

Hertsmere, St. Albans and Welwyn Hatfield Councils CENTRAL HERTFORDSHIRE EMPLOYMENT LAND REVIEW



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Interim Report - Appendices
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APPENDIX A

Business Space Sectors

Our analysis assumes that the following sectors occupy employment space.

Sectors	SIC (1992)	Activities
Manufacturing	15.11-37.20 (ex publishing, 22.11-22.15)	Includes all manufacturing, including recycling, but excludes publishing)
Some construction	45.3-45.4	Electricians Plumbing Other building installation Plastering Joinery installation Floor and wall covering Painting and glazing Other building completion
Motor vehicle activities	50.20, 50.40	Maintenance and repair of motor vehicles Sale, maintenance and repair of motor cycles and related parts and accessories
Sewage and refuse disposal	90.00	Sewage and refuse disposal, Sanitation and similar activities.
Labour recruitment (% share)	74.5	Labour recruitment and provision of personnel
Warehousing Sectors	SIC (1992)	Activities
Wholesale	51.11-51.70	Wholesale on a fee contract basis Wholesale of goods
Freight transport by road	60.24	
Cargo handling	63.11	
Storage and Warehousing	63.12	
Other supporting land transport activities	63.21	
Post and courier activities	64.11-64.12	
Packaging activities	74.82	Packaging activities
Labour recruitment (% share)	74.5	Labour recruitment and provision of personnel
Office Sectors (including R&D)	SIC (1992)	Activities
Some other business activities	74.60, 74.83, 74.84, 74.1, 74.2, 74.3, 74.4	Investigation and security activities Secretarial and translation activities Other business activities nec Accounting/bookkeeping activities etc Architectural/engineering activities etc Technical testing and analysis Advertising
Some social and personal services activities	91.11, 91.12, 91.20, 91.32, 91.33, 92.11, 92.12, 91.20, 91.32, 91.33, 92.11, 92.12, 92.20, 92.40	Activities: business/employers orgs Activities of professional orgs Activities of trade unions Activities of political orgs Activities other membership orgs Motion picture and video production Motion picture and video distribution Radio and television activities News agency activities

Sectors	SIC (1992)	Activities
Administration of the State	75.1, 75.3	Administration of the State and the economic and social policy of the community Compulsory social services activities
Publishing	22.1	
Financial intermediation	65, 66, 67	Financial intermediation, except insurance and pension funding Insurance and pension funding, except compulsory social security Activities auxiliary to financial intermediation
Real estate and business activities	70, 72, 73	Real estate activities Computer and related activities Research and development
Labour recruitment (% share)	74.5	Labour recruitment and provision of personnel

The Experian forecast breaks employment into just 30 sectors, which are listed in the box below. Our mapping of sectors into space requires a finer-grained breakdown. For example, to estimate employment in offices we need to include Publishing, (SIC 22.1). But in the Experian figures Publishing jobs are not shown separately; they are subsumed in the larger category of Paper, Printing and Publishing.

Experian Sectors
Agriculture, Forestry & Fishing
Other Mining
Oil & Gas Extraction
Food, Drink & Tobacco
Textiles & Clothing
Wood & Wood Products
Paper, Printing & Publishing
Fuel Refining
Chemicals
Rubber & Plastics
Minerals
Metals
Machinery & Equipment
Electrical & Optical Equipment
Transport Equipment
Other
Gas, Electricity & Water
Construction
Wholesaling
Retailing
Hotels & Catering
Transport
Communications
Banking & Insurance
Other Financial & Business Services
Business Services
Public Admin & Defence
Education & Health
Health
Other Services

To estimate base year employment in the *'small sectors'* which are not shown separately by Experian, we use the share of each small sector in the Experian *'large sector'* of which it forms part, as shown by Government statistics. Thus, in our example, the Annual Business Enquiry (ABI) for 2001 shows 280 jobs in Publishing in St. Albans, and 590 jobs in Paper, Printing and Publishing. Thus, Publishing provided 47% of St Albans jobs in Paper, Printing and Publishing. We now apply this ratio to the Experian figures, which are different from the ABI for various technical reasons (for example, Experian includes the self-employed, and it aims to correct errors in the ABI). Experian for 2001 shows 901 jobs in Paper, Printing and Publishing. Multiplied by 47%, this produces an estimated 420 jobs in Publishing.

