

# enterprise **m3**

Driving prosperity in the M3 corridor



## **Commercial Property Market Study**

**A report for Enterprise M3 by  
its Land & Property Action Group  
- Appendices**

**April 2013**





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## Appendix 1: Basingstoke & Andover Pen Portrait



### Description

Basingstoke and Andover market area covers Basingstoke and Deane Borough and the northern third of Test Valley Borough (Andover). The area is predominantly rural with Andover and Basingstoke the only major employment centres. Elsewhere, there are a number of smaller market towns including Overton, Tadley and Whitchurch.

There are a number of large business parks in the market area including Chineham and Basing View in Basingstoke and the Walworth Business Park in Andover, as well as numerous smaller business parks. Major employers in the market area include: the AA, AXA Wealth, Huawei, Motorola, Shire Pharmaceuticals, Sony, Stannah Lifts, Thales, Twinings and Vitacress. There is a very strong private sector employee presence in Business Administration and Support Services, Information and Communications, Manufacturing and Wholesale. The public sector is a major employer, particularly in local government and in the health sector. There were around 111,400 employees in 2011.

### Labour Market

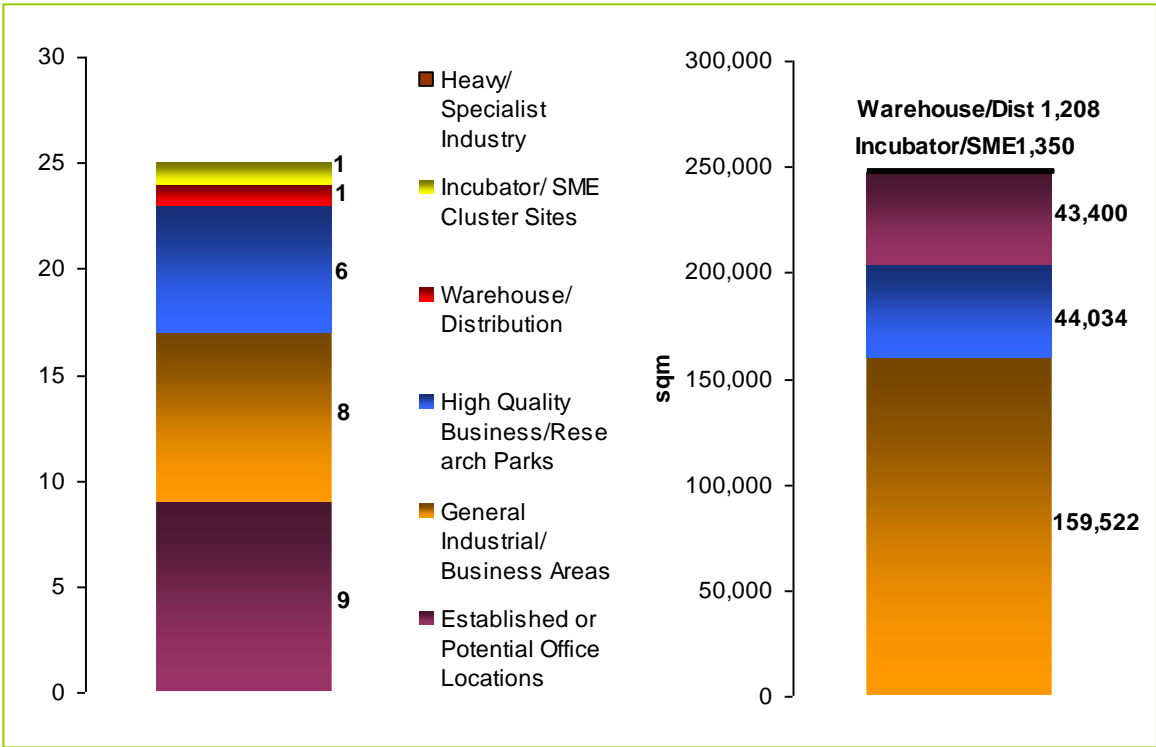
Employment rates are around 77% of the working age population, well above the England average of 70%, whilst unemployed jobseekers allowance rates were around half the national average. The area has 79% of workers employed in the private sector, more than the England rate (77%). Around 42% of the workforce are qualified to degree or equivalent levels, compared to 38% nationally. Median average workplace earnings at £540 per week are above the England average of £510.

### Commercial sites, floorspace and average rents

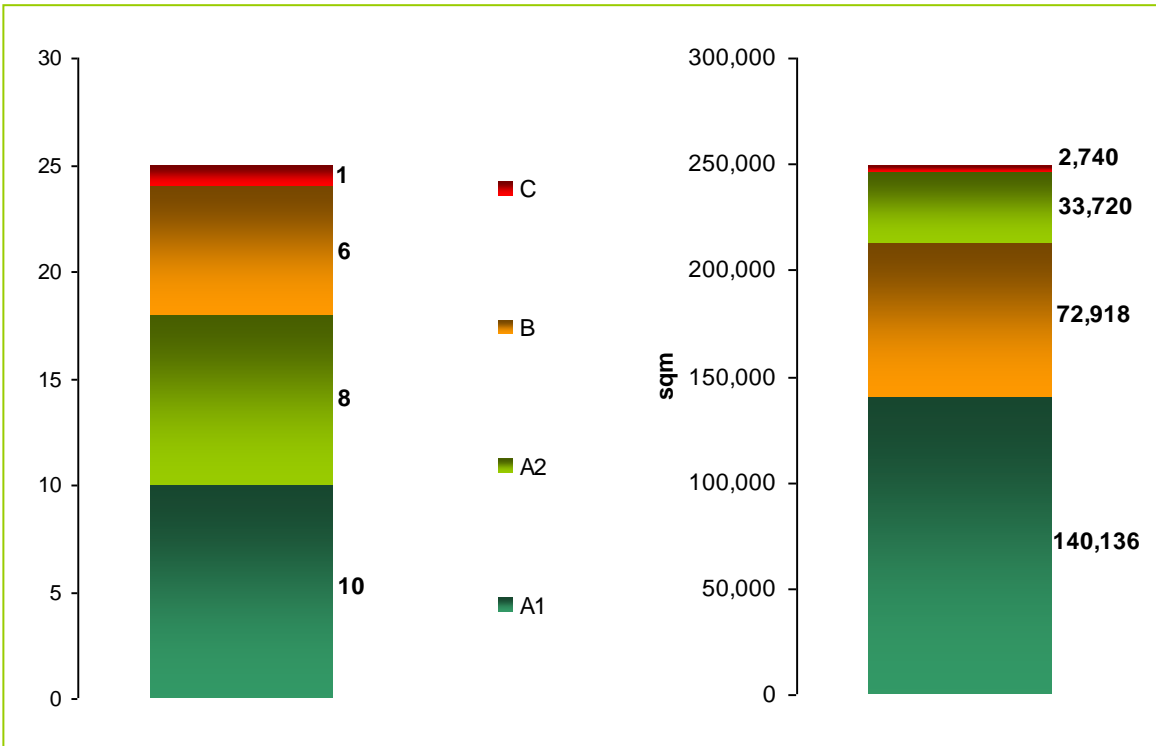
According to Valuation Office Agency 2012 data and the whole district definition (all of Basingstoke & Deane and Test Valley) there were around 6,830 hereditaments, split: Industrial (2,530, 37%); Office (2,070, 30%); Retail (1,550, 23%); and Other (700, 10%). Total floorspace for the two whole districts was around 3.2m<sup>2</sup>, with almost two thirds (2.1 m<sup>2</sup>) attributable to industrial use.

The Basingstoke & Andover market area has office rents being quoted that, at an average of about £12.00/sq ft pa, are the lowest of the Enterprise M3 LEP market areas. However, as with all locations, there are examples of particular buildings where rents well above and below the average are being sought. Much depends upon the characteristics of individual buildings and the terms on which they are being offered. Basingstoke and Andover have a wide range of industrial units and storage land and rents vary quite widely, with an average of about £7.00/sq ft pa, circa 10% lower than the LEP average.

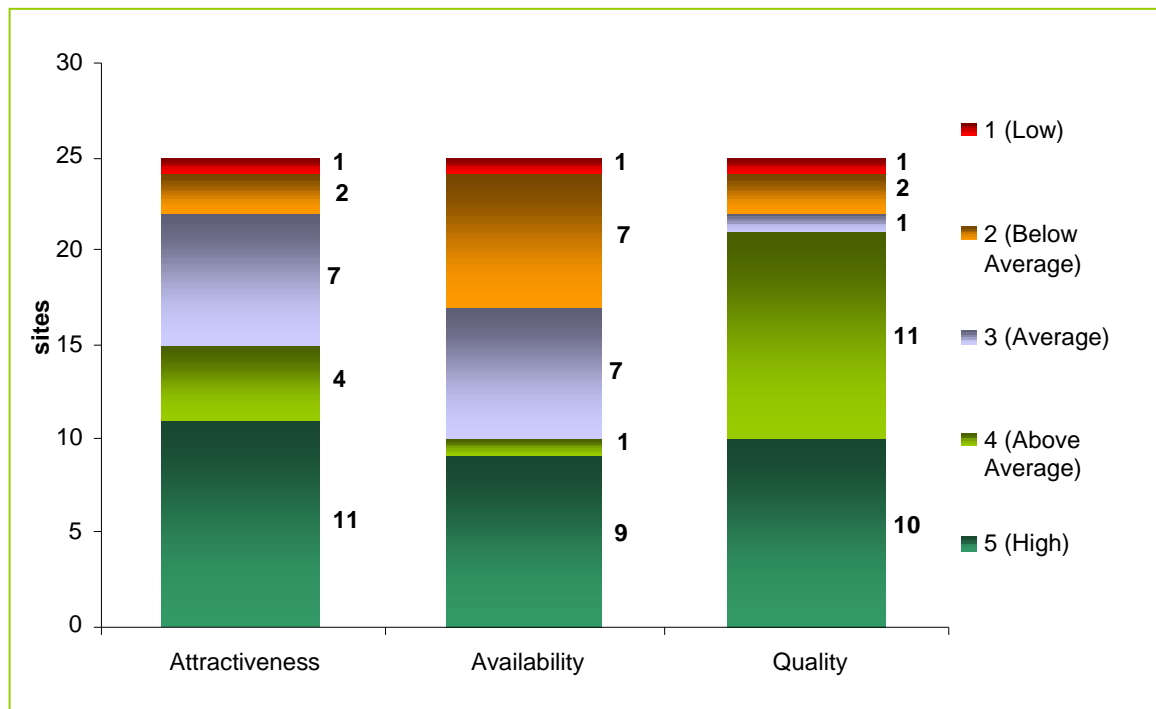
Basingstoke and Andover Sites and Floorspace (sqm) by Market Segment



Basingstoke and Andover Sites and Floorspace (sqm) by Development Potential



## Basingstoke and Andover Sites by the Individual Indicators



### Basingstoke and Andover Market Area Site Statistics

The Basingstoke and Andover market area had 25 sites assessed covering close to one quarter of a million square metres of floorspace (249,514m<sup>2</sup>). There were no new sites from the previous Hampshire based HEP site assessment study back in 2010, and six deletions caused by one built-out site, several lapsed permissions and reduced development below threshold suggesting little activity in recent years.

#### Market Segment

- Five out of the eight market segments are represented, but mostly in Established or potential office locations (nine sites), General business and industrial areas (eight sites) and high quality business/research park (six sites).
- With close to 160,000 sqm of estimated floorspace, the General business and industrial areas account for almost two thirds of floorspace in the market area.

#### Development Potential

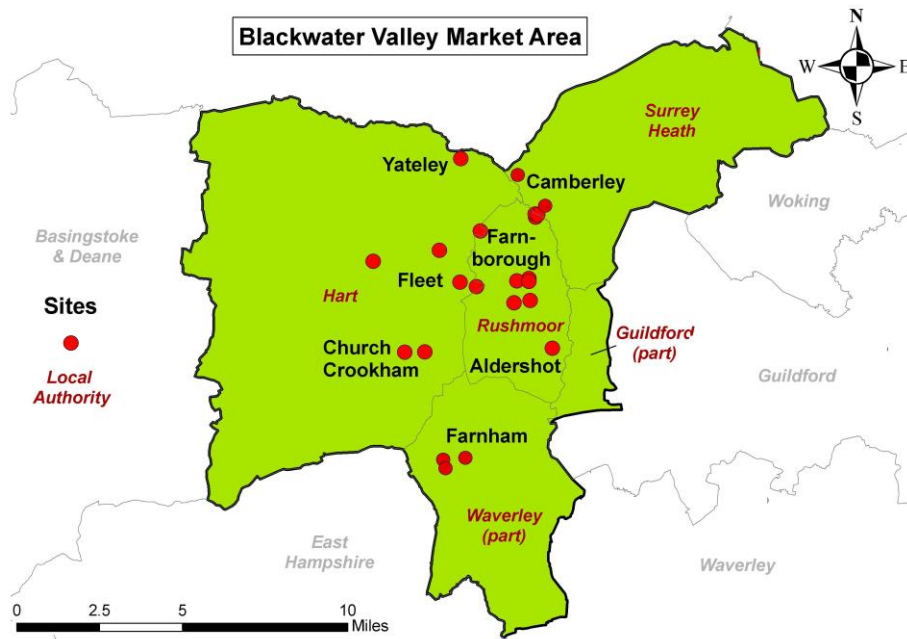
- Two fifths of sites are considered A1 sites, with an estimated 140,136 sqm of total floorspace available. Eight sites are classed A2 with 33,720 sqm of total floorspace, that when combined with A1 sites implies close to 70% all sites in the market area are expected to supply the market over time with high quality premises.
- Six B and one C assessed developments come with 72,918 sqm and 2,740 sqm of total floorspace respectively.

#### Individual Indicators

- Site quality is a strength in Basingstoke and Andover, in part reflecting a number of high quality business and industrial parks with good access to local amenities e.g. Chineham. Market attractiveness although less prominent is also strong, which raises questions over the location side for a number of sites.
- The Availability indicator scored the lowest marks overall with almost as many sites (eight) scoring low or below average as scored above average and high (ten).



## Appendix 1: Blackwater Valley Pen Portrait



### Description

The Blackwater Valley market area covers the local authority districts of Hart, Rushmoor and Surrey Heath in their entirety, as well as the western section of Waverley around Farnham, and a very thin slice of Guildford that adjoins Rushmoor at Ashe. Farnborough Airport provides business aviation services and a gateway into London, whilst Heathrow and Gatwick international airports are less than one hours drive away.

There are a number of large business parks in the market area including: IQ Farnborough, Farnborough Aerospace Park, Cody Technology Park and Watchmoor Park, as well as numerous smaller business parks. Major private sector employers include: BAe Systems, CSC Computer Sciences, Eli Lilly pharmaceuticals, IBM, Merrill Lynch, QinetiQ, Siemens, Sodexo Defence Services and Toshiba. There is a very strong private sector employee presence in the Information and Communications sector, as well as in the Professional, Scientific and Technical and the Wholesale sectors. The public sector is also a major employer, particularly in the many military bases and in the health sector. There were around 142,300 employees in 2011.

