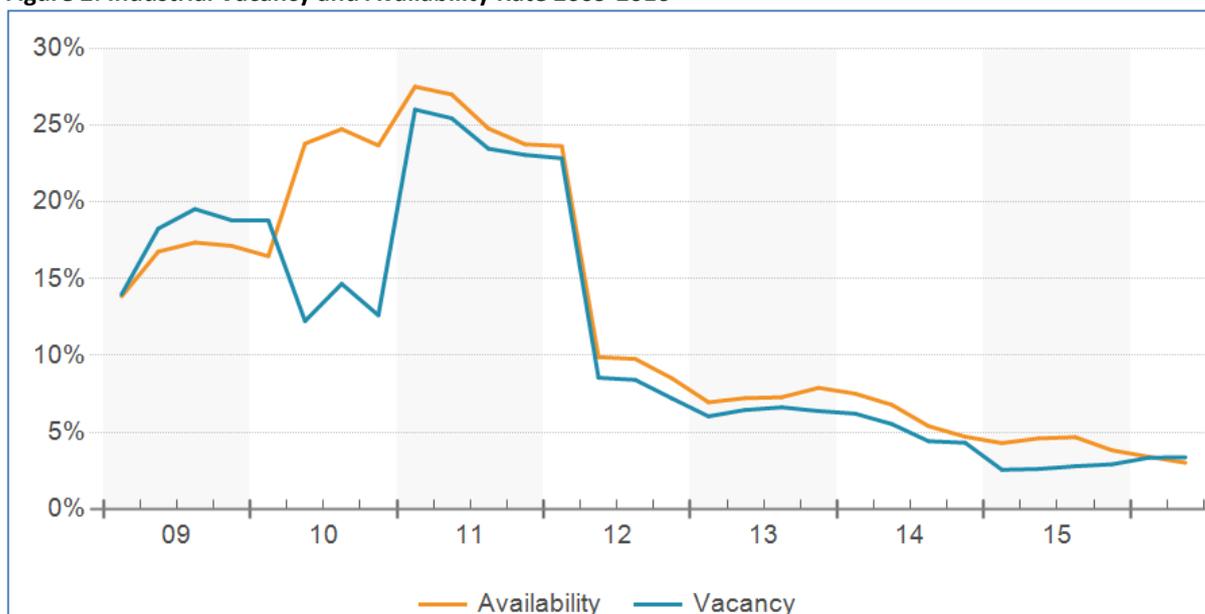
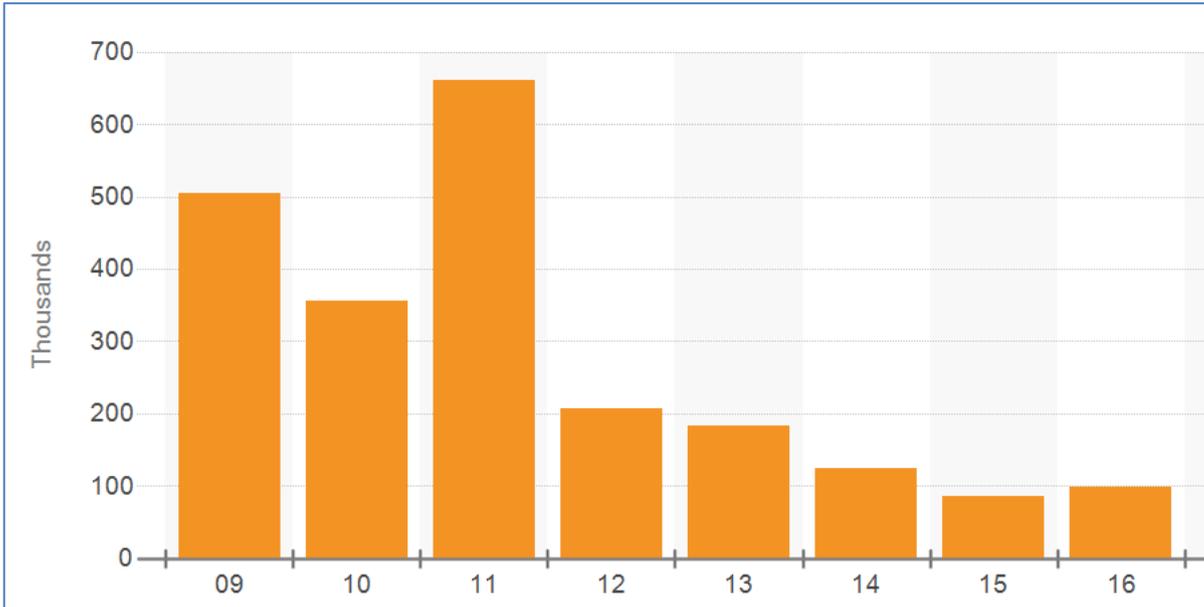


Figure 3: Industrial Occupancy and Rents (£ per sq ft) 2009-2016



Figure 4: Industrial Vacant Floorspace (sq ft) 2009-2016



Harlow Sub Market Analysis (End April 2016)

Offices

Figure 1: Office Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£11.49	£11.20	Existing Buildings	65	65
Vacancy Rate	7.6%	5.7%	Existing SF	1,502,317	1,501,939
Vacant SF	114,766	85,386	12 Mo. Const. Starts	0	0
Availability Rate	10.1%	7.7%	Under Construction	0	0
Available SF	151,083	116,298	12 Mo. Deliveries	0	0
Sublet SF	33,100	18,023			
Months on Market	9.3	25.0			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	106	-20,880	Sale Price Per SF	£116	£147
12 Mo. Leasing SF	6,253	18,036	Asking Price Per SF	£106	£106
			Sales Volume (Mil.)	£6.1	£6.8
			Yield	-	9.7%

Figure 2: Office Vacancy and Availability Rate 2006-2016



Figure 3: Office Occupancy and Rents (£ per sq ft) 2006-2016

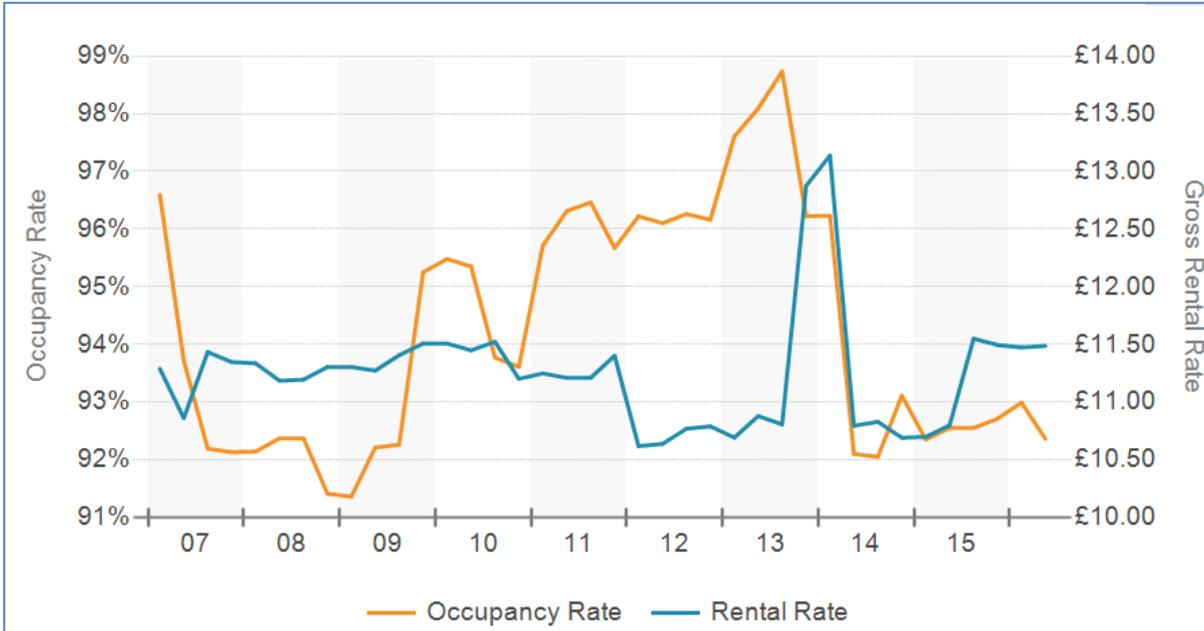
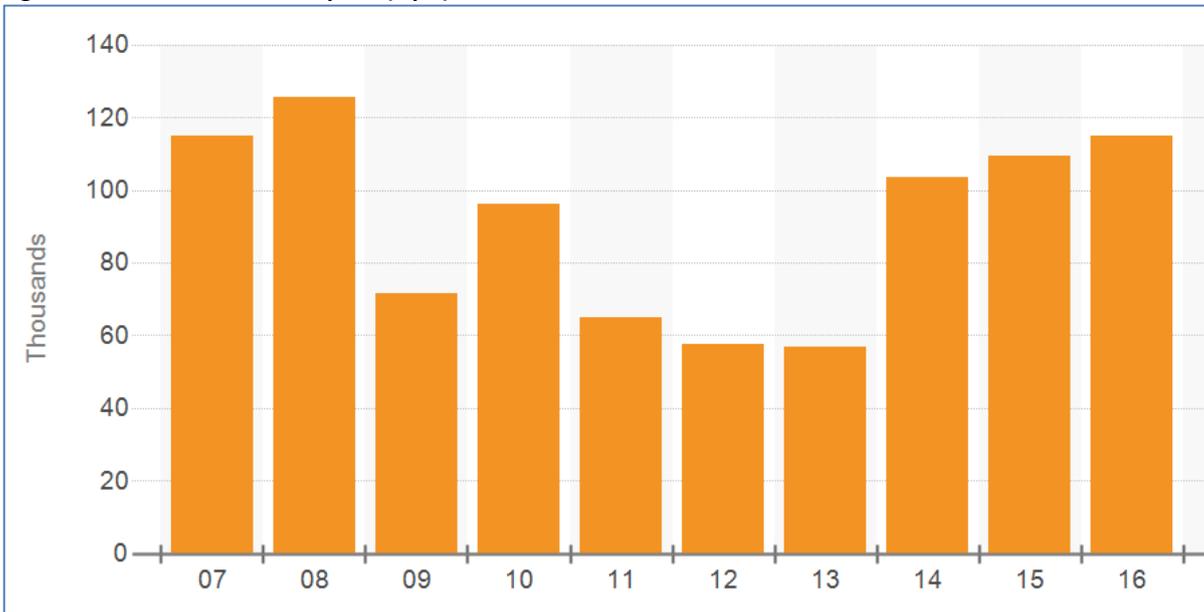