To estimate *future* jobs in Publishing, we assume this ratio of small-sector to large-sector jobs remains constant. For example, in St Albans in 2021 we assume that Publishing in St Albans will continue to account for 47% of jobs in Paper, Printing and Publishing. Experian

shows that for St Albans there will be 360 jobs in Paper, Printing and Publishing in 2021. Multiplied by 47%, this produces 170 jobs in Publishing in St Albans in 2021.

In practice, the shares of 'small sectors' to 'large sectors' of course change over time. As an alternative to the 'fixed-shares' method described above, we have considered using a 'floating-shares' methods, which forecasts such changes in shares over the plan period. But we concluded that such forecasting would not produce robust results, because only limited historical data is available, such data is unreliable at this extreme level of detail, and there is no dependable way of distinguishing long-term structural trends from random fluctuations and cyclical movements.

APPENDIX B

Travel to Work

Travel to Work - Hertsmere

Live in Hertsmere 2001			
Work in	Total	45,995	100%
	Hertsmere	18,900	41%
	St. Albans	1,640	4%
	Welwyn Hatfield	1,186	3%
	Watford	2,944	6%
	London	17,106	38%
	<i>(Westminster)</i>	<i>(2,360)</i>	<i>(5%)</i>
	<i>(Barnet)</i>	<i>(3,924)</i>	<i>(9%)</i>
	Rest of Herts	2,151	5%
	Elsewhere	2,068	3%
Work in Hertsmere 2001			
Live in	Total	44,355	100%
	Hertsmere	18,900	43%
	St. Albans	2,241	5%
	Watford	2,457	6%
	Three Rivers	1,465	3%
	Welwyn Hatfield	1,899	5%
	London	9,583	22%
	<i>(Barnet)</i>	<i>(3,310)</i>	<i>(8%)</i>
	<i>(Harrow)</i>	<i>(1,529)</i>	<i>(4%)</i>
	Rest of Herts	3,197	7%
Elsewhere	4,613	9%	

Source: Census 2001

NB Figures in italics form part of the London total.

Travel to Work - St. Albans

Live in St. Albans 2001			
Work in	Total	65,622	100%
	St. Albans	32,233	49%
	Hertsmere	2,241	3%
	Welwyn Hatfield	3,446	5%
	Dacorum	2,787	4%
	London	14,621	22%
	<i>(Westminster)</i>	<i>(2,820)</i>	<i>(4%)</i>
	<i>(City of London)</i>	<i>(2,887)</i>	<i>(4%)</i>
	Rest of Herts	4,506	7%
	Luton	1,672	3%
Elsewhere	4,116	6%	
Work in St. Albans 2001			
Live in	Total	55,615	100%
	St. Albans	32,233	58%
	Dacorum	2,742	5%
	Hertsmere	1,640	3%
	Welwyn Hatfield	2,552	5%
	London	2,792	5%
	Rest of Herts	4,868	9%
	Luton	2,958	5%
	South Beds	1,703	3%
	Elsewhere	4,127	7%

Source: Census 2001

NB Figures in italics form part of the London total.

Travel to Work - Welwyn Hatfield

Live in Welwyn Hatfield			
2001			
Work in	Total	46,104	100%
	Welwyn Hatfield	26,132	57%
	St. Albans	2,552	6%
	Hertsmere	1,899	4%
	East Hertfordshire	1,400	3%
	London	8,097	18%
	<i>(Westminster)</i>	<i>(1,230)</i>	<i>(3%)</i>
	<i>(Barnet)</i>	<i>(1,168)</i>	<i>(3%)</i>
	Rest of Herts	3,468	8%
	Elsewhere	2,556	6%
Work in Welwyn Hatfield			
2001			
Live in	Total	54,657	100%
	Welwyn Hatfield	26,132	48%
	St. Albans	3,446	6%
	Stevenage	3,389	3%
	North Hertfordshire	3,123	6%
	East Hertforshire	3,162	6%
	Broxbourne	1,484	3%
	London	3,758	7%
	Rest of Herts	2,818	5%
	Mid Bedfordshire	1,240	2%
Elsewhere	6,105	11%	

Source: Census 2001

NB Figures in italics form part of the London total.