### Labour Market

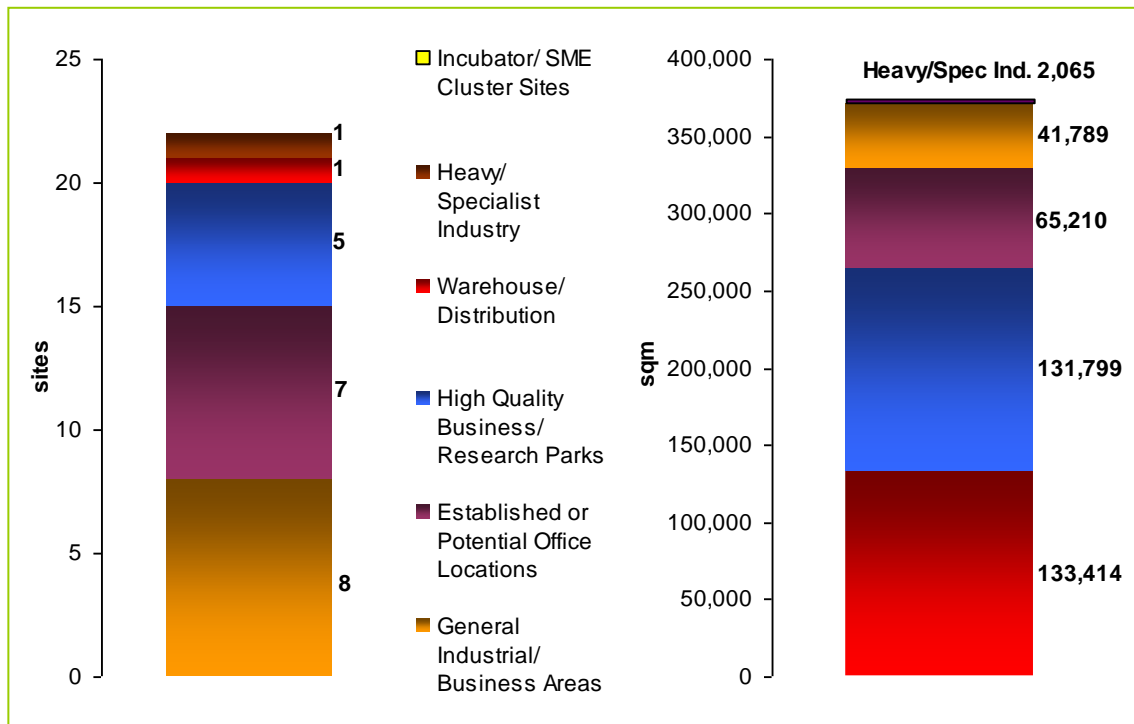
Average employment rates in the market area are around 78% of the working age population, well above the England average of 70%, whilst unemployed jobseekers allowance rates are half the national average. The market area has a 78% private sector employment rate, marginally higher than the England rate (77%). Around 42% of the workforce are qualified to degree or equivalent levels, compared to 38% nationally. Median average workplace earnings at £600 per week are much higher than the England average of £510, reflecting the skilled workforce and ripple effect from market area's proximity to London.

### Commercial sites, floorspace and average rents

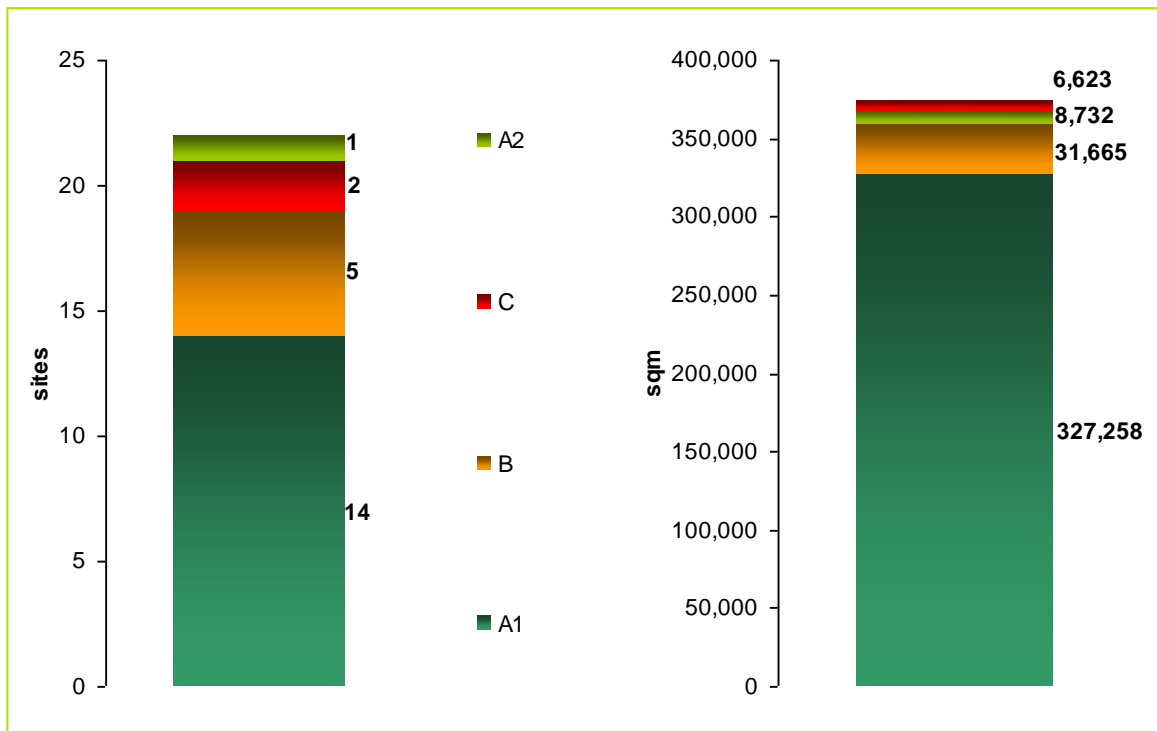
According to Valuation Office Agency 2012 data and the whole district definition (Hart, Rushmoor and Surrey Heath) there were around 5,590 hereditaments, split: Retail (2,120, 40%); Office (1,750, 31%); Industrial (1,540, 28%); and Other (530, 9%). Total floorspace for the three whole districts was around 2.2m<sup>2</sup>, with just over one third (0.8 m<sup>2</sup>) attributable to industrial use.

Office rents being quoted in the Blackwater Valley average about £14.90/sq ft pa; this is about 8% below average for the LEP due to higher rents being achieved further northeast in Surrey. Quoting rents for industrial property in the Blackwater Valley average about £7.80/sq ft pa, which is very close to the average for the overall LEP area.

### Blackwater Valley Sites and Floorspace (sqm) by Market Segment

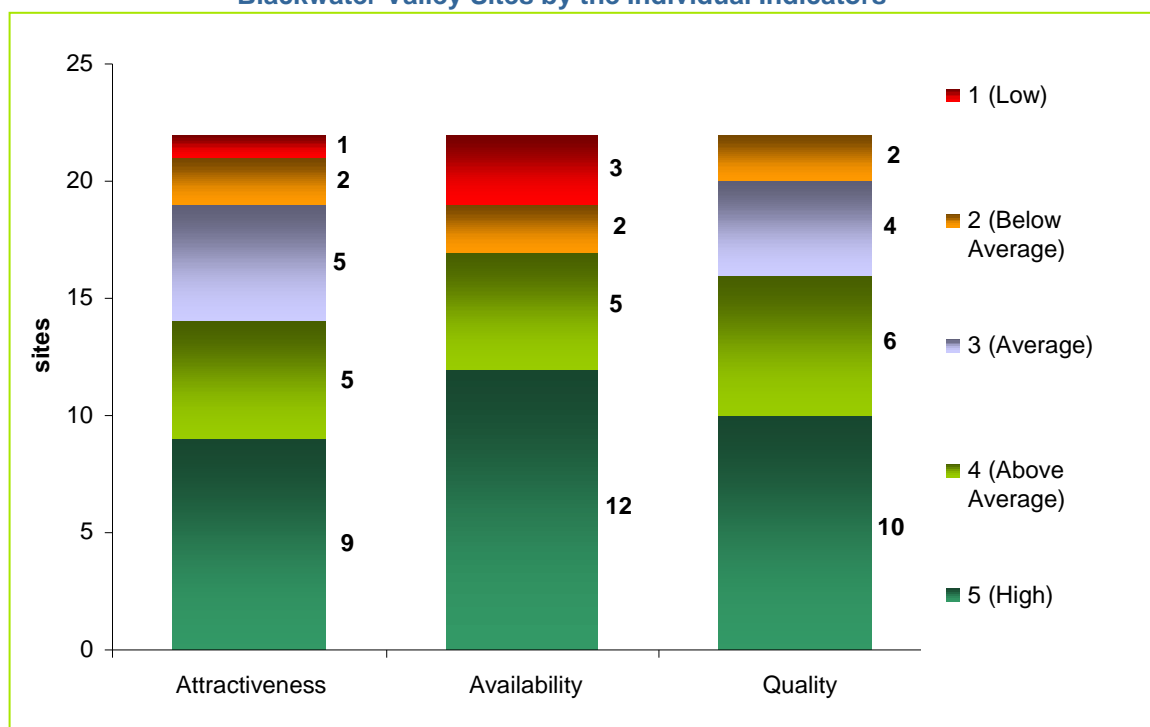


### Blackwater Valley Sites and Floorspace (sqm) by Development Potential





### Blackwater Valley Sites by the Individual Indicators



### Blackwater Valley Market Area Site Statistics

The Blackwater market area had 22 assessed sites covering around 374,000 sqm of floorspace. There were no new sites in Hart or Rushmoor from the previous Hampshire based HEP site assessment study back in 2010, and with four deletions (refurbishment, lapsed or other use) suggests little activity in the last two years. The Surrey based sites are all new in respect to the 2012 study.

#### Market Segment

- General business and industrial areas (eight sites), Established or potential office locations (seven sites), and high quality business/research park (five sites) account for more sites. The sole Heavy/Specialist site in the Enterprise M3 is in this market area.
- With close to 133,000 and 132,000 sqm of estimated floorspace respectively, Warehousing/Distribution and High Quality between them account 70% of floorspace.

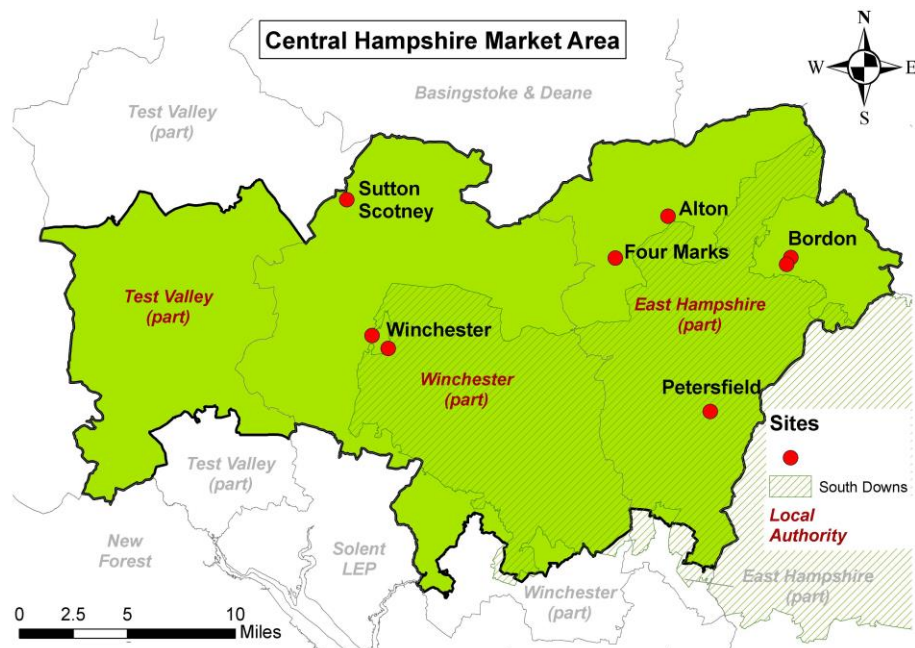
#### Development Potential

- Close to two thirds of sites are A1 sites, and with an estimated 327,258 sqm or 87% of total floorspace. There is a single A2 site with 8,732 sqm of total floorspace.
- Five B and two C assessed developments come with 31,665 sqm and 6,623 sqm of total floorspace respectively.

#### Individual Indicators

- Availability was the strongest of the three individual indicators in the Blackwater Valley, even though there are questions for five of the sites.
- Site Quality saw 16 sites with Above average and High scores, whilst Attractiveness was marginally lower with 14 sites.

## Appendix 1: Central Hampshire Pen Portrait



### Description

Central Hampshire consists of East Hampshire, Test Valley and Winchester local authority districts, although none in their entirety. The southern sections of all three local authorities come under the Solent LEP to some degree, whilst the northern third of Test Valley (Andover) sits in the Basingstoke and Andover market area. The landscape is predominantly rural, with large swathes within the South Downs National Park.

The City of Winchester is the only major employment centre in the market area, as well as being the County town of Hampshire. There are a number of smaller market towns including Alton, Bordon and Petersfield offering local employment opportunities. There are no large business parks, but a number of smaller locations such as; Alton Business Centre, Bar End and Winnall Industrial Parks (Winchester) and Petersfield Business Park. Larger private sector employers include ATC Lasham Ltd and Veolia. There is a very strong private sector employee presence in Information and Communications and in the Business Administration and Support Services sectors. The public sector is a major employer, particularly in local government, the military bases and in the health sector. There were around 92,100 employees in 2011.

### Labour Market

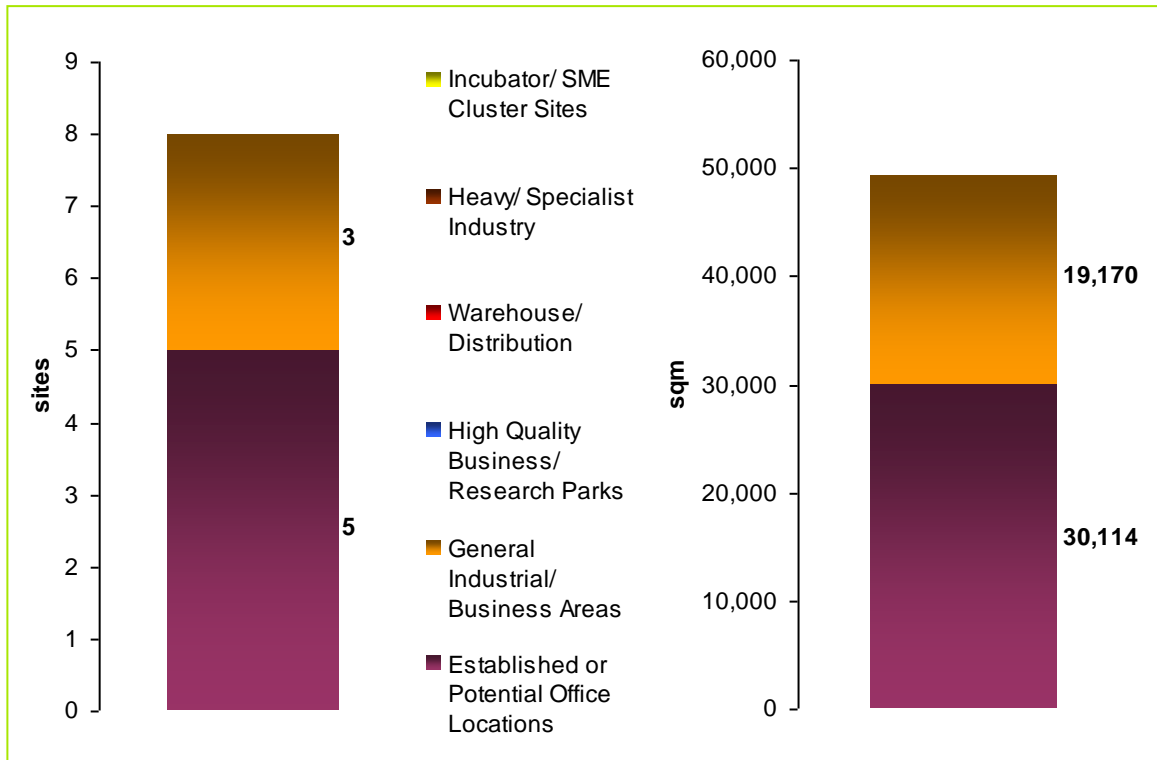
Average employment rates are around 75% of the working age population, well above the England average of 70%, whilst unemployed jobseekers allowance rates were around three times lower than the national average. The area has marginally fewer workers employed in the private sector (76%) than the England rate (77%). Around 47% of the workforce are qualified to degree or equivalent levels, compared to 38% nationally. Median average workplace earnings at £510 per week are in line with the England average (£510).