Figure 4: Office Vacant Floorspace (sq ft) 2007-2016



Industrial

Figure 1: Industrial Summary Statistics

Availability			Inventory		
	Survey	5-Year Avg		Survey	5-Year Avg
Rent Per SF	£7.11	£7.02	Existing Buildings	193	193
Vacancy Rate	7.8%	5.6%	Existing SF	6,985,443	6,969,927
Vacant SF	545,520	388,999	12 Mo. Const. Starts	0	7,466
Availability Rate	9.2%	8.4%	Under Construction	0	3,733
Available SF	639,885	584,597	12 Mo. Deliveries	0	8,614
Sublet SF	8,324	3,918			
Months on Market	10.0	15.1	Sales		
				Past Year	5-Year Avg
			Sale Price Per SF	£135	£86
			Asking Price Per SF	£60	£43
			Sales Volume (Mil.)	£37	£18
			Yield	5.0%	7.8%
Demand					
	Survey	5-Year Avg			
12 Mo. Absorption SF	-106,412	45,949			
12 Mo. Leasing SF	48,230	136,961			

Figure 2: Industrial Vacancy and Availability Rate 2009-2016

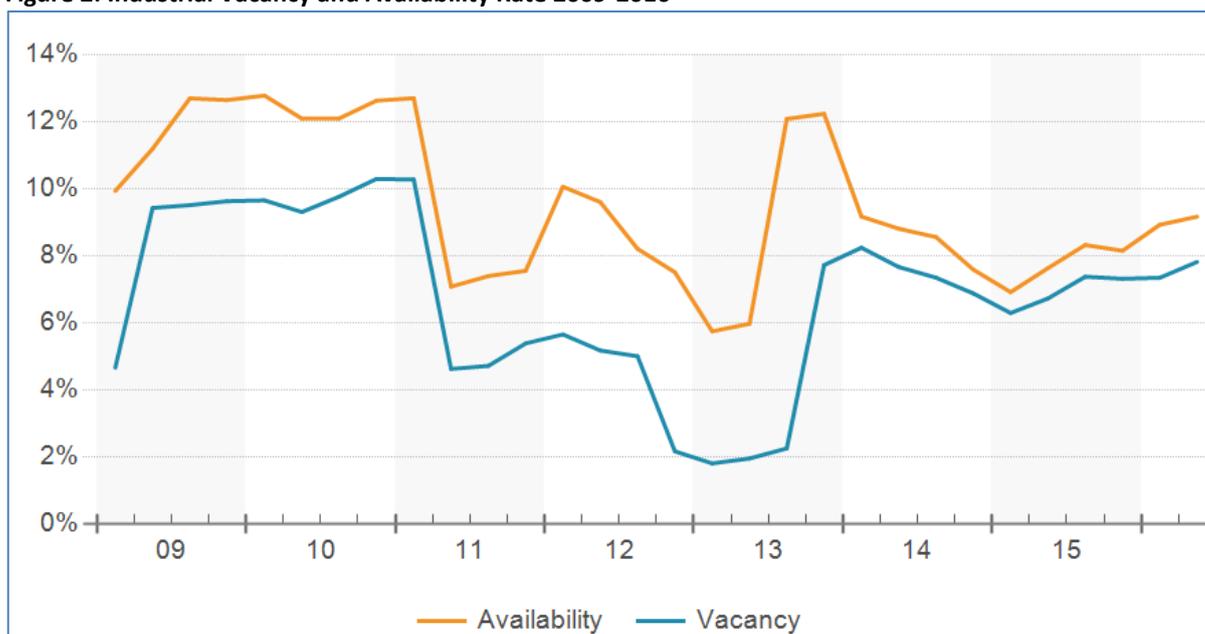


Figure 3: Industrial Occupancy and Rents (£ per sq ft) 2009-2016

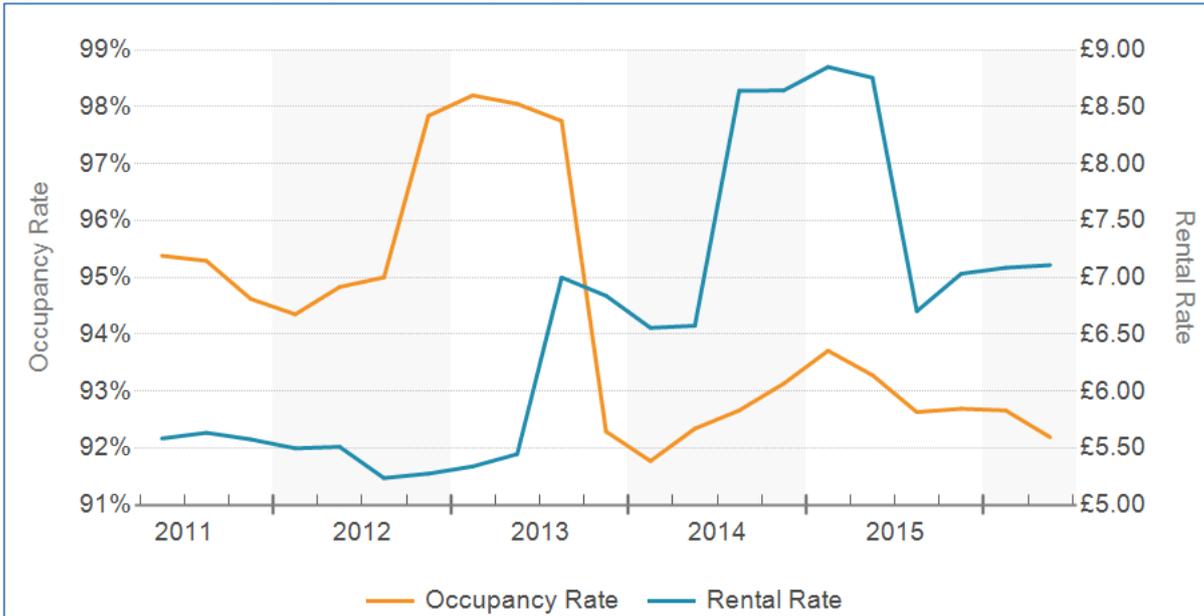
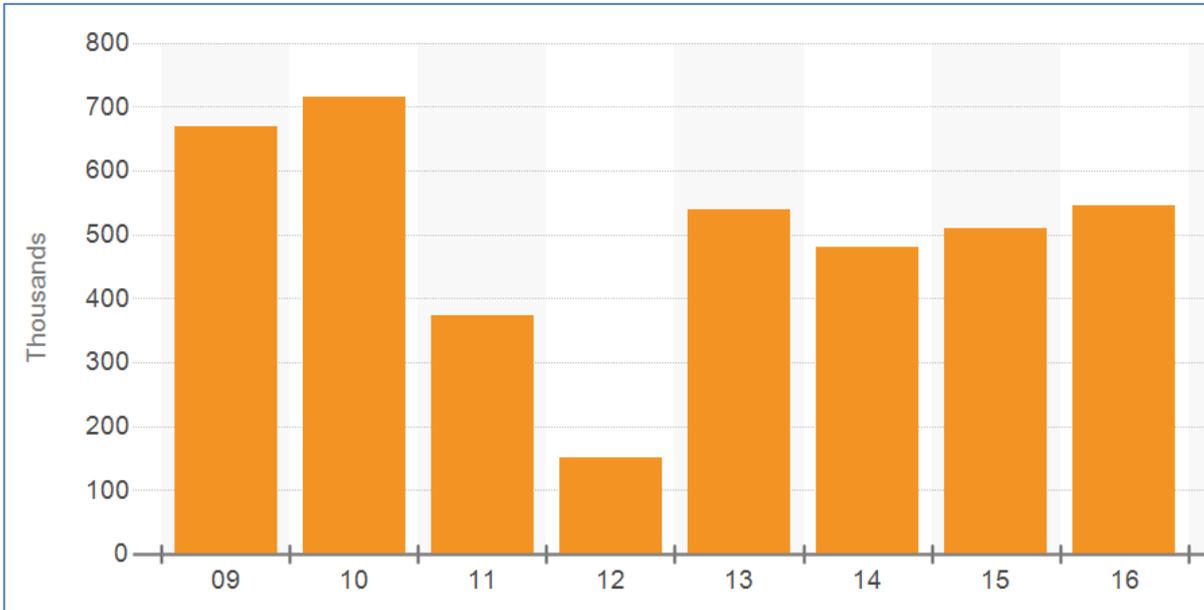


Figure 4: Industrial Vacant Floorspace (sq ft) 2009-2016



Broxbourne Sub Market Analysis (End April 2016)

Offices

Figure 1: Office Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£16.25	£13.72	Existing Buildings	84	84
Vacancy Rate	3.9%	5.0%	Existing SF	888,483	888,483
Vacant SF	34,361	44,034	12 Mo. Const. Starts	0	0
Availability Rate	19.8%	10.6%	Under Construction	0	0
Available SF	175,868	94,295	12 Mo. Deliveries	0	0
Sublet SF	2,092	10,351			
Months on Market	12.1	18.7			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	4,748	9,578	Sale Price Per SF	-	£57
12 Mo. Leasing SF	6,500	14,608	Asking Price Per SF	-	£143
			Sales Volume (Mil.)	-	£0.4
			Yield	-	-