APPENDIX C

Planned Supply

Hertsmere Planned Supply

	Offices			Ind/Warehousing			TOTAL		
	Gains	Losses	Net change	Gains	Losses	Net change	Gains	Losses	Net change
Change 2001-05 (completions)	46,130	-43,648	2,482	11,269	-33,639	-22,370	57,399	-77,287	-19,888
Vacant space above 7.5%	-	-	45,795	-	-	-5,636	0	0	40,159
Outstanding permissions (started 2005)	1,070	-72	998	1,540	-301	1,239	2,610	-373	2,237
Outstanding permissions (not started 2005)	31,496	-691	30,805	24,868	-10,887	13,981	56,364	-11,578	44,786
Outstanding allocations (not permitted)	0	0	0	0	0	0	0	0	0
TOTAL	78,696	-44,411	80,080	37,677	-44,827	-12,786	116,373	-89,238	67,294

Source: RTP, LSH

St. Albans Planned Supply

	Offices			Ind/Warehousing			TOTAL		
	Gains	Losses	Net change	Gains	Losses	Net change	Gains	Losses	Net change
Change 2001-05 (completions)	46,035	-49,125	-3,090	39,973	-46,505	-6,532	86,008	-95,630	-9,622
Vacant space above 7.5%	-	-	13,035	-	-	-7,803	-	-	5,232
Outstanding permissions (started 2005)	13,536	-378	13,158	19,180	-2,967	16,213	32,716	-3,345	29,371
Outstanding permissions (not started 2005)	20,010	-15,836	4,174	13,881	-34,036	-20,155	33,891	-49,872	-15,981
Outstanding allocations (not permitted 2005)	24,900	-5,530	19,370	9,500	-2,225	7,275	34,400	-7,755	26,645
TOTAL	104,481	-70,869	46,647	82,534	-85,733	-11,002	187,015	-156,602	35,645

Source: RTP, LSH

Welwyn Hatfield Planned Supply

	Offices			Ind/Warehousing			TOTAL		
	Gains	Losses	Net change	Gains	Losses	Net change	Gains	Losses	Net change
Change 2001-05 (completions)	107,882	-45,238	62,644	75,676	-28,629	47,047	183,558	-73,867	109,691
Vacant space above 7.5%	-	-	12,775	-	-	-26,921	-	-	-14,146
Outstanding permissions (started 2005)	25,937	-1,007	24,930	0	-301	-301	25,937	-1,308	24,629
Outstanding permissions (not started 2005)	107,650	-19,741	87,909	48,345	-25,246	23,099	155,995	-44,987	111,008
Outstanding allocations (not permitted)	0	0	0	69,600	0	69,600	69,600	0	69,600
TOTAL	241,469	-65,986	188,258	193,621	-54,176	112,524	435,090	-120,162	300,782

Source: RTP, LSH

APPENDIX D

Site Assessment Tables & Maps

APPENDIX E

Development Sites Suggested by Stakeholders

Development Sites Suggested by Stakeholders

Company	Contact Info.	Site Name	Site Address
Moult Walker	01462485144	Roehyde	Junction of A1(M) and A414 opposite the University of Hertfordshire
Palmer Land & Industry	01582833910	FS Cables	Wellington Rd.
Lambert Smith Hampton	01727834234	Patchetts Equestrian Centre	Hillfield Lane, Aldenham, Watford, Herts WD25 8PE
Lambert Smith Hampton	01727834235	Former Home Pac	Radlett Rd, St. Albans
Moult Walker	01462485144	Smallford Works	Smallford Ln, St. Albans
Entec	01926439081	The Crown Estate Holdings	East of Hemel Hempstead, St. Albans

APPENDIX F

List of Abbreviations

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AAP	Area Action Plan
ABI	Annual Business Enquiry
BRE	Building Research Establishment
DCLG	Department for Communities and Local Government
DPD	Development Plan Document
EA	Employment Areas
EBS	Experian Business Strategies
EEDA	East of England Development Agency
EERA	East of England Regional Assembly
EG	Enhanced Growth
EiP	Examination in Public
FBS	Financial and Business Services
ICT	Information and Communications Technology
LDD	Local Development Document
LDF	Local Development Framework
LPA	Local Planning Authority
LSH	Lambert Smith Hampton
ODPM	Office of the Deputy Prime Minister
OECD	Organisation for Economic Co-operation and Development
PPG	Planning Policy Guidance
PPS	Planning Policy Statement
RDC	Regional Distribution Centre
RES	Regional Economic Strategy
RSS	Regional Spatial Strategy
SEERA	South East England Regional Assembly
SERPLAN	South East Regional Planning body
SIC	Standard Industrial Classification

SME	Small to Medium Enterprise
SOA	Super Output Area
SPD	Supplementary Planning Document