### Commercial sites, floorspace and average rents

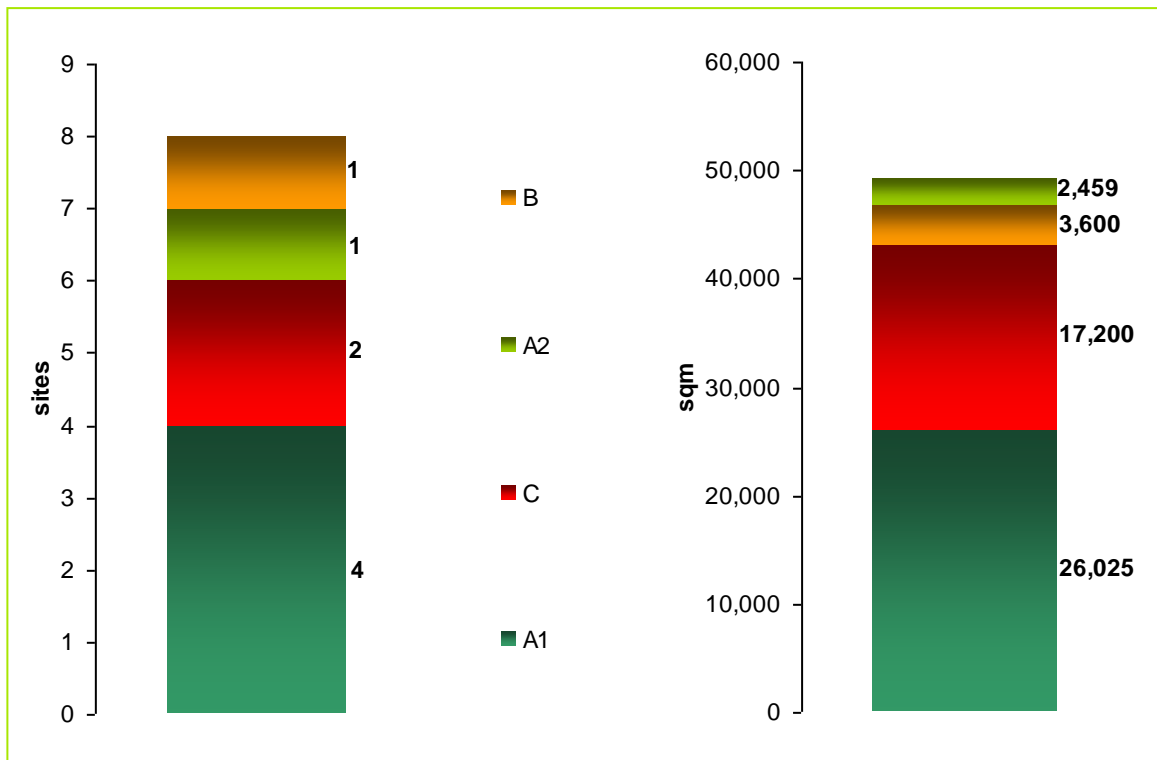
According to Valuation Office Agency 2012 data and the whole district definition (East Hampshire, Test Valley and Winchester) there were around 9,750 hereditaments, split: Industrial (3,780, 39%); Office (2,500, 26%); Retail (2,380, 24%); and Other (1,090, 11%). Total floorspace for the three districts was around 3.3m<sup>2</sup>, with close to three fifths (2.0 m<sup>2</sup>) attributable to industrial use.

Offices in the Central Hampshire market area are priced slightly lower than the LEP average at about £15.50/sq ft pa, although there are significant variations around the average (especially for offices), with actual rent payable depending on concessions (e.g. rent free periods). In all areas, rents per sq ft vary according to the size of the property (e.g. a very small office suite is being marketed at over £40/sq ft pa). The average quoting rent for industrial property of £6.60/sq ft is about 14% lower on average than the LEP area as a whole, although there are examples of units at each end of the price range which come close to other market areas.

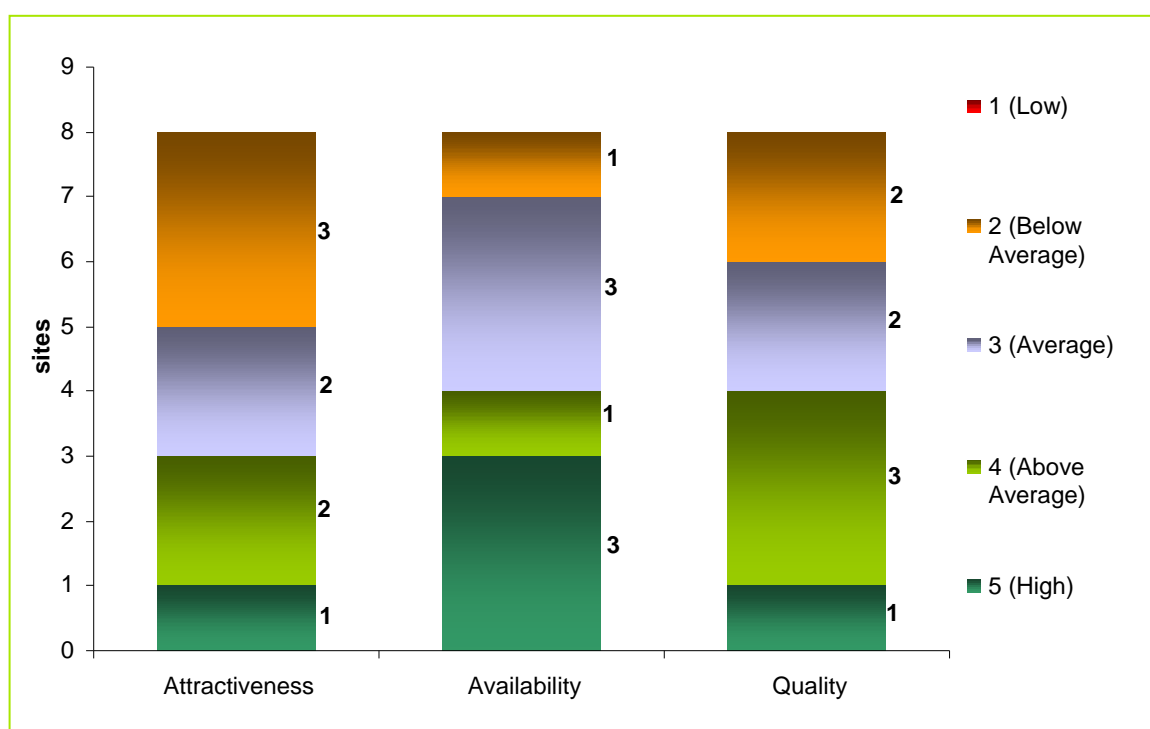
**Central Hampshire Sites and Floorspace (sqm) by Market Segment**



**Central Hampshire Sites and Floorspace (sqm) by Development Potential**



### Central Hampshire Sites by the Individual Indicators



### Central Hampshire Area Site Statistics

The Central Hampshire area has eight sites covering around 49,000 sqm of floorspace. There were no new sites and from the previous HEP site assessment study back in 2010, one site change of use (Alton HWRC site) suggesting little activity in the last two years.

#### Market Segment

- Only two segments, consisting of Established or potential office locations (five sites), and General business and industrial areas (three sites).
- Floorspace reflects the number of sites, with around 30,000 and 19,000 sqm of floorspace respectively.

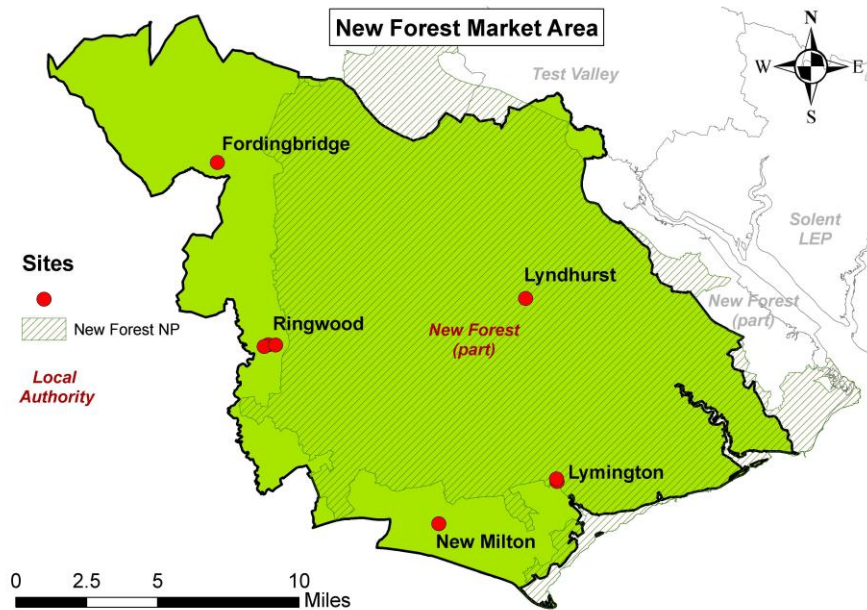
#### Development Potential

- Half the sites are A1 sites, and with approximately 26,000 sqm or 53% of floorspace. There is a single A2 site with 2,459 sqm of total floorspace.
- Two C and one C assessed developments come with 17,200 sqm and 3,600 sqm of total floorspace respectively.

#### Individual Indicators

- Availability was the strongest of the three individual indicators in Central Hampshire, with half the sites scoring higher than average.
- Site Quality saw four sites with Above average and High scores, whilst Attractiveness was marginally lower with three sites.

## Appendix 1: The New Forest Pen Portrait



### Description

The New Forest is the smallest of the six Enterprise M3 market areas, covering the New Forest District, minus the eastern Waterside area that comes under the Solent LEP. Much of the hinterland sits within the New Forest National Park, while the main employment centres are market towns along the coast at Lymington and New Milton, inland at Fordingbridge and Ringwood, and at Brockenhurst and Lyndhurst within the National Park.

There are no major business parks in the market area, but a number of smaller locations such as: Ampress Park (Lymington), Stag Business Park (Ringwood) and Wick/Gore Road Industrial Park (New Milton). Larger private sector employers include Colten Care and Dean and Dyball Civil Engineering. There is a very strong private sector employee presence in tourism related sectors as well as in the construction sector. The public sector is also major employer in the health sector. There were around 42,700 employees in 2011.

### Labour Market

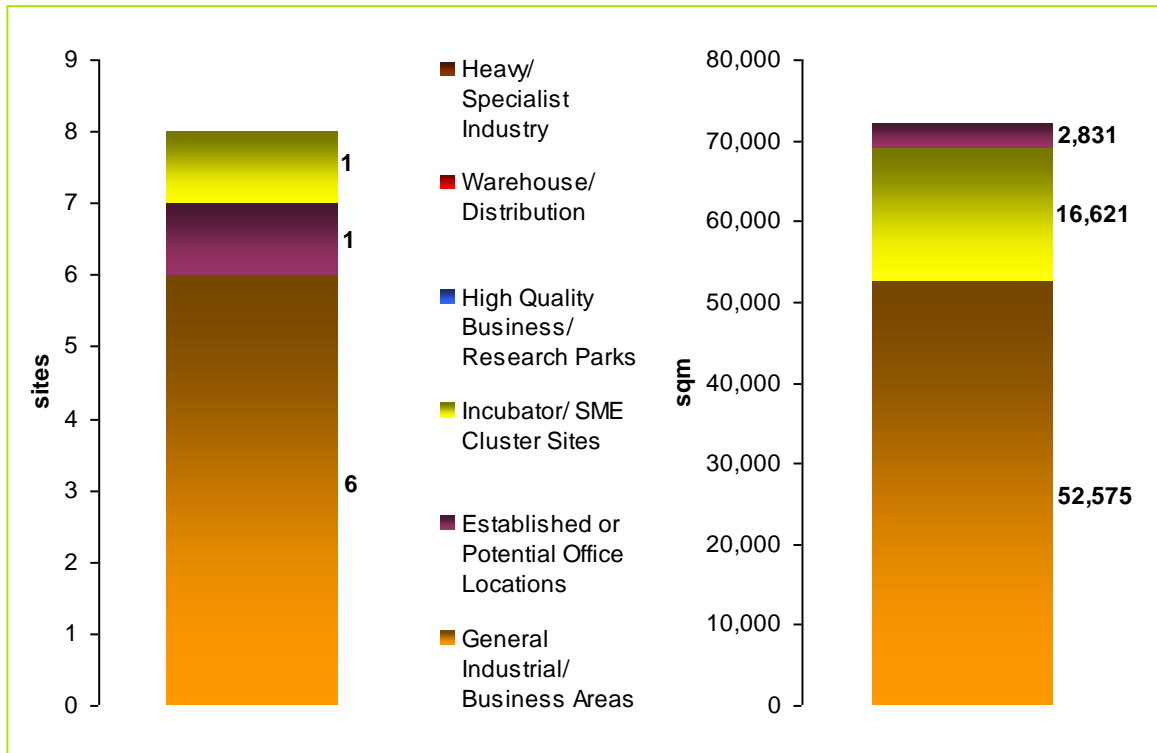
Employment rates are around 71% of the working age population in the New Forest, marginally above the England average of 70%, whilst unemployed jobseekers allowance rates were around two and a half times lower than the national average. The area has 79% of workers employed in the private sector, more than the England rate (77%). Around 29% of the workforce are qualified to degree or equivalent levels, which is low when compared to 38% nationally. Median average workplace earnings at £475 per week are below the England average of £510.