Figure 2: Office Vacancy and Availability Rate 2006-2016



Figure 3: Office Occupancy and Rents (£ per sq ft) 2006-2016

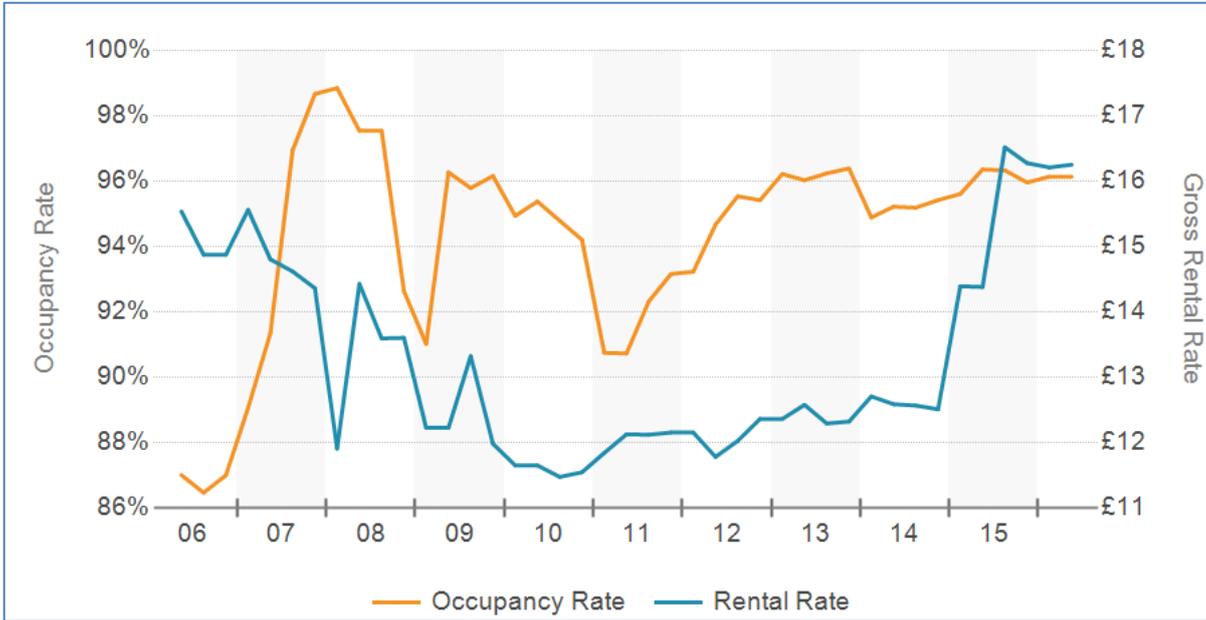
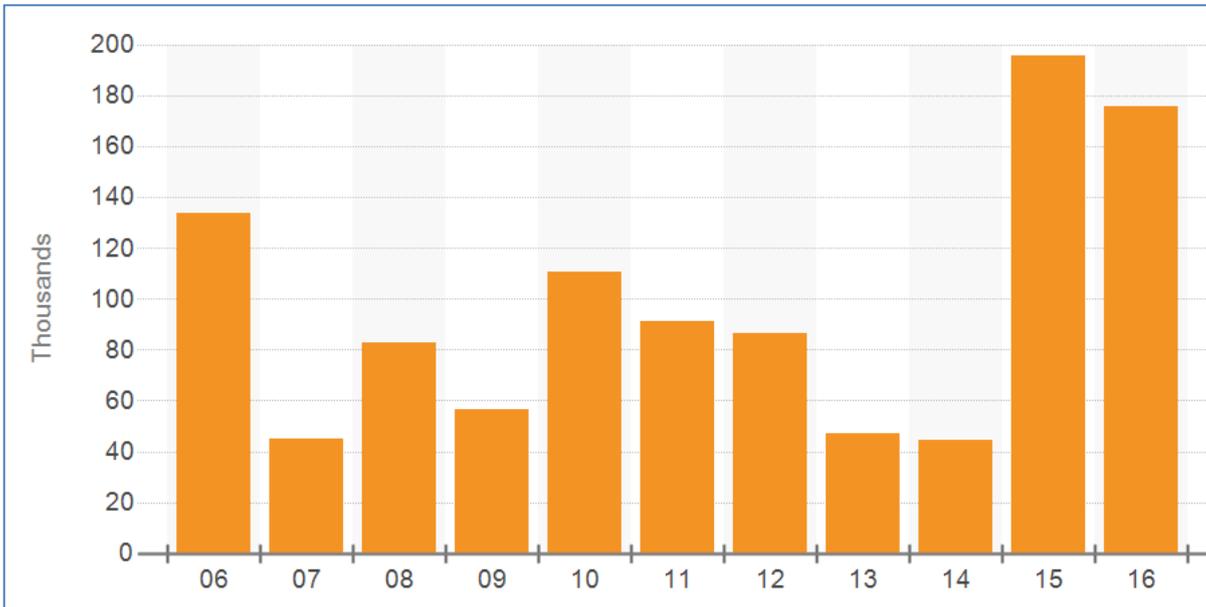


Figure 4: Office Vacant Floorspace (sq ft) 2007-2016



Industrial

Figure 1: Industrial Summary Statistics

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
Rent Per SF	£7.60	£7.08	Existing Buildings	140	140
Vacancy Rate	1.5%	2.4%	Existing SF	4,301,977	4,293,684
Vacant SF	63,773	104,750	12 Mo. Const. Starts	0	8,615
Availability Rate	2.7%	5.4%	Under Construction	0	4,415
Available SF	114,603	231,381	12 Mo. Deliveries	0	10,426
Sublet SF	48,432	52,729			
Months on Market	23.2	12.3			
Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	-34,646	35,116	Sale Price Per SF	-	£31
12 Mo. Leasing SF	12,822	112,555	Asking Price Per SF	£70	£48
			Sales Volume (Mil.)	-	£1.0
			Yield	-	-

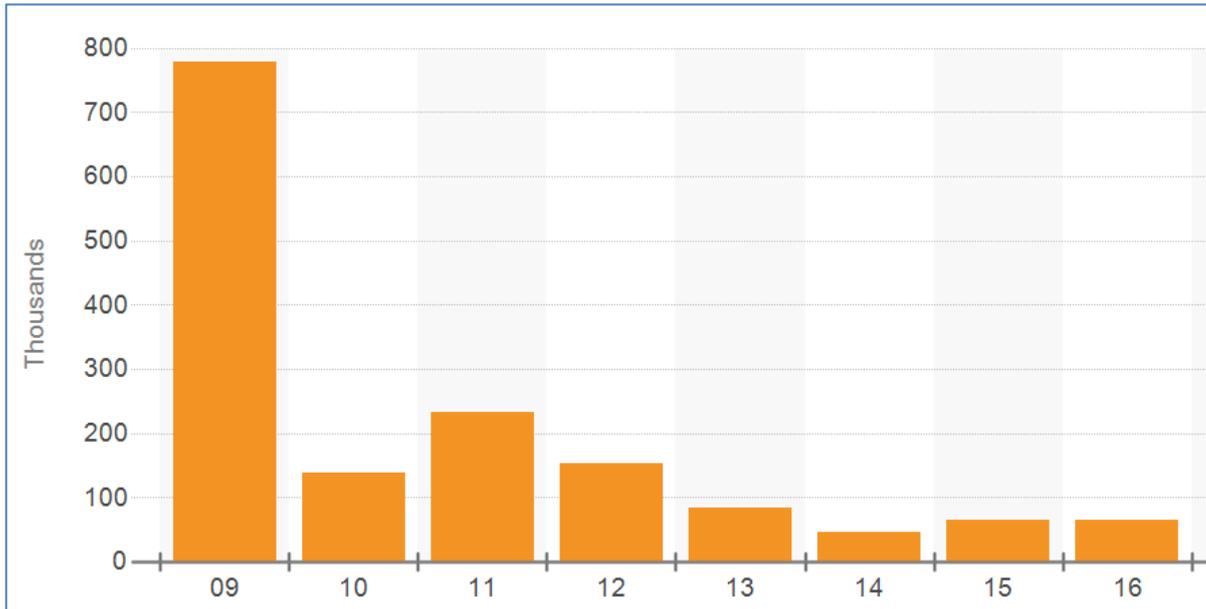
Figure 2: Industrial Vacancy and Availability Rate 2009-2016



Figure 3: Industrial Occupancy and Rents (£ per sq ft) 2009-2016



Figure 4: Industrial Vacant Floorspace (sq ft) 2009-2016



Appendix A5. Site Appraisals (excluding Mead Lane and Dicker Mill)

1: Foxholes Business Park, John Tate Road, Hertford

Owner: Various

Managing Agent: The Chase - Cushman and Wakefield – 0845 603 4450. Watermark Way – Jones Lang LaSalle 0121 643 6440, Harforde Court – Devonshire Developments 020 7722 1199. Remainder unknown.

EH 2007 Local Plan: HE8 Employment Areas: **In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses:** Foxholes West.

Halcrow 2008 Comments and Rating:

Foxholes Industrial Estate which is primarily made up of B1 offices scores highly in terms of quality of offering with its larger, newer units and visibility based on its positioning directly off the A414. Based on the market perception of local agents, it is considered the top ranking location in Hertford.

Assessment: Green

EHDC 2012 Comments and Rating:

Foxholes is described by one local agent as ‘the only business park in town’. Made up of businesses in John Tate Road, The Chase, Watermark Way and Harforde Court. Generally good quality units built circa 1990. Mostly B1 but some B2. Layout, access and parking generally good apart from congestion/overflow parking around the A414 junction linked to the Mercedes garage which detracts from the attractiveness of the estate. Rents of £15/ sq ft at The Chase reflect the market perception of this part of the estate. While a significant proportion of this development is currently vacant (at least 50%) it is understood that this is due to management/lease issues that are now being resolved and not the quality of the offer. Harforde Court also has good quality business units the majority of which are occupied. Agents suggest that the Foxholes estate could benefit from better signage from the A414 and a solution to the parking issues at the A414 junction.

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016:

Foxholes Business Park is a well maintained, reasonably modern estate with a range of B1-B8 occupiers. Vacancies are limited and the site is very active and busy. It has more prominence than some other estates in the area with access directly from the A414, although we agree with comments above that signage and visibility could be improved. At the time of visiting there were significant parking issues with on-street parking and over spill from the Mercedes Benz garage, often restricting the two way traffic on the estate to single file. The external areas of the site were well maintained and the units themselves are mostly modern and good quality. The Chase element of the estate still appears to have a number of vacant units.

Outstanding Planning Consents: None

Opportunities for Enhancement: Better signage from A414. There is an opportunity to remove the vehicle barrier between Foxholes /Caxton Hill although it is questionable the extent to which this would benefit Foxholes. Local authority action to improve vehicular access by controlling on street-parking/linking parking rights to the business occupiers.

Proposal: See Caxton Hill entry re vehicular Link to Caxton Hill.

Partners

Costs

Timeframe

Priority

Part 2. Occupiers @April 2016

<p>The Chase: (9 self-contained two storey detached/semi-detached campus-style office buildings. Head Lease held by Orange Holdings. Unit fronting the site (no assigned letter/number) occupied by 'IT luggage' Unit A Unitum Unit B Azelis Unit C1 – MPI C2 Continuum Insurance Brokers Unit C3 Vacant Unit C4 Evergood Associates Unit D vacant Unit E1/2 WSP Transport Engineers Unit F Vacant</p>	<p>John Tate Road: Lancaster Mercedes, Azelis Personal Care, Vtesse Cirus Services, Jewsons (at rear of the site) Ammerall Beltech Ltd, Vitesse Networks Telecoms, Fishpools Distribution Centre</p>
<p>Watermark Way: Tate House: 1st-3rd floors Blue Square Marketing; Ground Floor: Keymile Caxton House: 4-5 Vision (office automation) Ltd, Chaucer House:6,7,8,9 Vision (office automation) Ltd, Mercer House: 10 JMJ Accountancy; 11 Nationwide Network Services; 12 Lewis Patten; 13: K+S UK and Eire Ltd; 14, Abbots; 15 Nationwide Network Services (rear of unit 11); 16 Millbridge; 17 K+S UK & Eire Ltd; 18 Ground floor vacant; 1st floor. Agenda Recruiting.</p>	<p>Harforde Court: 1/2/3/4. Spacelabs Healthcare 5 Veratase 6. Lead Media 7/8 and 10 Enspire Health 9. Semicron innovation & service 11. Silent Sentinel 12. Custom Security Solutions 13. Occupied but no signage 14. Vacant 15. nfs hospitality</p>

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Currently still a number of vacancies in The Chase but the remainder of the site is well occupied
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Good accessibility but parking appears to be an issue with significant overspill on to the estate's internal roads
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes – except for the Mercedes Garage		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes although signage good be enhanced	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

2. Caxton Hill, Hertford

Owner: Various

Managing Agent: Hertford Industrial Estate – Jones Lang LaSalle – rest unknown

EH 2007 Local Plan: **HE8 Employment Areas: In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses:** Caxton Hill/Ware Road.

Halcrow 2008 Comments and Rating:

Caxton Hill is an older traditional estate primarily offering small warehouse units, with the quality of its stock being relatively poor. It scores poorly in terms of visibility as it is not accessible via the A414 and there are some adjacent residential properties backing onto the estate causing potential use conflicts. The estate seems to have poor flexibility and some vacant units. It should be considered for release over the planning period provided that a better quality new site can be allocated for employment use.

Assessment: Red

EHDC 2012 Comments and Rating:

The estate comprises two main areas – the northern part comprising the modern print works of Stephen Austin, the extensive premises occupied by Fluorocarbon and various smaller industrial premises in Caxton Road and Extension Road, some of which are vacant and most of which are of poor quality. The remainder of the estate comprises the Hertford Industrial Estate consisting of mainly single storey brick warehouse units of poor to average quality worth around £4 - £5 ft sq, a number of which are vacant.

Access to the whole estate is from Ware Road resulting in industrial and employee traffic having to pass through Hertford. There are long standing proposals to open access from John Tate Road on the adjoining Foxholes Estate and close the Caxton Hill access to non-emergency vehicles. While this could encourage redevelopment of at least the Hertford Industrial Estate for new B1 units (as an extension to Foxholes) the difficulties in securing land owner agreement should not be underestimated. In the longer term, the older industrial properties at the northern end of Caxton Hill could be redeveloped for residential purposes with alternative employment provision being provided on Mead Lane.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics 2016 Comments and Rating:

Wessex Economics agrees with the general description provided by EHDC above and in addition note the following: the site in general is poorly maintained (this includes the Fluorocarbon area but excludes Stephen Austin), with a lack of amenity, poor signage both externally and internally within the site, poor condition external areas and internal roads. The units themselves are clearly old and again not particularly well maintained and lack the presence, visibility and amenity that might attract higher value occupiers. The access to the site via Ware Road seems inadequate, particularly for large lorries often accessing the estate. Access from John Tate Road has still not been secured. In spite of these issues, the site appears active although there are a number of vacancies.

This Hertford Industrial Estate site is now the subject of pre-application discussions surrounding a change of use to residential. According to a recent survey of the site undertaken by Boyer, it covers an area of 30.6 ha and comprises 12,740 sq m of B1c space across 7 units ranging from 150-700 sq m and three larger units of over 1,000 sq m. 47% (13) of units are vacant. Parking provision is inadequate and provision is approximated as 42% below modern standards. Tenants currently pay rents that are below market levels.

Outstanding Planning Consents:

Opportunities for Enhancement: Alternative access route via Foxholes Business Park, improved maintenance of external areas and refurbishment of units, subject to viability and market demand.

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

Caxton Hill	
Stephen Austin Printers	Fluorcarbon - PTFE & Polymer manufacture/distributors
	Wordwide Recovery Systems – vehicle engineers
Extension Road	
Hertford Offset Printers (Graphic House)	RePlas – plastic injection moulding
Hertford Industrial Estate	
1/2. FJE Plastic Mouldings	3. Marble Granite/Studio 3 Kitchens
4. Vacant	5. Vacant
6. HDM The Halycon Group - classic goggles & accessories	7. Designer Woods Doors
8. Vacant	9. Toilets Plus Ltd
10a Vacant	11. Bottom Line Technologies – document processing systems
12. Scene2 Ltd	18 Vacant
14 Gannons Mercs and Prestige	15 Vacant
16/17 Autoboss	19. Marble Classic Ltd
20/21 Dicker Mill Coachworks	22/23 Enterprise Rent-a Car
24/25. Caxton Hill Motors	26/27 Turnford Body Repair Centre
28/29 AM Printers (soon to be vacating)	30/31 VTS Steel Fabricators (Boyer report = Vacant)
32/33 Jon Pac Food packaging (Boyer Report = Vacant)	34/35 to let (Boyer Report says Fortress Security Systems)

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Around one third of the units are vacant, including a number of larger units to the rear of the site.
3. What is the quality of the land like?	Average to poor	4. Good accessibility/parking?	Inadequate access, particularly for HGVs, poor circulation and inadequate levels of parking
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	Some conflict along boundaries
Does the estate have good accessibility and parking provision	No		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes, there has been some turnover of tenants in recent years suggesting it has some appeal but this is likely to be limited	Is the estate in a good position?	Yes within Hertford and the wider transport network, but the access issues limit the extent to which it can benefit from its location
Is the estate visible	No	Is the estate flexible?	No
Is the general quality of the environment good?	No, units and external areas are poorly maintained and there is no amenity	Is there any conflict with adjacent uses?	Yes
Is the market perception positive?	No		

3. Estate: Hartham Lane, Hertford (Great Northern Works)

Owner: Ekins, Gt. Northern Works, Hartham Lane, Hertford

Managing Agent: as above

EH 2007 Local Plan: HE8 Employment Areas: **In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses:** Hartham Lane/Station Approach.

Halcrow 2008 Comments and Rating:

This estate benefits from above average quality of buildings, good parking provision and flexibility. There appears to be good demand, especially from smaller occupiers. The site also scores well in terms of sustainability. Its relative proximity to the centre of Hertford means that it achieves a good score on its proximity to a train station and facilities, factors perceived highly by some occupiers as they can assist in attracting and retaining staff.

Assessment: **Green**

EHDC 2012 Comments and Rating:

Halcrow comments still apply. Estate fully occupied suggesting strong demand. Not clear whether Halcrow 2008 included McMullens Brewery within this area but part recently redeveloped as a Sainsbury's supermarket.

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016:

Halcrow and EHDC comments apply. The site is well occupied and in a good location with proximity to local amenity. At the time of the visit a small part of the site looks to have been cleared and is currently being used as open storage but it is was not clear by whom. There have been some changes to occupiers since the previous review as noted below.

Outstanding Planning Consents:

Opportunities for Enhancement:

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

Great Northern Works	
Ekins & Co Builders	Windowman Glazing showroom
Unit 2 Adora Group (also unit 2)	LD Engineering
TAG Distribution	
Rock Plastics	
Unit 7 Rothschild & Bickel Glass Merchants	
Hartham View Industrial Estate	Units 10-18 Mobile Stationary & Printing
Unit 14 Logic RC – games distributors	McMullens Brewery

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Strong demand/no vacancies
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Good
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

4. Estate : Pegs Lane, Hertford SG13 8EQ

Owner: Various

Managing Agent:

EH 2007 Local Plan: No allocation

Halcrow 2008 Comments and Rating:

This cluster includes a number of good quality office buildings with occupiers ranging from East Herts District Council and Hertfordshire County Council to the Police. The cluster benefits from its central location in Hertford and is expected to maintain strong demand for B1 use in the future. It scores well across all qualitative categories. **Assessment: Green.**

EHDC 2012 Comments and Rating:

This cluster has not fared well in comparison with 2008. Bentley House on Pegs Lane is vacant as is Sovereign House, the former government building and the adjoining Elbert Wurlings pub. The government building particularly is unlikely to be re-occupied and together they would form a useful redevelopment site. While the local authority buildings are of reasonable quality, they and Bentley House (mostly vacant but subject to an application for change of use to a care home) are not flexible and do not lend themselves readily to alternative uses. For the LA buildings, this however is academic in the foreseeable future. Nevertheless, the central location is valuable and the site should be retained predominantly for employment use although an element of residential development may be necessary to kick start a scheme.

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016:

This area benefits from its central location. However, aside from the local authority buildings the site is now mainly in non-B use class employment uses. Bentley House is now a Care Home, whilst sites to the south of Pegs Lane have now been redeveloped for residential uses or are vacant and/or in the process of being demolished and likely to be redeveloped for residential use, unless EHDC can demonstrate a 5 year supply of housing land.

Outstanding Planning Consents: None

Opportunities for Enhancement: Redevelopment of former IR building and adjoining PH

Proposal:

Partners

Costs

Timeframe

Priority

Part 2. Occupiers @January 2013

Wallfields - East Herts District Council	County Hall - Hertfordshire County Council
Gates Ford Dealer	Herts Police (Mercury House)
Various in new offices	Sovereign House –vacant- now demolished
Elbert Wurlings PH (vacant)	Bentley House – Care Home

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Significant vacancies
3. What is the quality of the land like?	Generally good	4. Good accessibility/parking?	Yes
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	No
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

5. Mimram Road, Hertford, SG14 1MM

Owner: Jill Parry, 07887 877640

Managing Agent: as above

EH 2007 Local Plan: HE8 Employment Areas: In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses: Mimram Road.

Halcrow 2008 Comments and Rating:

This estate has mostly average qualitative characteristics. It offers relatively small units appealing to local occupiers and in that sense fulfils an important local function. It included a number of B2 units that could be considered for B1 redevelopment if B2 demand declines

Assessment: Amber

EHDC 2012 Comments and Rating:

Assessment: As Halcrow. The estate functions well and vacancy rate is low. But it would benefit from improved signage from the A414, an issue raised by several occupiers. They also suggest that the owner is reluctant to invest in improvements. Unit 3 currently available for £4 sq ft.

Assessment: Green

See Appraisal Criteria below

Wessex Economics April 2016:

The estate comprises a mix of average to low quality units with some in fairly poor condition and un-maintained external areas. Parking appears inadequate with lots of on-street spill over parking causing congestion and limited turning opportunities for larger vehicles. To the rear of the estate is a gated/fenced off section and it was not immediately clear if these businesses were open to the public or not. Many of the units have old/out of date signage making it difficult to ascertain current occupiers. Although there were no advertised vacancies at the time of visit a number of the units looked empty and/or underutilised. Many of the units are occupied by sui generis uses such as car wash and MOT centres.