### Commercial sites, floorspace and average rents

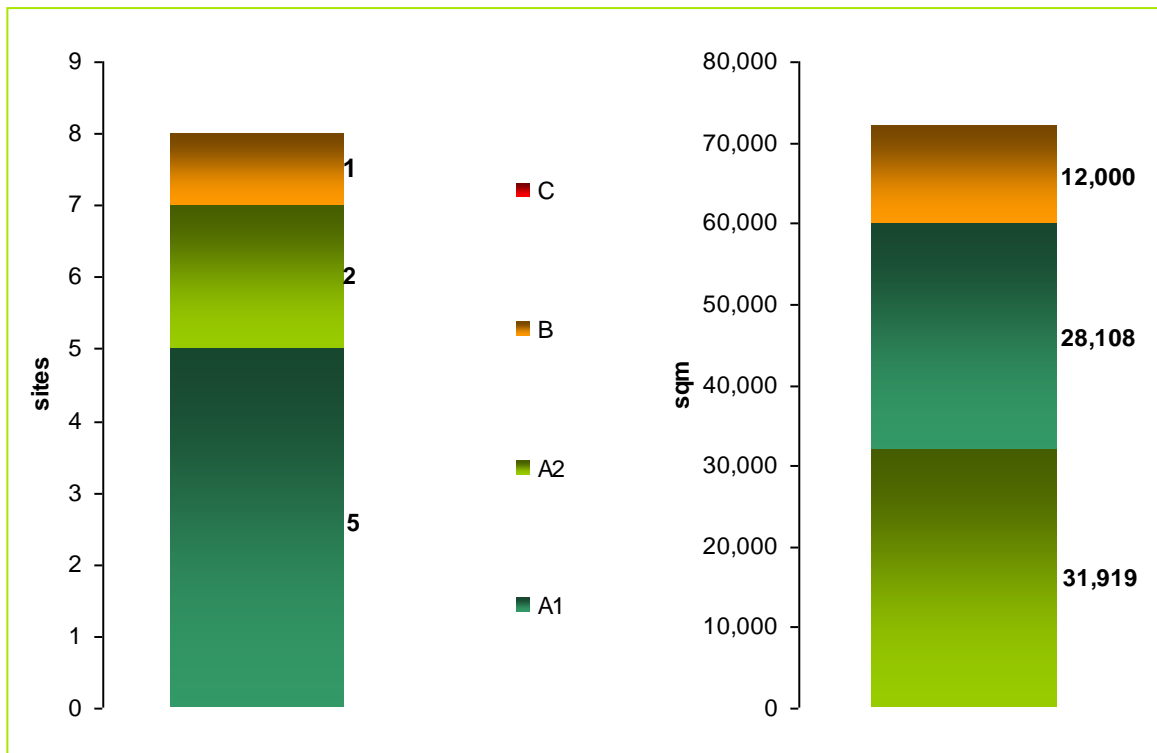
According to Valuation Office Agency 2012 data and the whole district definition (New Forest) there were around 9,750 hereditaments, split: Retail (1,740, 39%); Industrial (1,320, 29%); Office (790, 18%); and Other (650, 14%). Total floorspace for the whole district was around 1.2m<sup>2</sup>, with just over half (0.6 m<sup>2</sup>) attributable to industrial use.

Office rents in the New Forest are amongst the lowest of the group at just under £12/sq ft pa. However, in common with all areas, office space can be acquired for less. However, developers will struggle to build new, prime quality office space for less than £20/sq ft; some commentators quote a higher threshold depending on the specification of the building (and land cost). Where new construction is required, either to meet a property requirement or a policy aspiration, rental growth or subsidy is generally required throughout most parts of the LEP. In terms of industrial property, the New Forest market area has similarities to Central Hampshire with a wide range of industrial rents around an average of about £6.50/sq ft pa.

### New Forest Sites and Floorspace (sqm) by Market Segment

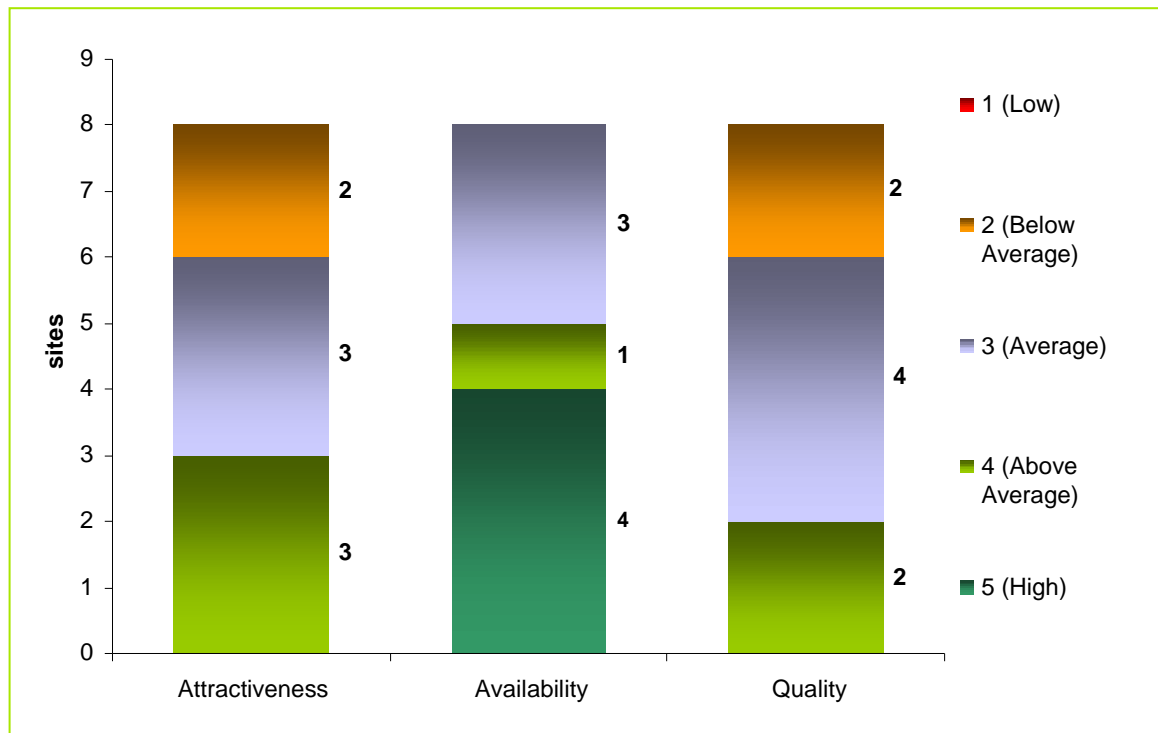


### New Forest Sites and Floorspace (sqm) by Development Potential





### New Forest Sites by the Individual Indicators



### The New Forest Market Area Site Statistics

The New Forest market area has eight sites covering around 72,000 sqm of floorspace. There was just one new site in the New Forest from the previous HEP site assessment study back in 2010.

#### Market Segment

- General business and industrial areas make up six of the eight sites, with one Established or potential office site and one Incubator/SME Cluster.
- Floorspace reflects the number of sites, with around 52,500 sqm of General industrial and office areas (73%), and 16,621 sqm of Incubator/SME and 2,831 sqm of Established or potential office floorspace.

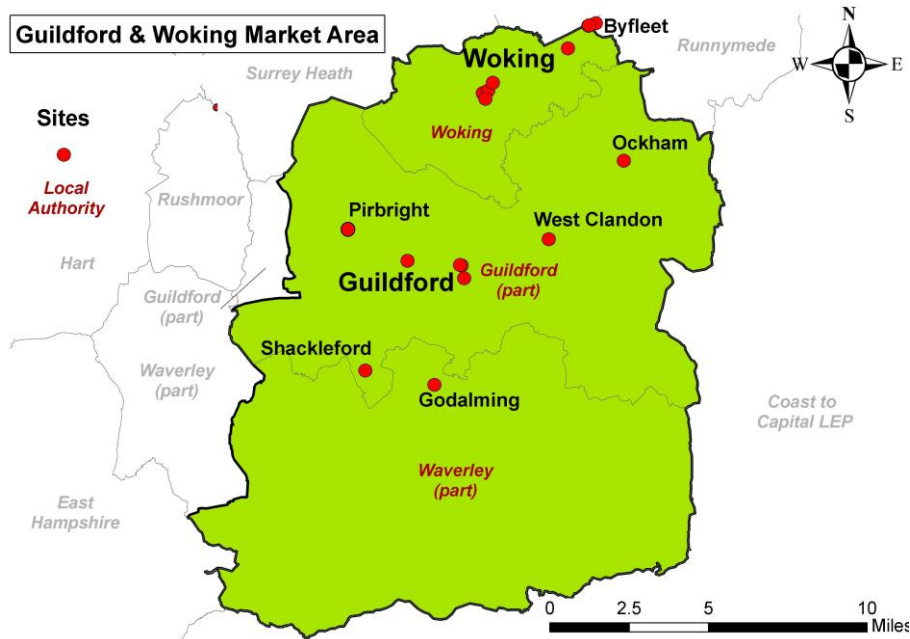
#### Development Potential

- Just over half the sites are A1, with two A2 sites. Combined, A1 and A2 account for around 60,000 sqm of floorspace, or 83% of total floorspace. Just over half the 60,000 sqm is A2
- There is a single B assessed development with 12,000 sqm of total floorspace.

#### Individual Indicators

- Availability was the strongest of the three individual indicators in the New Forest, with over half the sites scoring higher than average, and none lower than average.
- Attractiveness and Site Quality failed to achieve a High score, but the former was marginally higher than Site Quality with three sites scored Above average. Both had two sites scoring Below average.

## Appendix 1: Guildford and Woking Pen Portrait



### Description

The Guildford and Woking market area covers the local authority district of Woking in its entirety, as well as most of Guildford and the central and eastern part of Waverley. It covers a large rural area, including the North Downs. Major employment centres exist in Guildford and Woking, and a number of smaller centres such as Cranleigh, Godalming and Haslemere.

There are a number of large business parks in the market area including Dunsfold Park near Cranleigh (home to the BBC's Top Gear), The Surrey Research Park and the Woking Business Park, as well as numerous smaller business parks. Major employers in the market area include: Allianz Cornhill Insurance, Cranleigh Freight, Detica Limited, McLaren Group and Triad Group. There is a very strong private sector employee presence in Information and Communications and in the Business Administration and Support Services sectors. Tourism is also an important employer. The public sector is a major employer, particularly in the education and health sectors. There were around 143,700 employees in 2011.

### Labour Market

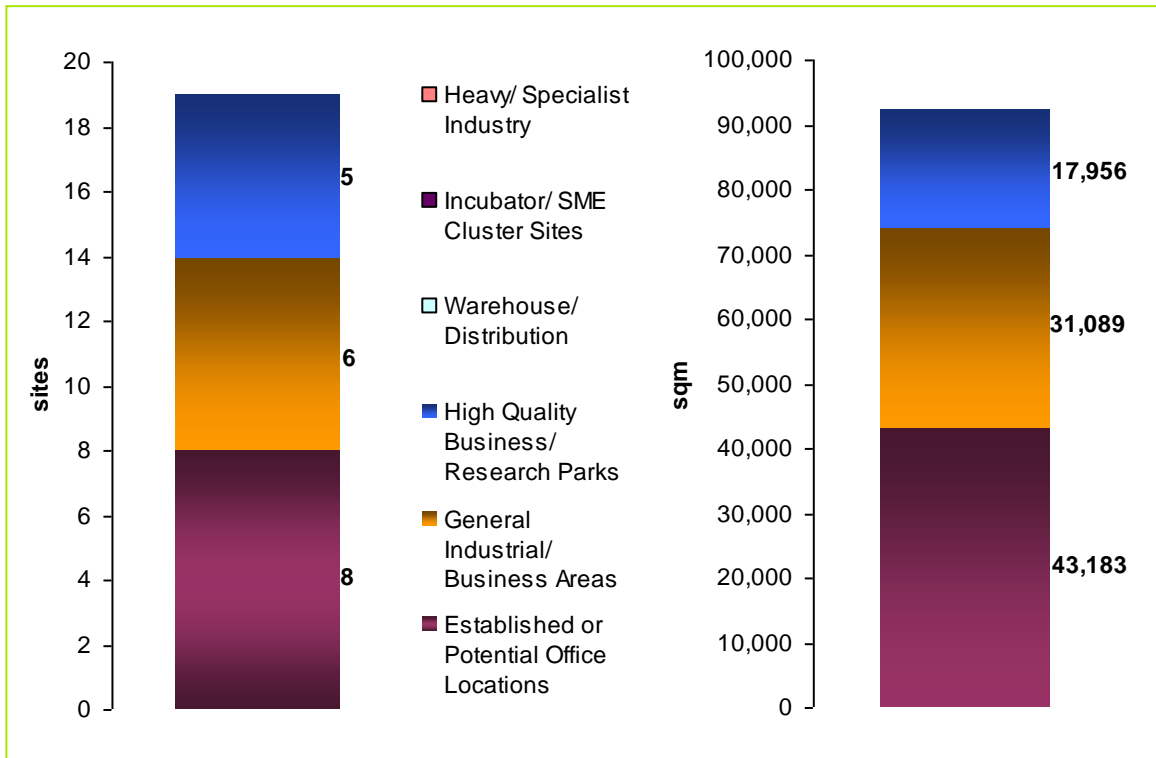
Average employment rates are around 79% of the working age population, well above the England average of 70%, whilst unemployed jobseekers allowance rates were around two and a half times lower than the national average. The area has 78% of workers employed in the private sector, marginally more than the England rate (77%). Around 49% of the workforce are qualified to degree or equivalent levels, compared to 38% nationally. The market area is home to the University of Surrey at Guildford and Surrey Research Park. Median average workplace earnings at £510 per week are in line with the England average (£510), although there are large difference between Guildford (£570) and Woking (£465).

### Commercial site, floorspace and average rents

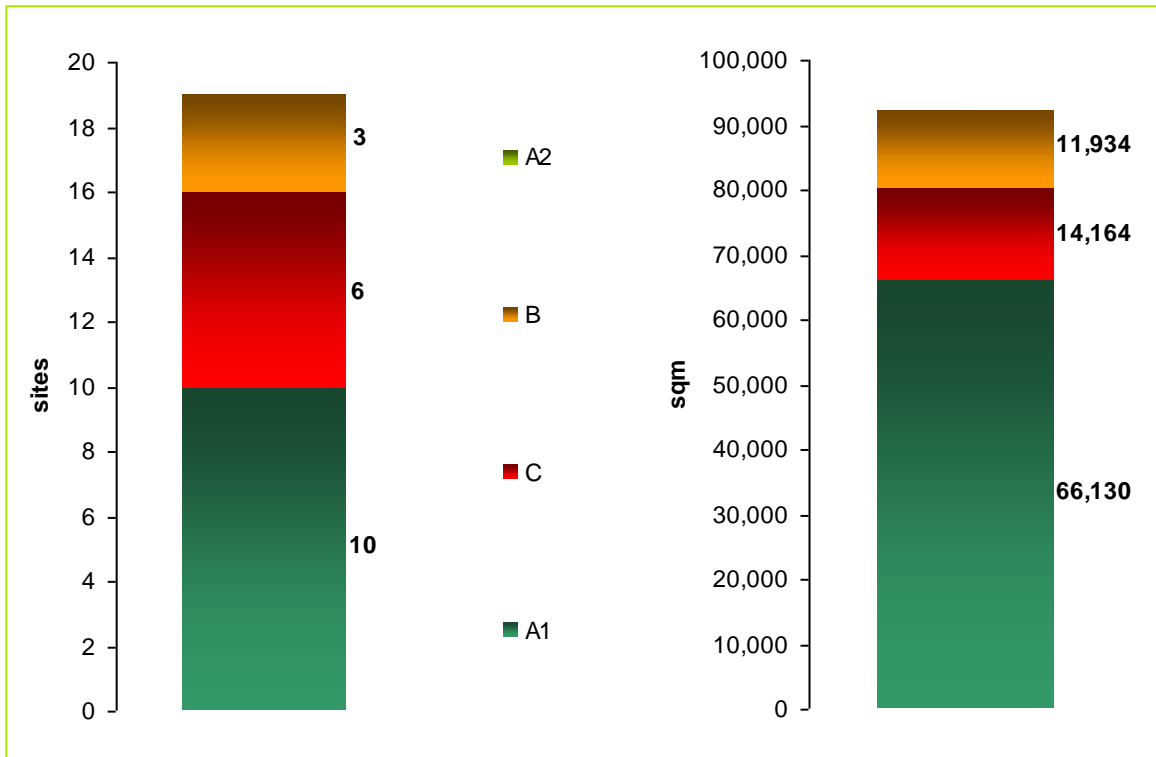
According to Valuation Office Agency 2012 data and the whole district definition (Guildford, Waverley and Woking) there were around 9,300 hereditaments, split: Office (3,210, 35%); Retail (3,110, 31%); Industrial (1,940, 21%); and Other (1,040, 11%). Total floorspace for the three districts was around 2.7m<sup>2</sup>, with just over one third (0.9 m<sup>2</sup>) attributable to industrial use.

Office rents in Guildford & Woking are about 12% higher than the LEP average at circa £18/sq ft pa. However there are examples of rents being quoted well above and below this range. Industrial units in Guildford & Woking command amongst the highest rents in the Enterprise M3 LEP area at almost £9.00/sq ft pa on average.

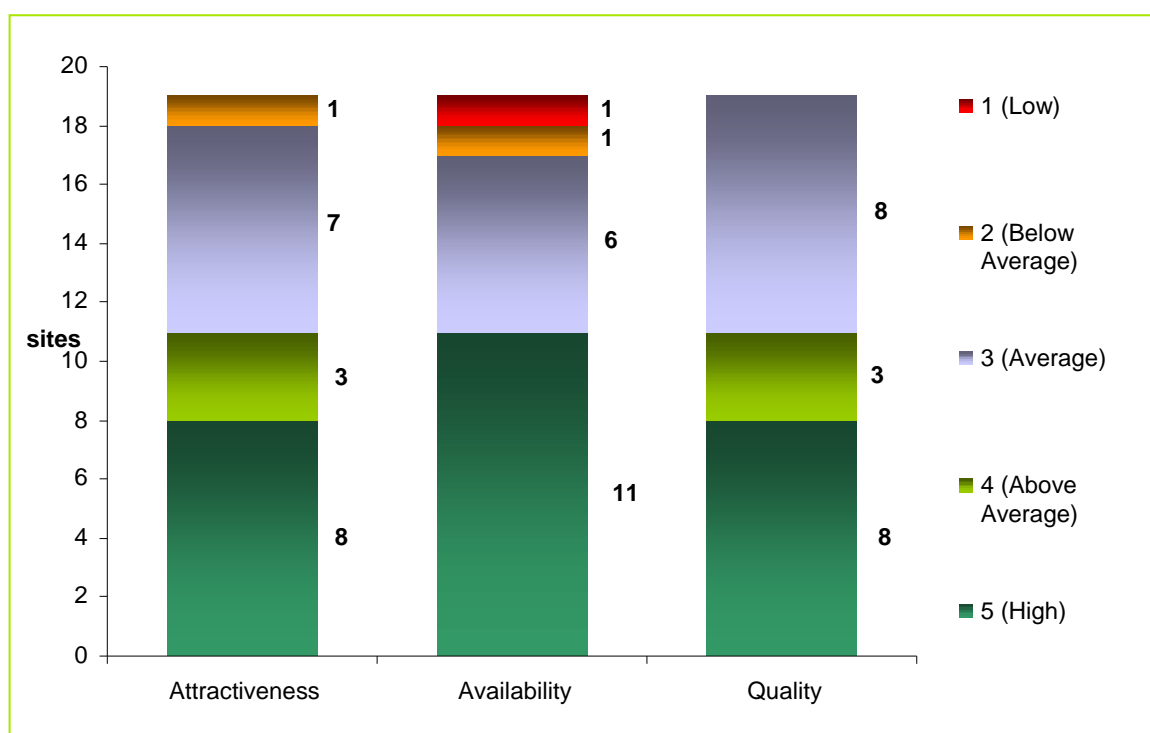
### Guildford and Woking Sites and Floorspace (sqm) by Market Segment



### Guildford and Woking Sites and Floorspace (sqm) by Development Potential



### Guildford and Woking Sites by the Individual Indicators



### Guildford and Woking Area Site Statistics

The Guildford and Woking market area has 19 sites covering around 92,000 sqm of floorspace. The Surrey based sites are all new in respect to the 2012 study.

#### Market Segment

- Three market segments comprising eight Established or potential office sites, six General industrial/office and five High Quality Modern Business/Research Park sites (Surrey Research Park).
- Floorspace reflects the number of sites, with 43,183 sqm of Established or potential office (47%), 31,089 sqm of General industrial/office and 17,956 sqm of High Quality Modern Business/Research Park floorspace.

#### Development Potential

- Just over half the sites are A1, representing just under three quarters of the floorspace (66,130 sqm, 72%). There are no A2 sites.
- Around one third of sites are C, representing 14,164sqm of floorspace. There are three B assessed developments with 11,934 sqm of total floorspace.

#### Individual Indicators

- Availability was the strongest of the three individual indicators in Guildford and Woking, with over half the sites scoring higher than average, and two lower than average.
- Attractiveness and Site Quality more or less share the same profile, with site scores mostly High or Above average.

## Appendix 1: Upper M3 Pen Portrait



### Description

The Upper M3 market area covers the local authority districts of Elmbridge, Runnymede and Spelthorne in their entirety. Unlike the other Enterprise M3 market areas, it is mostly urbanised with major employment centres in Chertsey, Egham, Esher, Staines and Weybridge. The area is adjacent to Heathrow Airport and is served by both the M3 and M25.

There are a number of large business parks in the market area, including: Bourne Business Park (Addlestone), Hillswood (Chertsey), The Causeway (Egham), Watermans (Staines) and Weybridge and Brooklands, as well as numerous smaller business parks. Major private sector employers include: Air Products PLC, BP International, Centrica, Gartner UK Ltd, Proctor and Gamble, and Sony (UK). There is a very strong private sector employee presence in the Information and Communications sector, as well as in Utilities, Professional, Scientific and Technical and Wholesale sectors. The public sector is also a major employer in the education and health sector. There were around 142,700 employees in 2011.

### Labour Market

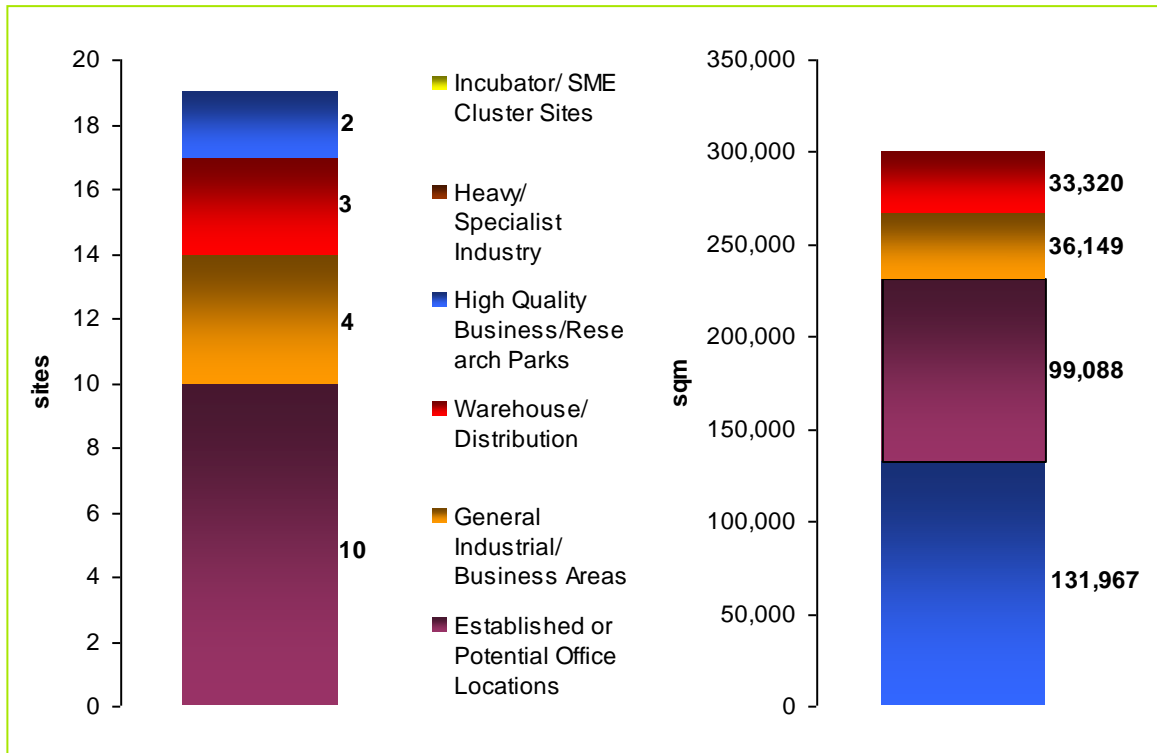
Average employment rates are around 75% of the working age population, above the England average of 70%, whilst unemployed jobseekers allowance rates are two and a half time lower than the national average. The market area has the highest proportions of workers employed in the private sector in the Enterprise M3 LEP at 84%, which is well above the England rate (77%). Almost half the workforce (48%) are also qualified to degree or equivalent levels, compared to 38% nationally. The market area is home to the Royal Holloway (University of London) at Egham. Median average workplace earnings at £600 per week are much higher than the England average of £510, reflecting the close proximity to London.

### Commercial site, floorspace and average rents

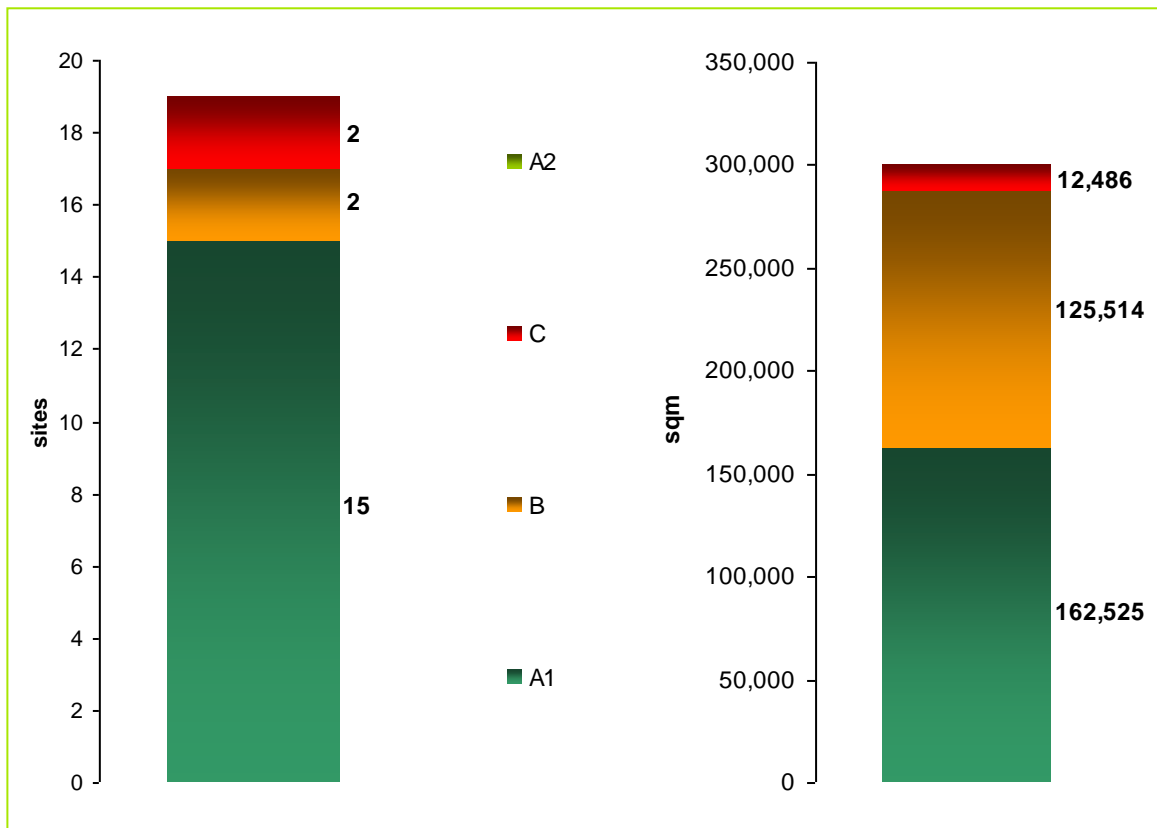
According to Valuation Office Agency 2012 data and the whole district definition (Elmbridge, Runnymede and Spelthorne) there were around 7,000 hereditaments, split: Retail (2,720, 38%); Office (2,190, 31%); Industrial (1,460, 21%); and Other (700, 10%). Total floorspace for the three districts was around 2.5m<sup>2</sup>, with around 35% (0.9 m<sup>2</sup>) attributable to industrial use.

The Upper M3 has office rents being quoted between £6.50 and £35/sq ft pa; the average is just over £19.00. Market feedback from the Enterprise M3 Land & Property Action Group is that rents on prime offices here are certainly sufficient to warrant office development (subject to land costs and detailed appraisals). The Upper M3 area has examples of industrial units on the market at an average quoting rent of about £8.50/sq ft pa (about 10% or 11% higher than the LEP average). Surrey appears to command a premium for office rents of up to 35% over Hampshire. Similarly, quoting rents for industrial property in Surrey are, on average, about 25% higher than in Hampshire. Figures will vary from property to property.