Access to the estate is reasonable although you can only access by car via one side of the of the A414 (if travelling towards Hertford you have to go past the estate and make a full turn at the roundabout in order to access)

Outstanding Planning Consents: None

Opportunities for Enhancement: Better signage from A414

Proposal: Improved signage

Partners

Costs

Timeframe

Priority

Part 2. Occupiers @ April 2016

Priory House – Smart Merchants Electrical Wholesalers	151. Hertingforbury Road, James Stuart Creative Print Administration
1. Mimram Service Centre/Crossfit Gym B1/Sui Generis	2. ND Aquatics – aquarium manufacturers B2
3. Mix display solutions	8. Units looked empty/inactive
10. Carwash & Hammonds Engineers	12. Sierra Leone Clothing Ltd. Import/export/sale of clothing/leather goods B8 – Units looked inactive at time of visit
14. County Fireplaces – fireplace suppliers B8; 14B: Grooming Maite	16. LED lightworld – lighting/heating suppliers
18. Graphic Nature Recording Studio/Garden Supplies and Logs & Coal SG/A1	Replas House: Injection Moulding

Part 3– Appraisal Criteria**Estate Appraisal Criteria 1: Fitness for purpose**

1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Good/low advertised vacancy rate but suspect that a number of units are inactive and underutilised
3. What is the quality of the land like?	Average	4. Good accessibility/parking?	Reasonable access from road network although no right turn from the A414 onto the estate. Parking also appears inadequate with lots of on-street spill over parking causing congesting and turning issues on the estate.

Estate Appraisal Criteria 2: Sustainability

Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Average		

Estate Appraisal Criteria 3: Marketability

Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes, although could benefit from better signage	Is the estate flexible?	Yes
Is the general quality of the environment good?	Average	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Average		

6. Taylor Trading Estate, Ware Road, Hertford

Owner: Not known

Managing Agent: Withers Thomas; Tel: 01920 469211

EH 2007 Local Plan: No allocation

Halcrow 2008 Comments and Rating:

This estate has mostly average qualitative characteristics. Approximately one third of the units were vacant at the time of the survey. Refurbishment and improved marketing should be considered to make the estate more attractive. The vacancy rate will need to be monitored and if it remains high, the site should be considered for B1 development.

Assessment: Amber

EHDC 2012 Comments and Rating:

Estate comprises Ware Garages Renault dealer, SAM autocentre and a number of poor quality industrial units at the rear. A further part of the estate to the west has been cleared and boarded and planning permission granted for residential development and a vets surgery (the justification for loss of employment land). Should the garage close redevelopment of the remaining part of the estate for residential (with an element of employment) may be difficult to resist.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics Comments April 2016:

The estate, situated on the edge of a residential area, is fairly low quality with old/tired units, very poor parking and turning room but good visibility from the road network. The vacant/boarded up parcel of land has not progressed since the 2012 review. There have been some changes to occupiers (as noted below). Overall the estate is poor quality and inefficient but still being utilised to fulfil local occupier needs with limited vacancies. We understand that Sam autocentre has 5 years remaining on its lease and questions have been raised regarding the future of the site if there lease is not extended.

Outstanding Planning Consents: Residential/vets surgery on western part of the estate.

Opportunities for Enhancement:

Proposal:	Partners	Costs	Timeframe	Priority

Part 2. Occupiers @April 2016

1. SAM Centre – car parts (312 Ware Road) – now called Lloyds Motor Spares	Ware Garages, 356-364 Ware Road – Ware garages is now at the rear of the estate in units 6 & 8 and includes a car wash
3/3a. RoyCarter Repairs	4. Bentley Calor Sales
4a. Lulu coffee roaster	5. MS Installations/Absolute Windows
5a. Vacant/no sign	Unit 2: APC Tyres
7. Hand wash (car)/Hi-Q Tyre Services	

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancies
3. What is the quality of the land like?	Average to poor	4. Good accessibility/parking?	Good access but parking difficult
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	Not at present
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	No	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	No
Is the general quality of the environment good?	Average	Is there any conflict with adjacent uses?	Not at present
Is the market perception positive?	No		

7. Warehams Lane, Hertford

Owner: Not known

Managing Agent: Not known

EH 2007 Local Plan: HE8 Employment Areas: **In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses: Warehams Lane.**

Halcrow 2008 Comments and Rating:

This estate has a mixed qualitative profile ranging from poor to good. It appears to have no major conflicts with adjacent land uses however and some flexibility making it a potential candidate for B1 redevelopment.

Assessment: **Amber**

EHDC 2012 Comments and Rating:

As for Halcrow – an estate of great contrasts from a scrapyard and open builder storage to modern industrial units and Which offices/laboratory. But fully occupied and clearly serving a local need.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics Comments April 2016:

As with Mimram Road, the estate is in a good location off the A414 but with access from only one side of the A414 (no right turn in to the estate). The estate is completely occupied with a mix of open storage, vehicle sales and hire and office/laboratory occupiers with units/plots ranging from good quality to low quality but still suitable for occupier needs.

Outstanding Planning Consents:

Opportunities for Enhancement:

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

1. Plot of land leased by MRH for car parking	2. Budget Tyres
3. Euro Fleet Sales	4. Now used as Open Storage leased by a private individual
5. Contract Scaffolding/Vands Scaffolding	6. Henry's of Hertford Agricultural & Automotive contractors and distributors
7. Hertford Craft Centre/Pinflair	8. MRH Hertford
9. Hertford Craft Centre/Pinflair	12. Cooks Yard (vintage car restorer)

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Strong demand
3. What is the quality of the land like?	Varies – good to average	4. Good accessibility/parking?	Yes, although access from A414 restricted to west bound traffic
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Good to average	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

8. Broadmeads Estate, Ware

Owner: Not known

Managing Agent: Not known

EH 2007 Local Plan: WA8 Employment Areas **In accordance with the Policy EDE1 the following sites are defined as Employment Areas on the proposals map and will be reserved for industry, comprising Classes B1 and B2 General Industrial Uses:** Broadmeads

Halcrow 2008 Comments and Rating:

This estate is fully occupied with modern buildings of high quality. Some difficulties are acknowledged with regard to access. However its relative proximity to the centre of Ware means that it achieves a good score on its proximity to a train station and facilities, factors perceived highly by some occupiers as they can assist in attracting and retaining staff. Furthermore, the buildings appear capable of being altered and re-used should their current use become obsolete.

Assessment: **Green**

EHDC 2012 Comments and Rating:

As per Halcrow. Single occupier, good quality buildings/site

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016:

The site is still in single occupation with good quality buildings/site. Its location next to the train station and town centre of Ware provide good access and amenity for workers. However, road access is fairly constrained for larger vehicles by the small network of roads and surrounding residential area. If the current occupier were to vacate, WEc take the view that the site would be more suited to a mix of small business and workshop units, potentially with some residential to cross-subsidise.

Outstanding Planning Consents:

Opportunities for Enhancement: None

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

Farecla – surface finishings – HQ office and distribution

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose

1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Fully occupied
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Yes

Estate Appraisal Criteria 2: Sustainability

Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability

Is the estate marketable?	Yes	Is the estate in a good position?	Average
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

9. Ermine Point/Gentleman's Field, Ware				
Owner: Not known				
Managing Agent: Not known				
EH 2007 Local Plan: OSV7 Employment Areas In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be reserved for industry comprising Classes B1 Business and B2 General Industrial Uses, subject to sub-section (II) of this policy; and, where well related to the transport network, B8 Storage and Distribution				
Uses: Ermine Point Business Park, Nr. Ware.				
Halcrow 2008 Comments and Rating: Ermine Point Business Park and Gentleman's Field consist of standardised small scale warehouse/office units. Its position adjacent to the A10 enhances its visibility and general market perception although it is rather average in terms of attractiveness. The general quality of the estate is generally high and its standardised smaller units are appealing to locally-based small occupiers. It is recommended that it is safeguarded for employment use. Assessment: Green		EHDC 2012 Comments and Rating: As for Halcrow. One unit vacant in January 2013. Estate works well enough although parking along the access road suggests that provision is inadequate on some units Assessment: Green See Appraisal Criteria below		
Wessex Economics Comments April 2016: The estate is well located and benefits from being adjacent to the A10 and therefore has good visibility. On the whole the units are average to good quality and well occupied and the estate as a whole is very active. However, there is significant overspill of parking on-street causing on-site congestion and turning issues and the external areas/overall appearance of the estate could be enhanced with better maintenance. There has been some change in tenancies as noted below.				
Outstanding Planning Consents: None				
Opportunities for Enhancement: None				
Proposal:	Partners	Costs	Timeframe	Priority

Part 2. Occupiers @April 2016	
1. Viero UK & Fould Solicitors	2. Vacant
3. Mtec	4. Digital Monkey printing & Graphics/Flair Graphics + Harringtons on ground floor
5. Harringtons Architectural Metal Work	6. Macro Engineering
7. MC Property/Plumbing Bathroom Showroom).	8. MTEC Warehousing Ltd
9. MC Property/Plumbing Bathroom Showroom).	10/11/12. Yard and adjoining block – MTEC Freight Co – road haulage
13 Leary Brothers Building Contactor	14. Hertford Controls electronic components
5-17. High Oak Business Centre	

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancy
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Yes –see comments above
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes – but some parking on access road		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

10. Crane Mead and Crane Mead Business Park

Owner: Not known

Managing Agent: Not known

EH 2007 Local Plan: WA7 Crane Mead: I. The Crane Mead site is defined as an Employment Area on the Proposals Map and will be primarily reserved for industry comprising class B1. II. The council is anxious to secure the provision of a second means of vehicular access to the Crane Mead area from Station Road, passing under Viaduct Road, and will use appropriate measures to facilitate this. III. The Council will continue to support the efforts of British Waterways to secure the implementation of a new road bridge linking Crane Mead to the north side of the Lee Navigation in order to facilitate the implementation of the proposed Country Park.

WA8 Employment Areas: In accordance with the Policy EDE1, the following sites are defined as Employment Areas on the proposals map and will be reserved for industry, comprising Classes B1 and B2 General Industrial use: **Crane Mead.**

Halcrow 2008 Comments and Rating:

The cluster of estates made up of properties on Marsh Lane and Crane Mead Business Park scores well in terms of sustainability because of its proximity to the centre of Ware and the train station. The fact that the cluster is made up of a range of different quality stock, with some partially derelict units found on Marsh Lane subtracts from the general quality of the environment. There is potential for a better quality offering but the areas low level visibility and access points means the overall market perception is low.

Assessment: Amber

EHDC 2012 Comments and Rating:

The area comprises the large industrial building, Swains Mill, Magog Industries and a free-standing office building, Mill Studios on the northern side of Crane Mead together with Crane Mead Business Park, a modern development of business units to the south (Unit 13 currently available for £5 ftsq) and a car park. Crane Mead Business Park, built in 2002, offers good quality units with good access/parking and low vacancy rates. The Swains Mill site was considered for a new food store which has now been approved on the Cintel Site.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics Comments April 2016:

On the whole the estate is good quality, well occupied and functions very well and is occupied by some higher value occupiers compared to some other estates in the area. However, it lacks visibility and signage with nothing to indicate there is a business estate from either direction of approach by road. The estate is lined by residential units and without any signage one would assume it was a residential estate. Crane Mead Business Park is good quality and well occupied with good parking and an efficient layout. There have been some changes in tenancies since the previous review and vacancies have reduced.

Outstanding Planning Consents:

Opportunities for Enhancement:

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2 – Occupiers @April 2016

Crane Mead	Mill Studios
Swains Mill accommodates a number of small businesses not particularly evident from outside the building including B1, B2 and B8 uses. The main one is Auto Hub on the ground floor fronting the river and also occupying a site opposite which is used for parking/vehicle storage.	Mill Studios contains a number of mainly B1 occupiers in small office suites.
Magog Industries 10 Crane Mead – Precision Engineers	
Crane Mead Business Park	
1. Chariot Office Automation B1	2. Timber Connection/Physical Rehab Centre B8/SG
3. The Probate Bureau – B1	4-6. Rapier Design Group
1. Kingfisher Environmental Services; 8. Woodlands kitchens	9-10 Beaver Group – digital design B1
11-12. JPM Products (Education/medical products) B8	13. BTS Laundry Services
14. ACO Packaging – bottling machinery B2	15. Flare Digital Graphics
16. Compass Braille – Braille Charity – B1	17-20. Ware Heating and Bathroom Supplies B8

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancy rate
3. What is the quality of the land like?	Average to good	4. Good accessibility/parking?	Yes
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	No	Is the estate flexible?	Yes
Is the general quality of the environment good?	Average to good	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes for Crane Mead Business Park		

11. Marsh Lane, Ware

Owner: Not known

Managing Agent: Not known

EH 2007 Local Plan: EDE1. Employment Areas: WA8 Employment Areas: In accordance with the Policy EDE1 the following sites are defined as Employment Areas on the proposals map and will be reserved for industry, comprising Classes B1 and B2 General Industrial Uses: 1. **Land off Marsh Lane**

Halcrow 2008 Comments and Rating:

The cluster of estates made up of properties on Marsh Lane and Crane Mead Business Park scores well in terms of sustainability because of its proximity to the centre of Ware and the train station. The fact that the cluster is made up of a range of different quality stock, with some partially derelict units found on Marsh Lane subtracts from the general quality of the environment. There is potential for a better quality offering but the areas low level visibility and access points means the overall market perception is low.

EHDC 2012 Comments and Rating:

Marsh Lane contains a mixture of open yards, older industrial premises and a modern B1 development, the Peerglow Centre. A further 0.87 ha (2.14 acres) is currently on offer from Davies & Co. The current vacancy rate is low and comments of sustainability credentials, market perception and visibility made by Halcrow remain relevant. Nevertheless, the area appears to perform a useful function and has a low vacancy rate. Progressive redevelopment for B1 should be encouraged.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics April 2016:

As with Crane Mead, this estate suffers from lack of signage and visibility. However, the recent addition of a Premier Inn which now fronts the site has given it greater prominence. The estate comprises a real mix of large poor quality and old B1c and B2 units together with slightly more modern and better quality B1a and B1c units. Vacancies appear to be fairly limited and the estate is very active, however, a number of the larger, poor quality units look to be under-utilised and may benefit from refurbishment/sub division to suit smaller occupiers.

Outstanding Planning Consents:

Opportunities for Enhancement:

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

HCC Marsh Lane Day Centre - Services for young people	Welding Engineers
Premier Inn	Morley Stoves and fireplaces
EFF European Flavours and Fragrances	David Head and Sons builders equipment/containers yard
PW Windsor/ the Windsor yard	Ware Royal Mail Delivery Office
Plumb Centre	Arriva bus depot
Smartwax/ Brewers paint supplier & G&G Landrover specialists (MOT)	PJ Roofing Contractors
Turnford Pipelines	Ware roofing supplies, sleepers, decking
Howe Green Steel Fabrications	Hanson Ready Mix plant
Pallet Yard	Blakeley Electrics, (Ware works)
Leeside Turned Parts	DWW to let
Shove turned parts (precision turned parts)	Makevale Ltd, Valley House
Spirex metal products	Hertstorage household storage
Old Charm Showroom/Wood Bros, Furniture Showroom & Works	
Peerglow Centre small business units: 1 & 9. European Flavours and fragrances, 2 & 3 & 8 Solar Plicity, 4 Palmer Woods Building Projects, 5 DEP Construction Services 6. Direct Approach, 7 Web Site design,	Bespoke Performance Mobil I

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancy
3. What is the quality of the land like?	Poor to average	4. Good accessibility/parking?	Yes although some on street parking
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	No	Is the estate flexible?	No
Is the general quality of the environment good?	No	Is there any conflict with adjacent uses?	No
Is the market perception positive?	No		

12. Windsor Industrial Estate, 424 Ware Road, Ware, SG13 7EW

Owner: Not known

Managing Agent: Not known

EH 2007 Local Plan: HE8 Employment Areas: **In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses:** Windsor Industrial Estate, Ware Road.

Halcrow 2008 Comments and Rating:

The estate scores highly in terms of visibility although the overall quality and range of its stock are mostly average. Its location and high occupancy rate are strong points for its safeguarding for employment use.

Assessment: **Green**

EHDC 2012 Comments and Rating:

As per Halcrow – estate fully let January 2013

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016

As per EHDC comments, the estate is fully let with no changes to tenancy since 2013.

Outstanding Planning Consents: None

Opportunities for Enhancement: None

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

1. Flyers Group	2. Heating and Bathroom Supplies B8
3. Nicky Cornel Furniture	4. STS Tyres
5. Halfords Autocentre	

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose

1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Fully let
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Yes

Estate Appraisal Criteria 2: Sustainability

Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability

Is the estate marketable?	Yes	Is the estate in a good position?	Yes for local demand, no for access to strategic road network
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

Estate 13: Star Street/Widbury Hill

Owner: N/K

Managing Agent: N/K

EH 2007 Local Plan:

Halcrow 2008 Comments and Rating:

n/a

EHDC 2012 Comments and Rating:

n/a

This area was originally assessed as Widbury Hill but no reference was made to Star Street

Assessment:

See Appraisal Criteria below

Wessex Economics Comments April 2016:

Star Street employment site is situated on the western edge of Ware town centre and used to be part of the larger Widbury Hill site (which has changed use to residential). It consists of four single storey units, three of which are occupied and the fourth vacant due to a recently deceased owner. At this point in time it is not possible to determine when/if the fourth unit will be marketed. The site is bound by the River Lea and residential properties together with a public house. Access to the site is via Star Street (B1004) which continues into Ware town centre and can be busy at peak traffic times. Parking on site is adequate although slightly compromised by the Star Street garage which spills over into other areas of the site. Overall the site is of average quality with the premises beginning to tire and require some maintenance but still functional for their current purpose. Overall it is well occupied and functioning well as an employment site. The site is visible and close to the town centre of Ware making it attractive in terms of proximity to transport and amenity.

Outstanding Planning Consents:

Opportunities for Enhancement:

Proposal:

Partners

Costs

Timeframe

Priority

Part 2. Occupiers April 2016

Star Street/Widbury Hill-	
The Angels Group- Children Day Nurseries (Offices)	01920 486487
Jon Applegate Photography	01920 467327
Star Street Garage	01920 487176
Vacant	

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	1 Vacancy
3. What is the quality of the land like?	Average	4. Good accessibility/parking?	Average
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Reasonable access but parking compromised by spill over from garage		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Average
Is the estate visible	Yes	Is the estate flexible?	Not in its current form
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	N/A		

Appendix A6. Site Appraisals for Mead Lane and Dicker Mill

MEAD LANE AREA:

The area of employment land best known as Mead Lane (together with the Dicker Mill complex to the north of the river) represents a major employment area in Hertford. For the purpose of this review, Wessex Economics have maintained the breakdown of areas within Mead Lane as assessed by EHDC in 2012 as follows:

- a) Marshgate Drive both south and north of the river
- b) Merchant Drive/Fountains Drive
- c) Mead Lane Business Centre
- d) Centros, Mead Lane
- e) The Lockhouse Industrial Estate and adjoining land
- f) Conbar House, Expo House, Orland House and Chelsing House served directly off Mead Lane
- g) Dicker Mill to the north of the Mead Lane Area is included in these site assessment since it is functionally part of the area.

Access to the whole of the Mead Lane area is via Mill Road. Mead Lane itself is used for on street parking by local occupiers fronting the road. This results in two way traffic being restricted to single vehicle width. Further details on accessibility are reported under each separate schedule.

14a. Estate: Marshgate Drive, Hertford, (Mead Lane)

Owner: Various

Managing Agent: Not known

EH 2007 Local Plan: HE5 Mead Lane Area West of Marshgate Drive; Favourable consideration will be given to the redevelopment of the Mead Lane Area, west of Marshgate Drive, as defined on the Proposals Map, for residential purposes. The development of the site shall make provision for up to 40% affordable housing, in accordance with Policies HSG3 and HSG4. HE8 Employment Areas: In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses: **Mead Lane (East of Marshgate Drive).**

Halcrow 2008 Comments and Rating:

Marshgate Drive

This estate is well occupied (one vacancy was recorded at the time of the survey) but its overall qualitative score ranges from poor to good. Given that most units are currently in manufacturing use, the estate would be a good candidate for redevelopment to B1 if demand for B2 units declines (as projected by the employment forecasts).

Assessment: Amber.

EHDC 2012 Comments and Rating:

Land on the west side of Marshgate Drive has been redeveloped for or has permission for residential redevelopment (former TXU site and Marshall Panelcraft.). To the east there is a vacant site at the junction of Mead Lane, a 1.48ha vacant site (former laboratories/yards) adjoining Norbury's Builders Yard and to the north, the vacant National Grid land. North of the river there are modern Industrial Units 6-11 Marshgate Drive.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics Comments April 2016:

WEc have limited additional comments to make from the EHDC 2012 comments above; the situation remains largely the same. The modern units to the north of the river are well occupied but access is very poor for commercial/industrial vehicles.

Outstanding Planning Consents:

Opportunities for Enhancement: Opportunity for redevelopment of vacant land once Mead Lane access issues resolved.