### Upper M3 Sites and Floorspace (sqm) by Market Segment

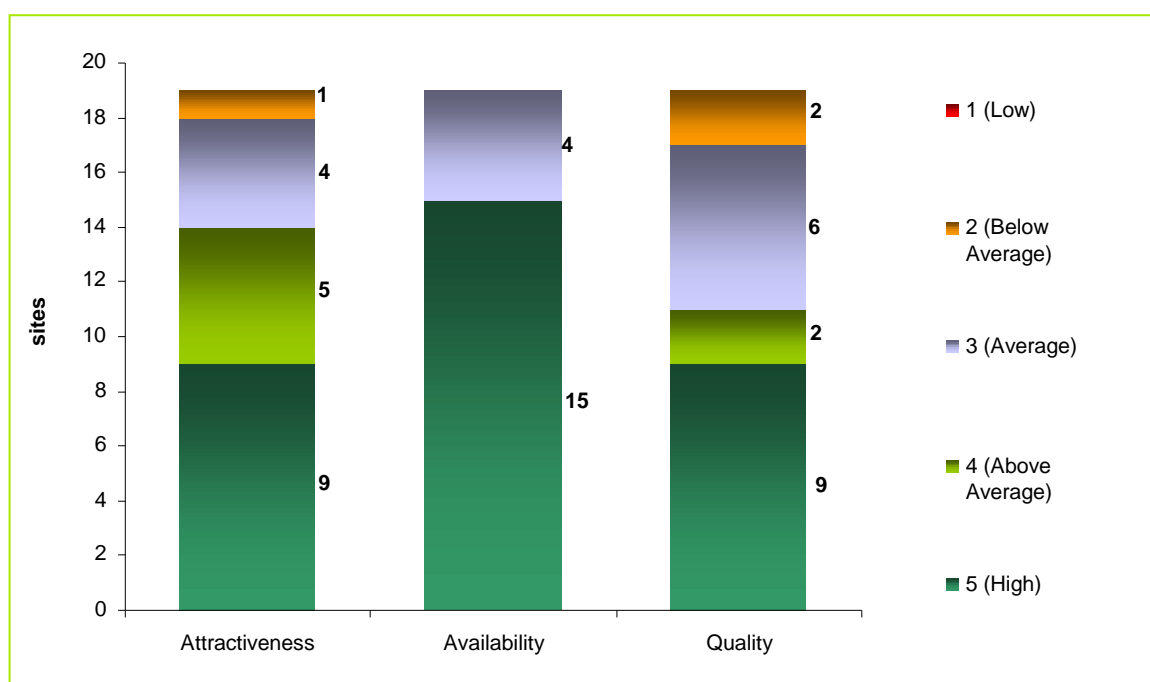


### Upper M3 Sites and Floorspace (sqm) by Development Potential





### Upper M3 Sites by the Individual Indicators



### Upper M3 Area Site Statistics

The Upper M3 market area has 19 sites covering around 300,500 sqm of floorspace. The Surrey based sites are all new in respect to the 2012 study.

#### Market Segment

- There are 10 Established or potential office sites, with four General industrial/office sites, three Warehouse/distribution sites and two High Quality Modern Business/Research Park sites.
- Floorspace reflects both the number of sites and the market segments, with High Quality Modern Business/Research Park offering 131,967 sqm ( 44%) of floorspace.

#### Development Potential

- Close to four fifths (79%) of sites are A1, representing just over half the floorspace (166,525 sqm, 54%). There are no A2 sites.
- There are two B and two C sites, but representing very different amounts of floorspace. The B sites cover 125,514sqm (42%) of floorspace, compared to 12,486 sqm (4%) of C floorspace.

#### Individual Indicators

- Availability was the strongest of the three individual indicators in the Upper M3, with 79% sites scoring High. No sites scored lower than average.
- Attractiveness had a stronger profile, with 14 sites scoring High or Above average, than Site Quality which saw 11 sites scoring High or Above average. Just one site under Attractiveness and two under Site Quality scored Below average.

## Appendix 2: List of Sites in Assessment

Site Ref	Site Address	Proposed Development	Market Area	Use Class	Floor-space (sqm)	Market Segment	Development Potential
9	Andover Business Park, Monxton Road, Andover	B1/B8 Development, residual floorspace after deducting CO-OP and Stannah consents	Basingstoke & Andover	B1-8	72,342	4	A1
78	Hampshire International Business Park, Crockford Lane, Chineham	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	16,840	2	A1
74	Larchwood, Crockford Lane, Chineham	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	12,360	2	A1
56	Land at Gresley Road, Basingstoke	Local Plan Allocation for Employment Uses	Basingstoke & Andover	B1-8	11,840	4	A1
55	Kennel Farm, Beggarwood Lane, Kempshott Park, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	9,680	1	A1
73	Redwood, Crockford Lane, Chineham	B1 Office development	Basingstoke & Andover	B1a	6,052	2	A1
75	Spindlewood, Crockford Lane, Chineham	Three Storey B1 Office Development	Basingstoke & Andover	B1a	4,222	2	A1
72	Elderwood, Crockford Land, Chineham	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	2,560	2	A1
98	Land at Harwood Paddock, Woolton Hill	Five B1 Business Units	Basingstoke & Andover	B1a	2,240	4	A1
232	Land at the Quadrant, Crockford Lane, Chineham	Two storey office building	Basingstoke & Andover	B1a	2,000	2	A1
66	Site 16, opposite Mountbatten House, Basing View, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	8,800	1	A2
68	East of Jays Close, Viabes Business Park, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	6,080	1	A2
69	Jays Close, Viabes Business Park, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a	4,800	1	A2
65	Number One Basing View, Old Reading Rd, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	3,600	1	A2
67	Gateway Site, Basing View, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	3,240	1	A2
271	Loddon House, Basing View, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	2,640	1	A2
62	Land at Jays Close, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	2,600	1	A2
270	City Wall House, Basing View, Basingstoke	Local Plan Allocation for B1 Use	Basingstoke & Andover	B1a/b	1,960	1	A2
10	Land at Walworth Business Park, Walworth Road, Picket Piece, Andover	Local Plan employment allocation	Basingstoke & Andover	B1-8	44,000	4	B
218	Land north of Ardglen Road, Whitchurch	B1/B2/B8 Development	Basingstoke & Andover	B1-8	16,000	4	B
18	Plot 89, Walworth Business Park, Andover	Vacant site	Basingstoke & Andover	B1-8	7,600	4	B

19	Plot 73, Columbus Way, Walworth Business Park, Andover	Vacant site	Basingstoke & Andover	B8	2,760	4	B
239	Poultry Sheds, Monxton Road, Grateley	Change of use from Farm to Offices	Basingstoke & Andover	B1a	1,350	6	B
17	Plot 50, South Way, Walworth Business Park, Andover	Warehouse and ancillary offices	Basingstoke & Andover	B8	1,208	3	B
273	Kempshott Park Industrial Estate, Longwood Copse Lane, Basingstoke	Commercial units as part of mixed use scheme	Basingstoke & Andover	B1a/c	2,740	4	C
83	Land at Pyestock, North Ively Road, Farnborough	Industrial and Warehouse development	Blackwater Valley	B1-8	133,414	3	A1
220	Land north of Old Ively Road, Farnborough	B1c, B2, B8 Business Park and two Data Centres	Blackwater Valley	B1-8	44,960	2	A1
43(s)	Home Park, BAe Systems Site, Lyon Way, Frimley	5 Office Buildings	Blackwater Valley	B1a	32,515	1	A1
85	The Enclave, Aerospace Boulevard, Farnborough	B1 Development	Blackwater Valley	B1	25,099	2	A1
84	Farnborough Business Park, Farnborough Airfield, Farnborough	Redevelopment of former DERA factory site for B1a, B1b, B1c	Blackwater Valley	B1-8	21,030	2	A1
89	Plots 300-380 Farnborough Business Park, Farnborough	B1 Development	Blackwater Valley	B1C	20,600	2	A1
88	Plots 40, 50 and 60 Farnborough Business Park, Farnborough	Three Office buildings	Blackwater Valley	B1a	20,110	2	A1
274	Guillemont Park, Milney Road, Blackwater	B1 Development, remaining phase	Blackwater Valley	B1	13,000	1	A1
222	Unit 100, Frimley Business Park, Farnborough	Redevelopment for replacement Office building	Blackwater Valley	B1a	4,030	1	A1
272	110-180 Frimley Business Park, Farnborough	Redevelopment and erection of two 3-storey Office buildings	Blackwater Valley	B1a	3,618	1	A1
219	Brickyard Plantation, Pale Lane, Elvetham	Four B1 Office Units	Blackwater Valley	B1a	3,496	1	A1
80	Land adjacent to Redfield Industrial Estate, Redfields Lane, Church Crookham	B1 and B2 Industrial development	Blackwater Valley	B1-8	2,041	4	A1
235	Beech House and Cedar House, Ancells Road, Fleet	Office extensions	Blackwater Valley	B1a	1,951	1	A1
52(s)	Plot 5, Coxbridge Business Park, Endeavour Place	Light industrial unit	Blackwater Valley	B1c	1,394	4	A1
137	Unit 72, Hawley Lane, Farnborough	Redevelopment for 30 B1c, B2, B8 Units	Blackwater Valley	B1-8	8,732	4	A2
90(s)	Land between Blackwater Valley Road (A331) and Camberley Sewage Treatment Works, Camberley	Possible Site Allocation	Blackwater Valley	B1a, B2, B8	13,000	4	B
275	Queen Elizabeth Barracks, Sandy Lane, Church Crookham	B1 Employment floorspace	Blackwater Valley	B1	7,500	4	B

234	Land at Sandhurst Road, Yateley	B1 Business and leisure development	Blackwater Valley	B1	6,600	1	B
223	Aldershot Urban Extension, Aldershot	Allocation of MoD land for Mixed Uses, including Commercial	Blackwater Valley	B1-8	2,500	4	B
107 (s)	The Old Sand Pit, River Lane, Farnham	Medium/Long Term Opportunity Land	Blackwater Valley	B2, B8	2,065	5	B
87	Queens Gate, Government House Road, Farnborough	Redevelopment for employment uses	Blackwater Valley	B1-8	4,134	4	C
106 (s)	Weydon Works, Weydon Lane, Farnham	Medium/Long Term Opportunity Land	Blackwater Valley	B1a/b/c, B8, Sui Generis	2,489	4	C
41	East of Caird Avenue, Lower Ashley, New Milton	Mixed development including 10,192 sqm of B1 and 6,430 sqm of B2	Central Hampshire & New Forest	B1-8	16,621	6	A1
42	Buckmore Farm A272, Petersfield	Local Plan Allocation for B1a/b	Central Hampshire & New Forest	B1a	8,720	1	A1
241	Chilcomb Centre, Chilcomb Lane, Chilcomb	Redevelopment for Business and Innovation Centre	Central Hampshire & New Forest	B1-8	8,270	4	A1
21	Woolmer Trading Estate, south of Woolmer Way, Bordon	Employment and leisure development	Central Hampshire & New Forest	B1-8	7,300	4	A1
44	Embankment Way and Pullman Way, Ringwood	Industrial, Office, Warehouse development	Central Hampshire & New Forest	B1-8	3,444	4	A1
34	Plot D6 Ampress Park, Lymington	Ten Industrial units (B1, B2, B8 use)	Central Hampshire & New Forest	B1-8	2,932	4	A1
278	Former AI Centre, Beechen Lane, Lyndhurst	Redevelopment including Offices	Central Hampshire & New Forest	B1	2,831	1	A1
39	Plot J1, J2 Ampress Park, Lymington	Industrial development	Central Hampshire & New Forest	B1-8	2,280	4	A1
24	Mansfield Business Park, Station Approach, Four Marks	16 Business Units B1 - not built phase	Central Hampshire & New Forest	B1a	1,735	1	A1
45	Christchurch Road, Ringwood	Industrial allocation	Central Hampshire & New Forest	B1-8	28,120	4	A2
47	Land north and west of Sandleheath Industrial Estate, Old Brickyard Road, Sandleheath	B1/B2/B8 Development	Central Hampshire & New Forest	B1-8	3,799	4	A2
201	Silver Hill, Winchester	Mixed development including offices and live-work units	Central Hampshire & New Forest	B1a	2,459	1	A2
46	Land west of Crow Lane, Ringwood	Allocation for B1, B2, B8 Uses (Reserve site)	Central Hampshire & New Forest	B1-8	12,000	4	B
48	Former Station Yard, Sutton Scotney	Industrial allocation	Central Hampshire & New Forest	B1C	3,600	4	B
1	Treloars Hospital, Alton	Redevelopment, mixed premises including B1a and B1b	Central Hampshire & New Forest	B1a	12,000	1	C
20	Site near High Street, Chalet Hill, Somerset Avenue and Devon Road in Bordon	Redevelopment of land for commercial retail and offices	Central Hampshire & New Forest	B1a	5,200	1	C
4(s)	Ph2, Henley Park, Pirbright Road, Normandy, Guildford	6 high-office content 2-storey industrial units	Guildford and Woking	B1a/c, B2	19,625	4	A1

60(s)	Altura, 9/13 Victoria Way, Woking	18 storey building with small amount of A and D1 use	Guildford and Woking	B1a	16,719	1	A1
62(s)	Broadoaks, Parvis Road (buildings A&B), West Byfleet	Office/data centre development (building C completed but not fitted out)	Guildford and Woking	B1a/b	9,222	2	A1
6(s)	Burymead House, Guildford Plaza, Portsmouth Road, Guildford	Two linked office buildings	Guildford and Woking	B1a	6,875	1	A1
65(s)	121 Chertsey Road, Woking	office redevelopment	Guildford and Woking	B1a	3,493	1	A1
10(s)	Building A, Faraday Court, Surrey Research Park Phase 11, Guildford	office development	Guildford and Woking	B1a/b	2,828	2	A1
9(s)	George Stephenson Road, Surrey Research Park Phase 12, Guildford	R&D building	Guildford and Woking	B1c	2,080	2	A1
11(s)	Building B, Faraday Court, Surrey Research Park Phase 11, Guildford	Remainder of Ph11	Guildford and Woking	B1a/b	1,950	2	A1
12(s)	Building B, George Stephenson Place, Surrey Research Park Phase 12, Guildford	Office/R&D building	Guildford and Woking	B1a/b	1,876	2	A1
67(s)	Land at Dorset Way (adjacent Unit 5) Byfleet	2-storey industrial units	Guildford and Woking	B1c, B2	1,462	4	A1
63(s)	Woking Gateway/Chertsey Street/Cawsey Way/High Street/Commercial Way, Woking	Mixed use redevelopment inc.offices. Floorspace figure is indicative. Site currently occupied.	Guildford and Woking	B1a	9,000	1	B
56(s)	Langham Park, Cattershall Lane, Godalming	Mixed development including 5 office buildings & light ind unit	Guildford and Woking	B1a/c	1,675	4	B
16(s)	Clandon Park, A247, West Clandon	Redevelopment of agricultural bldgs to provide offices and medical facility	Guildford and Woking	B1a/b	1,259	4	B
54(s)	Cooper Clarke Site, Cattershall Lane, Godalming	Production/Distribution unit	Guildford and Woking	B1c, B2, B8	4,968	4	C
7(s)	Pembroke House, Mary Road, Guildford	Two/three storey office development	Guildford and Woking	B1a	3,271	1	C
58(s)	Shackleford Road (Federal Mogul own use), Shackleford	Extension to industrial unit	Guildford and Woking	B1c, B2	2,100	4	C
66(s)	Sandringham House, Guildford Road, Woking	Office/residential redevelopment	Guildford and Woking	B1a	1,667	1	C
70(s)	Grosvenor Court, Hipley Street, Phase 2, Woking	2 office units	Guildford and Woking	B1a	1,115	1	C
88(s)	77-83 Walnut Tree Close, Guildford	Not stated as at template return	Guildford and Woking	B1	1,044	1	C
32(s)	Majestic House, 122/140 High Street, Staines	Mixed use development including offices	Upper M3	B1a	29,603	1	A1
33(s)	Staines Central, 17/51 London Rd, Staines	Mixed use development including offices	Upper M3	B1a	23,225	1	A1
34(s)	Blackburn Trading Estate & Court Farm Trading Estate, Northumberland Close, Stanwell	Redevelopment for 4 Production/ Distribution units	Upper M3	B8	22,240	3	A1

23(s)	Ph2, Aviator Park, Station Road , Addlestone	Redevelopment for commercial use	Upper M3	B1a	18,533	2	A1
24(s)	Opus 1, Lovett Road (north of Lovett Road), Staines	4-storey offices	Upper M3	B1a	10,150	1	A1
26(s)	Phase 3 , Delta, The Bourne Business Park, Addlestone Road, Addlestone	2 linked office buildings	Upper M3	B1a	9,410	1	A1
73(s)	Southern Section, Molesey Industrial Estate, West Molesey	N/A	Upper M3	B1, B2, B8	9,160	3	A1
3(s)	Walton Court, Station Avenue, Walton on Thames	3-storey extension to office building	Upper M3	B1a	7,814	4	A1
109(s)	Buildings 3 & 4 Lotus Park, The Causeway , Staines	Office extension	Upper M3	B1a	7,457	1	A1
25(s)	Opus 3, Lovett Road (south of Lovett Road) Former Reservoir site, Staines	4-storey offices (GIFA)	Upper M3	B1a	5,853	1	A1
27(s)	Unit 5, Pine Trees Business Park, Chertsey Lane, Staines	Redevelopment for 4-storey office building (GIFA)	Upper M3	B1a	5,582	1	A1
36(s)	Ph2, Mentone Farm, S. of Bedfont Road, Stanwell	Warehouse development	Upper M3	B8	5,295	4	A1
29(s)	Parklands, Bittams Lane, Chertsey	4-storey office building	Upper M3	B1a	4,832	1	A1
75(s)	Lyon Road - Hersham Trading Estate & Ember Centre, Hersham	N/A	Upper M3	B1, B2, B8, SG	1,920	3	A1
41(s)	5A/7 Fairfield Avenue, Staines	Redevelopment to provide 4-storey office building	Upper M3	B1a	1,450	1	A1
21(s)	DERA Site, Chobham Lane, Longcross	Business park development	Upper M3	B1a	113,434	2	B
74(s)	Imber Court Trading Estate, East Molesey	N/A	Upper M3	B2, B8	12,080	4	B
78(s)	GlaxoSmithKline, Weybridge	N/A	Upper M3	B1	10,960	4	C
30(s)	Hanover House, 1 Station Parade, Virginia Water	Office extension	Upper M3	B1a	1,526	1	C



## Appendix 3: Additional Site Assessment Analysis

**Table 3.1: Estimated Floorspace (sqm) by Market Segment and Development Potential**

<i>Market Segment/ Development Potential</i>	<i>A1</i>	<i>A2</i>	<i>B</i>	<i>C</i>	<i>Total Segment</i>
<i>Established or Potential Office Locations</i>	206,224	36,179	15,600	25,822	<b>283,826</b>
<i>High Quality Business/Research Parks</i>	212,322	zero	113,434	zero	<b>325,756</b>
<i>Warehouse/ Distribution</i>	166,734	zero	1,208	zero	<b>167,942</b>
<i>General Industrial/ Business Areas</i>	148,279	40,651	123,974	27,390	<b>340,294</b>
<i>Heavy/Specialist Industry</i>	zero	zero	2,065	zero	<b>2,065</b>
<i>Incubator/ SME Cluster Sites</i>	16,621	zero	1,350	zero	<b>17,971</b>
<b><i>Total Development Potential</i></b>	<b>750,181</b>	<b>76,830</b>	<b>257,631</b>	<b>53,213</b>	<b>1,137,854</b>

**Table 3.2: Site Floorspace (sqm) by Individual Indicator Scores**

<b>Indicator Score</b>	<b>Attractiveness</b>		<b>Availability</b>		<b>Site Quality</b>	
	<b>Floorspace (sqm)</b>	<b>% of total</b>	<b>Floorspace (sqm)</b>	<b>% of total</b>	<b>Floorspace (sqm)</b>	<b>% of total</b>
<b>5 (High)</b>	568,464	50.0	536,751	47.2	597,739	52.5
<b>4 (Above average)</b>	180,574	15.9	236,970	20.8	176,313	15.5
<b>3 (Average)</b>	299,201	26.3	264,891	23.3	271,701	23.9
<b>2 (Below average)</b>	84,376	7.4	68,590	6.0	89,362	7.9
<b>1 (Low)</b>	5,240	0.5	30,652	2.7	2,740	0.2
<b>Total</b>	<b>1,137,854</b>	<b>100.0</b>	<b>1,137,854</b>	<b>100.0</b>	<b>1,137,854</b>	<b>100.0</b>

**Table 3.3: Market Area Sites by Market Segments**

<i>Market Areas</i>	<i>Est. or Potential Office Locations</i>	<i>High Quality Business/ Research Parks</i>	<i>Warehouse/ Distribution</i>	<i>General Industrial/ Business Areas</i>	<i>Heavy/ Specialist Industry</i>	<i>Incubator/ SME Cluster Sites</i>	<i>Total M Area Sites</i>
<i>Basingstoke &amp; Andover</i>	9	6	1	8	zero	1	25
<i>Blackwater Valley</i>	7	5	1	8	1	zero	22
<i>C. Hampshire &amp; New Forest</i>	6	zero	zero	9	zero	1	16
<i>C. Hampshire</i>	5	zero	zero	3	zero	zero	8
<i>New Forest</i>	1	zero	zero	6	zero	1	8
<i>Guildford and Woking</i>	8	5	zero	6	zero	zero	19
<i>Upper M3</i>	10	2	3	4	zero	zero	19
<b><i>Total Segment</i></b>	<b>40</b>	<b>18</b>	<b>5</b>	<b>35</b>	<b>1</b>	<b>2</b>	<b>101</b>

**Table 3.4: Market Area Floorspace by Market Segments**

Market Areas	Est. or Potential Office Locations	High Quality Business/ Research Parks	Warehouse/ Distribution	General Industrial/ Business Areas	Heavy/ Specialist Industry	Incubator/ SME Cluster Sites	Total M. Area sqm
Basingstoke & Andover	43,400	44,034	1,208	159,522	zero	1,350	249,514
Blackwater Valley	65,210	131,799	133,414	41,789	2,065	zero	374,277
C. Hampshire & New Forest	32,945	zero	zero	71,745	zero	16,621	121,311
C. Hampshire	30,114	zero	zero	19,170	zero	zero	49,284
New Forest	2,831	zero	zero	52,575	zero	16,621	72,027
Guildford and Woking	43,183	17,956	zero	31,089	zero	zero	92,228
Upper M3	99,088	131,967	33,320	36,149	zero	zero	300,524
Total Segment	283,826	325,756	167,942	340,294	2,065	17,971	1,137,854

**Table 3.5: Market Area Sites by Development Potential**

Market Areas	A1	A2	B	C	Total M. Area Sites
Basingstoke & Andover	10	8	6	1	25
Blackwater Valley	14	1	5	2	22
C. Hampshire & New Forest	9	3	2	2	16
C. Hampshire	4	1	1	2	8
New Forest	5	2	1	zero	8
Guildford and Woking	10	zero	3	6	19
Upper M3	15	zero	2	2	19
Total Segment	58	12	18	13	101

**Table 3.6: Market Area Floorspace (sqm) by Development Potential**

Market Areas	A1	A2	B	C	Total M. Area sqm
Basingstoke & Andover	140,136	33,720	72,918	2,740	249,514
Blackwater Valley	327,258	8,732	31,665	6,623	374,277
C. Hampshire & New Forest	54,133	34,378	15,600	17,200	121,311
C. Hampshire	26,025	2,459	3,600	17,200	49,284
New Forest	28,108	31,919	12,000	zero	72,027
Guildford and Woking	66,130	zero	11,934	14,164	92,228
Upper M3	162,525	zero	125,514	12,486	300,524
Total Development Potential	750,181	76,830	257,631	53,213	1,137,854

**Table 3.7: Market Area Sites by Market Attractiveness**

<b>Market Areas</b>	<b>1 (Low)</b>	<b>2 (Below Average)</b>	<b>3 (Average)</b>	<b>4 (Above Average)</b>	<b>5 (High)</b>	<b>Total M. Area Site</b>
<i>Basingstoke &amp; Andover</i>	1	2	7	4	11	25
<i>Blackwater Valley</i>	1	2	5	5	9	22
<i>C. Hampshire &amp; New Forest</i>	zero	5	5	5	1	16
<i>C. Hampshire</i>	zero	3	2	2	1	8
<i>New Forest</i>	zero	2	3	3	zero	8
<i>Guildford and Woking</i>	zero	1	7	3	8	19
<i>Upper M3</i>	zero	1	4	5	9	19
<i>Total Market Attractiveness</i>	2	11	28	22	38	101

**Table 3.8: Market Area Sites by Market Availability**

<b>Market Areas</b>	<b>1 (Low)</b>	<b>2 (Below Average)</b>	<b>3 (Average)</b>	<b>4 (Above Average)</b>	<b>5 (High)</b>	<b>Total M. Area Site</b>
<i>Basingstoke &amp; Andover</i>	1	7	7	1	9	25
<i>Blackwater Valley</i>	3	2	zero	5	12	22
<i>C. Hampshire &amp; New Forest</i>	zero	1	6	2	7	16
<i>C. Hampshire</i>	zero	1	3	1	3	8
<i>New Forest</i>	zero	zero	3	1	4	8
<i>Guildford and Woking</i>	1	1	6	zero	11	19
<i>Upper M3</i>	zero	zero	4	zero	15	19
<i>Total Market Attractiveness</i>	5	11	23	8	54	101

**Table 3.9: Market Area Sites by Site Quality**

<b>Market Areas</b>	<b>1 (Low)</b>	<b>2 (Below Average)</b>	<b>3 (Average)</b>	<b>4 (Above Average)</b>	<b>5 (High)</b>	<b>Total M. Area Site</b>
<i>Basingstoke &amp; Andover</i>	1	2	1	11	10	25
<i>Blackwater Valley</i>	zero	2	4	6	10	22
<i>C. Hampshire &amp; New Forest</i>	zero	4	6	5	1	16
<i>C. Hampshire</i>	zero	2	2	3	1	8
<i>New Forest</i>	zero	2	4	2	zero	8
<i>Guildford and Woking</i>	zero	zero	8	3	8	19
<i>Upper M3</i>	zero	2	6	2	9	19
<i>Total Site Quality</i>	1	10	25	27	38	101

#### Appendix 4: Market Ready Sites below 10,000 sqm Threshold

Site Ref	Site Address	Proposed Development	Market Area	Use Class	Floor-space (sqm)	Market Segment	Development Potential
272	110-180 Frimley Business Park, Farnborough	Redevelopment and erection of two 3-storey Office buildings	Blackwater Valley (Frimley Bus. Park)	B1a	3,618	1	A1
222	Unit 100, Frimley Business Park, Farnborough	Redevelopment for replacement Office building		B1a	4,030	1	A1
42	Buckmore Farm A272, Petersfield	Local Plan Allocation for B1a/b	Central Hampshire & New Forest	B1a	8720	1	A1
6(s)	Burymead House, Guildford Plaza, Portsmouth Road, Guildford	Two linked office buildings g	Guildford and Woking	B1a	6,875	1	A1
9(s)	George Stephenson Road, Surrey Research Park Phase 12, Guildford	R&D building	Guildford and Woking (Surrey Research Park cluster)	B1c	2,080	2	A1
10(s)	Building A, Faraday Court, Surrey Research Park Phase 11, Guildford	Office development		B1a/b	2,828	2	A1
11(s)	Building B, Faraday Court, Surrey Research Park Phase 11, Guildford	Remainder of Ph11		B1a/b	1,950	2	A1
12(s)	Building B, George Stephenson Place, Surrey Research Park Phase 12, Guildford	Office/R&D building		B1a/b	1,876	2	A1
65(s)	121 Chertsey Road, Woking	Office redevelopment	Guildford and Woking	B1a	3,493	1	A1
3(s)	Walton Court, Station Avenue, Walton on Thames	3-storey extension to office building	Upper M3	B1a	7,814	4	A1
27(s)	Unit 5, Pine Trees Business Park, Chertsey Lane, Staines	Redevelopment for 4-storey office building (GIFA)	Upper M3	B1a	5,582	1	A1
29(s)	Parklands, Bittams Lane, Chertsey	4-storey office building	Upper M3	B1a	4,832	1	A1
109 (s)	Buildings 3 & 4 Lotus Park, The Causeway, Staines	Office extension	Upper M3	B1a	7,457	1	A1

## Appendix 5: Investment Potential Sites below 10,000 sqm Threshold

Site Ref	Site Address	Proposed Development	Market Area	Use Class	Floor-space (sqm)	Market Segment	Development Potential
137	Unit 72, Hawley Lane, Farnborough	Redevelopment for 30 B1c, B2, B8 Units Blackwater Valley	Blackwater Valley	B1-8	8,732	4	4
87	Queens Gate, Government House Road, Farnborough	Redevelopment for employment uses	Blackwater Valley	B1-8	4,134	4	4
52(s)	Plot 5, Coxbridge Business Park, Endeavour Place	Light industrial unit	Blackwater Valley	B1c	1,394	4	4
34	Plot D6 Ampress Park, Lymington	Ten Industrial units (B1, B2, B8 use)	Central Hampshire & New Forest	B1-8	2,932	4	4
39	Plot J1, J2 Ampress Park, Lymington	Industrial development	Central Hampshire & New Forest	B1-8	2,280	4	4
44	Embankment Way and Pullman Way, Ringwood	Industrial, Office, Warehouse development	Central Hampshire & New Forest	B1-8	3,444	4	4
278	Former AI Centre, Beechen Lane, Lyndhurst	Redevelopment including Offices	Central Hampshire & New Forest	B1	2,831	1	1
67(s)	Land at Dorset Way (adjacent Unit 5) Byfleet	2-storey industrial units	Central Hampshire & New Forest	B1c, B2	1,462	4	4
241	Chilcomb Centre, Chilcomb Lane, Chilcomb	Re-development for Business and Innovation Centre	Central Hampshire & New Forest	B1-8	8,270	4	4
56(s)	Langham Park, Cattershall Lane, Godalming	Mixed development including 5 office buildings & light ind unit	Guildford and Woking	B1a/c	1,675	4	4
63(s)	Woking Gateway/Chertsey Street/Cawsey Way/High Street/Commercial Way, Woking	Mixed use redevelopment inc. offices. Floorspace figure is indicative. Site currently occupied	Guildford and Woking	B1a	9,000	1	1
75(s)	Lyon Road - Hersham Trading Estate & Ember Centre, Hersham	N/A	Upper M3	B1, B2, B8, Sui Generis	1,920	3	3
26(s)	Phase 3, Delta, The Bourne Business Park, Addlestone Road, Addlestone	2 linked office buildings	Upper M3	B1a	9,410	1	1

## Appendix 6: Assessment Criteria

### Employment Land in Hampshire – Site Assessment Study 2010 Update Strategic location and availability criteria

#### Strategic Location

##### Strategic Location

Score	Possible indicators
5 Prime location	M3 corridor
4 Sub-prime location	A3 and similar
3 Median location	Strategic towns commercial core (Basingstoke, Guildford, etc)
2 Sub-median location	Major towns
1 Secondary location	All other sites