Part 2. Occupiers @April 2016

South of River, West of Marshgate Drive	South of River, east of Marshgate Drive
Unit 3, Marshall Panelcraft – car repairs	Norbury's Fencing/building materials
Unit 7. Bridge Networks	Vacant site , at junction of Marshgate Drive and Mead lane
North of river - new business units	Former laboratory and land 0.60 ha (1.48 acres) adjoining Norbury's – currently marketed by Derrick Wade & Waters
Units 6-8 Emco Group – lighting suppliers B8	Hertford Gas Holder Station between Norbury's and canal. Registered is a NIHHS (hazardous) site.
Unit 11. Chapman Bespoke Woodwork	Unit 3. Neocell skincare products
Unit 2 and 4. Film Light	Unit 8. Crossbrook Furniture

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	No	2. What is the demand/vacancy rate?	Mainly vacant
3. What is the quality of the land like?	Poor/contaminated	4. Good accessibility/parking?	No
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	No	Is there conflict with adjacent uses?	Yes – residential in Marshgate Drive
Does the estate have good accessibility and parking provision	No		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	If access resolved	Is the estate in a good position?	Yes
Is the estate visible	No	Is the estate flexible?	Not applicable.
Is the general quality of the environment good?	No	Is there any conflict with adjacent uses?	Residential in Marshgate Drive
Is the market perception positive?	No		

14b. Estate: Merchant Drive/Fountains Drive, Hertford, SG13 7BH

Owner: Not known.

Managing Agent: Merchant Drive (west side) – Mead Lane Industrial Estate - managed by DTZ 0845 603 1485. Merchant Drive (east side) managed by Kenningtons 202 7224 2222.

EH 2007 Local Plan: HE8 Employment Areas In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses: Mead Lane (East of Marshgate Drive).

Halcrow 2008 Comments and Rating:

This estate appears to have some vacant units and overall average characteristics. As for Marshgate Drive it should be considered for B1 redevelopment if demand for B2 declines and vacancies persist.

Assessment: Amber

EHDC 2012 Comments and Rating:

Good quality development but shares access constraints with the rest of the Mead Lane area

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments, April 2016

Reasonably good quality estate, well maintained and very active with currently limited vacancies (reduced since review in 2012) but suffers from poor access associated with Mead Lane and significant on-street parking suggesting inadequate parking levels for current uses.

Outstanding Planning Consents: None

Opportunities for Enhancement: Improved access

Proposal:	Partners	Costs	Timeframe	Priority

Part 2. Occupiers @April 2016

Merchant Drive (west)	
1. To Let	2. Neptune Engineering – injection moulding tools – B2
3. Hertford Autocentre	4. High Line Autos – vehicle servicing
5-8 Huco Engineering – precision engineers	9. Rock & Co
10. PJ Pipes and Valves – valve manufacture and distribution	11 and 12 . 4 Aces Ltd – supply/distribution of liquid packaging materials
Merchant Drive (east)	
13. Kuehne & Nagel – logistics	14 Old English Tiles – tile stockist/supplier
15. Ltd Printers	16. G.W Cowler precision Engineers
17. Howden Joinery – wood joinery depot – B8	18/19. Qualiturn products – precision engineers
20. GE Transportation – transport engineers	21. Transport & Signage Solutions
Fountain Drive	
Unit 3. Speed Alloys – alloy suppliers	Regal Printing – printers and printing supplies
Astute Electronics – electronic components – B1, B2, B8	10/11 Centurion
Unit 1. Pope & Meads Engineers – precision engineers	Unit 6. Air Energy – Compressed air products
Unit 5. John Hart Flooring – carpet & flooring suppliers	Unit 4, Harris Performance Products – motorcycle products and parts – B2/B8
Unit 12. Vacant	Units 8 &9: Astutue

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancies
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Constrained by Mead Lane and on-street parking spill over suggests inadequate levels of parking
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Constrained by Mead Lane and on-street parking spill over suggests inadequate levels of parking		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

14c: Estate: Mead Lane Business Centre

Owner: Mead Lane Business Centre Management

Managing Agent: Mead Management Business Centre Management Ltd Unit 14.

EH 2007 Local Plan: HE8 Employment Areas In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses: Mead Lane (East of Marshgate Drive).

Halcrow 2008 Comments and Rating:

Not clear how Halcrow dealt with the various elements of Mead Lane in 2008

EHDC 2012 Comments and Rating:

This area comprises business units fronting Mead Lane between Marshgate Drive and Conbar House and lying to the rear of Conbar House and Orland House. The buildings are of good quality and the layout spacious and the majority are in use.

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016:

Wessex Economics agrees with EHDC comments from 2012 and has no additional comments to make. Occupiers list has been updated as necessary (see below).

Outstanding Planning Consents: None

Opportunities for Enhancement: Access

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers April 2016

Fronting Mead Lane – two storey brick industrial units	
Units 1/2 PADS printing/stationary	Units 3/4 Watergel Technologies
Unit 5 Business Card Co. Ltd	
To rear: 7. Small Electrical Data	8. LG Bland Electrical/Tindall Property Services
9. D+L Medical Gasses	10. MD Electrical
11. FJE Plastic Developments	12. Jamieson Press
13. Adapta Clothing	14. Herts & Essex Printers
15 RES On-line Solutions	16. H&E Digital/Linards Ltd
17. RS Taylor	18. Vacant
19/20. The Fine Confectionary Company Ltd	21. Fumair Ltd
22. Neil Display	23. The Fine Confectionary Company Ltd
24. JKL Solutions	25. EME Electronics

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancy
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Yes
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes – but general comments on access to the Mead Lane area apply
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

14d: Estate: Centrus, Mead Lane, Hertford

Owner: TRE Hertford 01962 843211

Managing Agent: Lambert Smith Hampton 01727 834234

EH 2007 Local Plan: HE8 Employment Areas: In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial uses: **Mead Lane (East of Marshgate Drive).**

Halcrow 2008 Comments and Rating:

Not clear how Halcrow dealt with the various elements of Mead Lane in 2008

EHDC 2012 Comments and Rating:

Vacant site in 2008. Modern business units built within the last 5 years. Good quality environment but shares the access issues with the rest of Mead Lane

Assessment: Green

See Appraisal Criteria below

Wessex Economics Comments April 2016:

Good quality, modern business units and well maintained external areas. Access issues are constrained associated with Meads Lane. Small number of vacant units.

Outstanding Planning Consents: None

Opportunities for Enhancement: Improved access to whole of Mead Lane area

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

1. Nimbus Housing	2. PDC Ltd - Debt Collection Agency
3: McHale Ward & Rosie Robins; 4: Reach Active	5/6. FT Solutions – print management and marketing
7. Vacant	8. Edmunson – electrical wholesalers
9. Vacant	10. Vacant
11. AMES Douglas	12. Vacant/No sign to suggest occupier
13. Unknown	14. Power Valves International power valves manufacture/supply

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Several vacant units although there has been some turnover since the previous review
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Yes, but restricted access from main road network associated with Mead Lane constraints
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	See 4 above		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

14e: Estate: Mead Lane: Lockhouse Industrial Estate and Adjoining

Owner: Not known

Managing Agent: Not known

EH 2007 Local Plan: HE8 Employment Areas: **In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial use:** Mead Lane (East of Marshgate Drive)

Halcrow 2008 Comments and Rating: (Described as 'Marshgate Drive')

This estate is well occupied (one vacancy was recorded at the time of the survey) but its overall qualitative score ranges from poor to good. Given that most units are currently in manufacturing use, the estate would be a good candidate for redevelopment to B1 if demand for B2 units declines (as projected by the employment forecasts).

Assessment: Amber

EHDC 2012 Comments and Rating:

The area comprises the premises of Matthews Haulage and the adjoining Lockhouse Industrial Estate together with a modern brick office building, Collier House. The area is generally of low quality with congested layout and a number of units appear vacant. It would benefit from redevelopment for B1 perhaps as part of a wider development of the National Grid Land when access to the whole of Mead Lane is improved.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics Comments April 2016:

Wessex Economics agrees with the EHDC comments above. The units are mostly old and low quality and the estate is poorly maintained with inadequate parking and access constraints as well as an inefficient layout. However, at the time of site visits the units all seemed to be in occupation, although it is difficult to assess whether some may be underutilised.

Outstanding Planning Consents:

Opportunities for Enhancement:

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2 – Occupiers @April 2016

Matthews Haulage – haulage yard and associated vehicle repair/sales businesses	Collier House: Team Q
Lockhouse Industrial Estate:	
Igloos Toilet Manufacturers	Riverside Sports Cars
Packaging Direct Ltd	The Tint Shop
Forum Events	Creative Star (71, Mead Lane)
Herts Electrical Contractors	CSL Care Group
Lighting Design Solutions	Andrews Steel
LDS Fabrications	Smyle

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	No	2. What is the demand/vacancy rate?	Low number of vacancies
3. What is the quality of the land like?	Poor	4. Good accessibility/parking?	Same issues as rest of Mead Lane, inadequate parking
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Congested in places – Shares Mead lane access problems		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	No	Is the estate in a good position?	Yes
Is the estate visible	No	Is the estate flexible?	No
Is the general quality of the environment good?	Poor	Is there any conflict with adjacent uses?	No
Is the market perception positive?	No		

14f: Estate: Conbar House, Expo House, Orland House and Chelsing House fronting Mead Lane

Owner: Various

Managing Agent: Not known

EH 2007 Local Plan: HE8 Employment Areas: **In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial use:** Mead Lane (East of Marshgate Drive)

Halcrow 2008 Comments and Rating:

Not clear how Halcrow dealt with the various elements of Mead Lane in 2008

EHDC 2012 Comments and Rating:

Conbar House is a modern (1970s) brick office building, three stories fronting Mead Lane and four to the rear where the extended ground floor comprises workshop units. Expo House is a two storey office with an attached workshop to the rear which appears to be vacant. Orland House is a large modern warehouse with a two storey office block fronting Mead Lane. An extension is currently under construction. Chelsing House is a two storey office building with extensive parking to the rear.

Assessment: Amber

See Appraisal Criteria below

Wessex Economics Comments April 2016:

The upper floors of Conbar house are being converted to 12 residential flats, with the ground floor/half basement retained for employment uses. The workshop units to the rear are still being used and well occupied. The extension to Orland House has been completed. Chelsing House is in very poor condition/old and looks to be underutilised.