*NB: Possible indicators highly provisional*

#### Availability

##### Planning Status

Score	Possible indicators
5 Immediately available	Detailed planning permission
4 Available short term	Outline planning permission
3 Available medium term	Published development brief
2 Available long term	Local Plan allocation
1 Potentially available	Allocation in Approved Draft Local Plan, or reserve site

##### Economic Constraints

Score	Possible indicators
5 Immediately available	No obstacles to development
4 Available short term	Minor obstacles to development; relatively easy, quick and cheap to resolve
3 Available medium term	Minor obstacles to development; more difficult, expensive and time-consuming to resolve
2 Available long term	Major obstacles to development; very difficult, expensive and time-consuming to resolve
1 Potentially available	Major obstacles to development; extremely difficult, expensive and time-consuming to resolve

*NB: Obstacles to development would include access difficulties, infrastructure requirements, contamination remediation costs, etc.*



## Employment Land in Hampshire – Site Assessment Study 2010 Update

### Quality assessment criteria and scoring system

#### Access

##### Weighting = 3

Score	Possible indicators
<b>5</b> High	Adjoining main road or motorway junction; easy site access for all vehicles; access to rail, air and sea networks
<b>4</b> Above average	Close to major road network; easy site access for all vehicles
<b>3</b> Average	Easy site access for all vehicles; indirect or restricted access to major road network
<b>2</b> Below average	Restricted access for HGVs; restricted access to major road network
<b>1</b> Low	Restricted access for all commercial vehicles, severely restricted access to major road network

#### Prominence

##### Weighting = 2

Score	Possible indicators
<b>5</b> High	Gateway site to a prominent estate, visible from major road network
<b>4</b> Above average	Visible site, on a main road or prominent estate
<b>3</b> Average	On a main road or prominent estate, tucked away from view
<b>2</b> Below average	Visible, on a minor road or estate
<b>1</b> Low	On a minor road or estate, tucked away from view

#### Local Amenities

##### Weighting = 1

Score	Possible indicators
<b>5</b> High	Close to a town centre with a wide range of services
<b>4</b> Above average	Close to local centre with a reasonable range of services
<b>3</b> Average	Close to a limited range of basic services
<b>2</b> Below average	Close to one or two services
<b>1</b> Low	No services in close proximity
<i>NB1: Employment related services such as banks, travel agents, shops, leisure/recreation, pubs/restaurants</i>	
<i>NB2: "Close" = within about 10 minutes walk</i>	

## Site Layout

### Weighting = 1

<i>Score</i>	<i>Possible indicators</i>
<b>5</b> High	Clear plot, no obstructions
<b>4</b> Above average	Regular shaped plot, obstructed
<b>3</b> Average	Regular shaped plot, fragmented
<b>2</b> Below average	Irregular shaped plot, obstructed
<b>1</b> Low	Irregular shaped plot, fragmented

## Character of Area

### Weighting = 1

<i>Score</i>	<i>Possible indicators</i>
<b>5</b> High	Well established commercial area
<b>4</b> Above average	Established commercial area, with residential area or rural area nearby
<b>3</b> Average	Mixed commercial and residential area
<b>2</b> Below average	Mainly residential or rural area with few commercial uses
<b>1</b> Low	Mainly residential or rural area with no existing commercial uses

## Appendix 7: Market Area Definitions

**Table \*: Market Area Whole Census Area Statistical Ward (2003) Definition**

<b>Basingstoke &amp; Andover</b>	24UGGC : Fleet West
24UBHP : Basing	24UGGD : Frogmore and Darby Green
24UBHQ : Baughurst	24UGGE : Hartley Wintney
24UBHR : Brighton Hill North	24UGGF : Hook
24UBHS : Brighton Hill South	24UGGG : Long Sutton
24UBHT : Brookvale and Kings Furlong	24UGGH : Odiham
24UBHU : Buckskin	24UGGJ : Yateley East
24UBHW : Burghclere	24UGGK : Yateley North
24UBHX : Calleva	24UGGL : Yateley West
24UBHY : Chineham	43UJFS : Bagshot
24UBHZ : East Woodhay	43UJFT : Bisley
24UBJA : Eastrop	43UJFU : Chobham
24UBJB : Grove	43UJFW : Frimley
24UBJC : Hatch Warren and Beggarwood	43UJFX : Frimley Green
24UBJD : Highclere and Bourne	43UJFY : Heatherside
24UBJE : Kempshott	43UJFZ : Lightwater
24UBJF : Kingsclere	43UJGA : Mytchett and Deepcut
24UBJG : Norden	43UJGB : Old Dean
24UBJH : Oakley and North Waltham	43UJGC : Parkside
24UBJJ : Overton, Laverstoke and Steventon	43UJGD : St Michaels
24UBJK : Pamber	43UJGE : St Pauls
24UBJL : Popley East	43UJGF : Town
24UBJM : Popley West	43UJGG : Watchetts
24UBJN : Rooksdown	43UJGH : West End
24UBJP : Sherborne St John	43UJGJ : Windlesham
24UBJQ : South Ham	24ULFR : Cove and Southwood
24UBJR : Tadley North	24ULFS : Empress
24UBJS : Tadley South	24ULFT : Fernhill
24UBJT : Upton Grey and The Candovers	24ULFU : Grange
24UBJU : Whitchurch	24ULFW : Heron Wood
24UBJW : Winklebury	24ULFX : Knellwood
24UNGB : Alamein	24ULFY : Manor Park
24UNGD : Ampport	24ULFZ : Mayfield
24UNGE : Anna	24ULGA : North Town
24UNGG : Bourne Valley	24ULGB : Rowhill
24UNGJ : Charlton	24ULGC : St. John's
24UNGN : Harewood	24ULGD : St. Mark's
24UNGP : Harroway	24ULGE : Wellington
24UNGR : Millway	24ULGF : Westheath
24UNGT : Over Wallop	43UDFY : Ash South and Tongham
24UNGU : Penton Bellinger	43UDFZ : Ash Vale
24UNGX : St Mary's	43UDGA : Ash Wharf
24UNHA : Winton	43ULGP : Farnham Bourne
<b>Blackwater Valley</b>	43ULGQ : Farnham Castle
24UGFS : Blackwater and Hawley	43ULGR : Farnham Firgrove
24UGFT : Church Crookham East	43ULGS : Farnham Hale and Heath End
24UGFU : Church Crookham West	43ULGT : Farnham Moor Park
24UGFW : Crondall	43ULGU : Farnham Shortheath and Boundstone
24UGFX : Eversley	43ULGW : Farnham Upper Hale
24UGFY : Fleet Central	43ULGX : Farnham Weybourne and Badshot Lea
24UGFZ : Fleet Courtmoor	43ULGY : Farnham Wrecclesham and Rowledge
24UGGA : Fleet North	43ULGZ : Frensham, Dockenfield and Tilford
24UGGB : Fleet Pondtail	

<b>Central Hampshire</b>	<b>New Forest</b>
24UCGJ : Alton Amery	24UJGL: Ashurst, Copythorne South & Netley Marsh
24UCGK : Alton Ashdell	24UJGM : Barton
24UCGL : Alton Eastbrooke	24UJGN : Bashley
24UCGM : Alton Westbrooke	24UJGP : Becton
24UCGN : Alton Whitedown	24UJGQ : Boldre and Sway
24UCGP : Alton Wooteys	24UJGR: Bramshaw, Copythorne North & Minstead
24UCGQ : Binsted and Bentley	24UJGS : Bransgore and Burley
24UCGR : Bramshott and Liphook	24UJGT : Brockenhurst and Forest South East
24UCGS : Clanfield and Finchdean	24UJGU : Buckland
24UCGT : Downland	24UJGY : Downlands and Forest
24UCGU : East Meon	24UJHA : Fernhill
24UCGW : Four Marks and Medstead	24UJHB : Fordingbridge
24UCGX : Froxfield and Steep	24UJHC : Forest North West
24UCGY : Grayshott	24UJHF : Hordle
24UCGZ : Headley	24UJHH : Lymington Town
24UCHA : Holybourne and Froyle	24UJHJ : Lyndhurst
24UCHG : Lindford	24UJHL : Milford
24UCHH : Liss	24UJHM : Milton
24UCHJ : Petersfield Bell Hill	24UJHN : Pennington
24UCHK : Petersfield Causeway	24UJHP : Ringwood East and Sopley
24UCLH : Petersfield Heath	24UJHQ : Ringwood North
24UCHM : Petersfield Rother	24UJHR : Ringwood South
24UCHN : Petersfield St Marys	<b>Guildford and Woking</b>
24UCHP : Petersfield St Peters	43UDGB : Burpham
24UCHQ : Ropley and Tisted	43UDGC : Christchurch
24UCHS : Selborne	43UDGD : Clandon and Horsley
24UCHT : The Hangers and Forest	43UDGE : Effingham
24UCHU : Whitehill Chase	43UDGF : Friary and St Nicolas
24UCHW : Whitehill Deadwater	43UDGG : Holy Trinity
24UCHX : Whitehill Hogmoor	43UDGH : Lovelace
24UCHY : Whitehill Pinewood	43UDGJ : Merrow
24UCHZ : Whitehill Walldown	43UDGK : Normandy
24UNGF : Blackwater	43UDGL : Onslow
24UNGH : Broughton and Stockbridge	43UDGM : Pilgrims
24UNGM : Dun Valley	43UDGN : Pirbright
24UNGQ : Kings Somborne and Michelmersh	43UDGP : Send
24UPGM : Cheriton and Bishops Sutton	43UDGQ : Shalford
24UPGP : Compton and Otterbourne	43UDGR : Stoke
24UPGR : Droxford, Soberton and Hambledon	43UDGS : Stoughton
24UPGS : Itchen Valley	43UDGT : Tillingbourne
24UPGT : Kings Worthy	43UDGU : Westborough
24UPGU : Littleton and Harestock	43UDGW : Worplesdon
24UPGW : Olivers Battery and Badger Farm	43ULGF : Alfold, Cranleigh Rural and Ellens Green
24UPHF : Sparsholt	43ULGG : Blackheath and Womersley
24UPGY : St Barnabas	43ULGH : Bramley, Busbridge and Hascombe
24UPGZ : St Bartholomew	43ULGJ : Chiddingfold and Dunsfold
24UPHA : St John and All Saints	43ULGK : Cranleigh East
24UPHB : St Luke	43ULGL : Cranleigh West
24UPHC : St Michael	43ULGM : Elstead and Thursley
24UPHD : St Paul	43ULGN : Ewhurst
24UPHH : The Alresfords	43ULHA : Godalming Binscombe
24UPHJ : Upper Meon Valley	43ULHB : Godalming Central and Ockford
24UPHM : Wonston and Micheldever	43ULHC : Godalming Charterhouse

<b>Guildford and Woking (continued)</b>	43UBGL : Oatlands Park
43ULHD : Godalming Farncombe and Catteshall	43UBGM : Oxshott and Stoke D'Abernon
43ULHE : Godalming Holloway	43UBGN : St George's Hill
43ULHF : Haslemere Critchmere and Shottermill	43UBGP : Thames Ditton
43ULHG : Haslemere East and Grayswood	43UBGQ : Walton Ambleside
43ULHH : Hindhead	43UBGR : Walton Central
43ULHJ : Milford	43UBGS : Walton North
43ULHK : Shamley Green and Cranleigh North	43UBGT : Walton South
43ULHL : Witley and Hambledon	43UBGU : Weston Green
43UMFS : Brookwood	43UBGW : Weybridge North
43UMFT : Byfleet	43UBGX : Weybridge South
43UMFU : Goldsworth East	43UGFQ : Addlestone Bourneside
43UMFW : Goldsworth West	43UGFR : Addlestone North
43UMFX : Hermitage and Knaphill South	43UGFS : Chertsey Meads
43UMFY : Horsell East and Woodham	43UGFU : Chertsey South and Row Town
43UMFZ : Horsell West	43UGFT : Chertsey St Ann's
43UMGA : Kingfield and Westfield	43UGFW : Egham Hythe
43UMGB : Knaphill	43UGFX : Egham Town
43UMGC : Maybury and Sheerwater	43UGFY : Englefield Green East
43UMGD : Mayford and Sutton Green	43UGFZ : Englefield Green West
43UMGE : Mount Hermon East	43UGGA : Foxhills
43UMGF : Mount Hermon West	43UGGB : New Haw
43UMGG : Old Woking	43UGGC : Thorpe
43UMGH : Pyrford	43UGGD : Virginia Water
43UMGJ : St John's and Hook Heath	43UGGE : Woodham
43UMGK : West Byfleet	43UHFS : Ashford Common
<b>Upper M3</b>	43UHFT : Ashford East
43UBFZ : Claygate	43UHFU : Ashford North and Stanwell South
43UBGB : Cobham Fairmile	43UHFW : Ashford Town
43UBGA : Cobham and Downside	43UHFX : Halliford and Sunbury West
43UBGC : Esher	43UHFY : Laleham and Shepperton Green
43UBGD : Hersham North	43UHFZ : Riverside and Laleham
43UBGE : Hersham South	43UHGA : Shepperton Town
43UBGF : Hinchley Wood	43UHGB : Staines
43UBGG : Long Ditton	43UHGC : Staines South
43UBGH : Molesey East	43UHGD : Stanwell North
43UBGJ : Molesey North	43UHGE : Sunbury Common
43UBGK : Molesey South	43UHGF : Sunbury East

**Table \*: Market Area Whole District Definition**

<b>Basingstoke &amp; Andover</b>	<b>New Forest</b>
Basingstoke & Deane	New Forest
Test Valley*	
<b>Blackwater Valley</b>	<b>Guildford &amp; Woking</b>
Hart	Guildford
Rushmoor	Waverley
Surrey Heath	Woking
<b>Central Hampshire</b>	<b>Upper M3</b>
East Hampshire	Elmbridge
Test Valley*	Runnymede
Winchester	Spelthorne

\*Double counted

# Land & Property Action Group

*“Land and property, together with other aspects of physical infrastructure, represent the raw materials on which economic prosperity can be created. The Land & Property Group's main task is to promote the health and efficient operation of the commercial property sector.”*

## Aims and Objectives

- Adopt and build upon the work of the former Hampshire Economic Partnership, whose Investment, Land and Property Task Group was responsible for a major piece of research in the county.
- Inform Enterprise M3 as a whole about the operation of the commercial property market, including supply, demand and take-up.
- Offer an effective forum for wider discussion on key land and property related issues and how they relate to the delivery of Enterprise M3's strategic plan.
- Identify future market opportunities through the Large Sites Assessment Study that provides a valuable qualitative and quantitative insight into the state of readiness and actual suitability of sites identified by public planning authorities as part of their development land pipeline. Commission a study of Demand and Take Up for commercial premises in its area, which will highlight a short to medium picture of the commercial property market.
- Support inward investment and business growth.

## Areas of Focus

- Market-facing capability via a professional network of “critical friends” who operate at a local level and engage regularly with planning authorities on an informal basis.
- Seek to engage and influence planning and economic policy strands at both the strategic level and through the local delivery process, at a time when the national planning policy is undergoing major change.

## Membership

The Land and Property Action Group aims to provide an inclusive and non-competitive forum for the purposes of carrying out its aims and objectives in support of the efficient working of employment land supply and investment mechanisms.

For further information about the Land & Property Action Group or to get involved please contact Malcolm Young, Chairman & Chief Executive of [The Wilky Group](#)



Driving prosperity in the M3 corridor

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