Outstanding Planning Consents:

Opportunities for Enhancement: Access improvements to Mead Lane

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

Conbar House – currently vacant and undergoing works	Workshops Units Ground Floor to rear – three in vehicle repair uses, fourth East Herts Signs/Engraving
Expo House – vacant	Chelsing House: Chelsing Assemblies Ltd, Mode Lighting UK Ltd
Orland House. SOP International Asian/Oriental Food Importers	

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Some vacancies and likely under-utilisation, with the exception of Orland House
3. What is the quality of the land like?	Good	4. Good accessibility/parking?	Yes, although Mead Lane access constraints apply. Also, on-street parking along the building frontages causes traffic congestion on the road reducing the traffic to one-way/single file which is problematic for HGVs accessing the remainder of Mead Lane

Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	No
Does the estate have good accessibility and parking provision	Yes (Mead Land caveats)		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	Yes, most of it benefits from road frontage	Is the estate flexible?	Yes
Is the general quality of the environment good?	Yes	Is there any conflict with adjacent uses?	No
Is the market perception positive?	Yes		

14g. Estate: Dicker Mill, Hertford

Owner: Dicker Mill Investments, 15a Dicker Mill, Hertford, SH13 7AE - 01992 554456

Managing Agent: as above

EH 2007 Local Plan: HE8 Employment Areas: In accordance with Policy EDE1 the following sites are defined as Employment Areas on the Proposals Map and will be primarily reserved for industry, comprising Classes B1 Business and B2 General Industrial use: Mead Lane (East of Marshgate Drive). **Note – the Proposals Map includes the Dicker Mill area within the employment allocation covered by HE8 although the policy wording does not refer to the Dicker Mill area**

Halcrow 2008 Comments and Rating:

The estate benefits from its location which is relatively close to the town centre while being relatively isolated from residential areas therefore avoiding major conflicts with adjacent land uses. Its overall quality is average but it serves the need of smaller occupiers in Hertford.

Assessment: **Green**

EHDC 2012 Comments and Rating:

The overall quality of the estate is poor to average but there are few vacant buildings. Parking and servicing space is adequate but layout of parking/servicing areas is haphazard. Despite these shortcomings, the estate appears to fulfil a useful local function and, as noted by Halcrow, is well located and has no major conflicts. Long term proposals to improve access to the Mead Lane area will improve access to the eastern end of the site from Marshgate Drive, possibly enabling the western access from Mead Lane to be closed though this would require the agreement of the owners.

Assessment: **Green**

See Appraisal Criteria below

Wessex Economics Comments April 2016:

WEC agree with the EHDC comments above and confirm the poor quality of the estate, inadequate parking and circulation and poor quality of units. Whilst in a useful location and close proximity to the town centre, access to the site is restricted being via a narrow and small bridge. New residential units now line the approach (Mill Road) to the site creating conflict in traffic movements. On inspection (April 2016), despite the poor quality of the estate, it is well occupied with limited vacant units and is clearly serving a local, low cost occupier market. A small number of units appear to be in the process of being refurbished.

Outstanding Planning Consents:

Opportunities for Enhancement: Improved access as part of improvements to Mead Lane

Proposal:	Partners	Costs	Timeframe	Priority
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Part 2. Occupiers @April 2016

Starting from western end of Dicker Mill Complex:	
First unit after bridge – Natural Living	1. Occupied but no sign
2. Servicing brakes and tyres	3. Harts Radiators
4 Hot Dog Grooming	5, 6 and 7. Perry Signs
8 Abbiss	9. Magic Car repairs
10 Barbe & Bald Ltd Furniture repairs	11. Gullpine Printers
12. Vacant	13. Hertford Horse Bits – equine supplies
14. OnPoint	12. Vdub Shed, vw servicing/repairs
16 Art Vehicle Solutions	17. Colin Gunning VW Repairs/servicing
18. DM Tyre and MoT	19. Quadrant Design and Print
20. B.C Autos	21,22. TG Commercials Commercial Vehicle Services
23/24. Hertford Tyre Services	
Eastern End of site adjoining Marshgate Lane:	
6,6(b), 7, 8 (b), (c) (d) (e) Ducting and Vent Ltd – Ducting Engineers	8(f) (g) T. Hayden Welding Supplies
8(a) Metal Morphics – car body repairs	
Building to rear of above	
8f. NC Contract Furniture	Units 13, 14, unknown
Detached building to west of Marshgate Drive	
12. Glitter Monster Crafts	13. C. Beach 13(b) HW Taylor (Companies linked to Dicker Mill Investments)
15c. Cadtech	15. Westminster Forum events organisation (Specifically business/politics briefings).
15(d) Pretty Cool	15(a) Dicker Mill Investments

Part 3– Appraisal Criteria

Estate Appraisal Criteria 1: Fitness for purpose			
1. Is estate fit for its current purpose?	Yes	2. What is the demand/vacancy rate?	Low vacancy
3. What is the quality of the land like?	Average/poor	4. Good accessibility/parking?	Poor accessibility, circulation and parking
Estate Appraisal Criteria 2: Sustainability			
Is the estate sustainable for its present use?	Yes	Is there conflict with adjacent uses?	Accessibility is now conflicting with residential uses
Does the estate have good accessibility and parking provision	No		

Estate Appraisal Criteria 3: Marketability			
Is the estate marketable?	Yes	Is the estate in a good position?	Yes
Is the estate visible	No	Is the estate flexible?	Yes
Is the general quality of the environment good?	No (poor)	Is there any conflict with adjacent uses?	No
Is the market perception positive?	No		

Appendix A7. Analysis of Transport Accessibility of Hertford and Ware

Hertford and Ware Strategic Accessibility

1. Strategic accessibility can be defined as ease of access from a particular location to/from key destinations such as major urban centres, airports, ports etc, is a significant factor in determining business location and is reflected in inward investment decisions whether by UK businesses or international businesses.
2. Different types of businesses will prioritise different types of accessibility. Major warehousing operations for example typically prioritise locations to the national motorway/trunk road network, with links to ports and airports being important for some types of business. In contrast many firms are primarily concerned about the size of the catchment area from which they can recruit; and linked to this the availability of the skills they require in this catchment area.
3. So how accessible are Hertford and Ware? In terms of road networks Hertford and Ware are well linked into the national motorway networks, by means of the A414 to junction 4 of the A1(M); and via either the dual A10 or via the A414/A1(M) to the M25. The link to the M11 from Hertford and Ware is unsatisfactory being by the dual A414 eastwards; and then by the A414 through the built up area of Harlow to Junction 7; or for the northbound M11 via the A10 and A120 to Junction 8.
4. Indicative journey times to the key motorway junctions on the national motorway network from Hertford and Ware (key nodes close to major employment areas) are shown in Figure A7.1. In theory Hertford and Ware have very good access to the national motorway networks, particularly the A1(M) and the M25, and outside of peak hours the journey times shown in Figure A7.1 are achievable. But in peak hours journey time are both less predictable and can be considerably longer.

Figure A7:1 Minimum Journey Times to Key Motorway/Trunk Road from Hertford and Ware

	Hertford A414 Gascoyne Way/London Road /Ware Road/ Roundabout - SG13 7LA	Ware A119 London Road/Marsh Lane Roundabout south of Ware Station, SG12 9LX
J4 A1(M)	11	16
J25 M25	14	14
J7 M11	12	18
J8 M11	24	25
A10/A505	27	28

Source: Wessex Economics

5. Work by Hertfordshire County Council¹ identifies the following congestion hotspots on the road network that is critical for the effective functioning of business in Hertford and Ware:
- Peak period congestion on the A414 east and westbound at Gascoyne Way, particularly between the County Hall roundabout and Bluecoats roundabout
 - Congestion on the A119 Ware Road at the Bluecoats roundabout and Mill Lane junctions
 - Morning peak period congestion on A119 south bound at the junction of North Road and Bramfield Road
 - Morning peak congestion on the A10 Rush Green roundabout and difficulty joining the A10 from slip roads
 - Approaches to the A414 Eastwick roundabout in the morning peak
 - The A10 approaches to M25 Waltham Cross Junction 25 in peak periods (Great Cambridge Road)
 - Congestion at peak hours at Junction 4 of the A1 (M) for westbound traffic on both the motorway junction and Oldings Roundabout
6. The challenge for owners or developers of business floorspace in Hertford and Ware is the unpredictability of journey times for staff commuting from surrounding area, and for those travelling from their place of work on business; or for those needing to transport goods to and from their premises. Many business parks or industrial estates located in settlements on the A1(M) or the M11 or M25, can offer shorter journey times, which are subject to less uncertainty to the national motorway network.
7. The availability of good rail access to London, to airports and other key locations can also be important in business locations; and public transport access is often important in location decisions for employers wanting to be able to recruit from a large labour market area. Hertford and Ware have good rail connections to London, but the direction of flow in terms of labour is out of Hertford and Ware into London. Both towns have significant levels of out-commuting by train.
8. Figure A7.2 shows rail journey times to central London stations from stations in Hertford and Ware and compares these with journey times from locations in the A1(M) corridor and the M11 corridor. The stations in the A1(M) corridor all have significantly lower journey times to a London terminus than services from Hertford North. Harlow also has a significantly shorter journey time to Liverpool Street than services from Hertford East and Ware and more frequent services; and Bishop's Stortford also has a journey time 10 minutes faster to Liverpool Street than journeys from Hertford East and Ware, and a more frequent service.

¹ Identification of Congestion Hotspots in Hertfordshire, Herts County Council, March 2015

Figure A7.2: Rail Journey Times to Central London Stations, Service Frequency and Cost

Station	Destination	Fastest Journey Times Hour: Minutes	Changes	Service Frequency Hour: Minutes	Monthly Season Ticket	Average District House Price
Hertford East	London Liverpool St	0.51	0	0.22	£232	£334,690
Ware	London Liverpool St	0.47	0	0.22	£232	£334,690
Bishop's Stortford	London Liverpool St	0.38	0	0.07	£346	£334,690
Harlow	London Liverpool St	0.31	0	0.09	£294	£199,320
Hertford North	London Moorgate	0.42	0	0.10	£253	£334,690
Hertford North	London Kings Cross	0.40	1	0.09	£253	£334,690
Stevenage	London Kings Cross	0.22	0	0.07	£329	£182,240
Welwyn Garden City	London Kings Cross	0.23	0	0.08	£258	£310,510
Hatfield	London Kings Cross	0.22	0	0.08	£240	£310,510

Source: commutefrom.com

- Overall, Hertford and Ware are well located and compared to many locations have good access to the national motorway network and good rail links particularly to London. However towns located in the A1 (M) and M11 corridors have an advantage compared to Hertford and Ware in competing for inward investment and in competing to secure businesses within the sub-region who are looking to move to new premises, whether that is associated with expansion or a simply a need to relocate to premises better suited to the business.

Appendix A8. Reference Documents

Reference Documents

1. Economic Development Strategy 2008-2011, EHDC
2. East Herts Employment Land and Policy Review, Halcrow Group, 2008
3. Employment Forecasts and Strategic Economic Development Advice, DTZ, 2012
4. Town Wide Employment Study for Bishop's Stortford, Wessex Economics, 2013
5. Employment Land Review Update, EHDC, 2013
6. Mead Lane Urban Design Framework, EHDC, 2013
7. Buntingford Employment Study, Wessex Economics, 2014
8. Economic Development Vision and Action Plan 2016/17 – 2019/20, EHDC, 2016