



Spotlight  
**BEYOND THE ELECTION:  
WHAT NEXT FOR PLANNING?** Spring 2015



# Strategic Land Planning Contacts

National Lead  
Jonathan Steele  
jsteele@savills.com  
023 8071 3949



**Northern England**  
Adam Key  
akey@savills.com  
0113 220 1278

**Midlands**  
Michael Davies  
mpdavies@savills.com  
01216 348 436

**Central**  
Roger Smith  
rasmith@savills.com  
01865 269 057

**South East**  
Chris Rees  
crees@savills.com  
023 8071 3944

**South West**  
Nick Matthews  
nmatthews@savills.com  
01179 100 364

**East**  
Colin Campbell  
ccampbell@savills.com  
01223 347 068

**Wales**  
Tim Gent  
tgent@savills.com  
02920 368 914

**Scotland**  
Simon Herriot  
sherriot@savills.com  
0141 222 4138

**London**  
Jane Barnett  
jabarnett@savills.com  
020 3320 8274



## This publication

This document was published in April 2015. The data used in the charts and tables is the latest available at the time of going to press. Sources are included for all the charts. We have used a standard set of notes and abbreviations throughout the document.

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# PLANNING: REFINE OR REWRITE?

Housing shortfalls are becoming ingrained in the planning system. Action is required

**I**n the raft of pledges that marked the election manifesto launches, detail on planning has been conspicuous by its absence. While housing (and more precisely home ownership) may have featured highly on the election agenda, little has been said about the future of the National Planning Policy Framework (NPPF) by vote-seeking politicians.

So what is likely to happen to planning after polling day? The House of Commons Communities and Local Government Committee report on the operation of the NPPF offers some clues. The number of planning consents for residential development has risen considerably in the three years since the introduction of the NPPF.

Therefore, despite some concerns over weaknesses in the system, the cross-party group concludes that the NPPF needs “adjustment” rather than a “complete overhaul”.

The MPs also state that they want more data. We are happy to oblige.

## Key figures

In this report, we have provided a number of key figures, the most striking of which is that we are heading for a planning shortfall of 180,000 homes over the next parliament if current trends continue.

There are a number of reasons for this weakness.

While the NPPF is intended to be a plan-led system, only 24% of local planning authorities (LPAs) outside

.....  
“25% have neither an adopted plan nor up-to-date SHMA”  
.....

London and National Parks have local plans adopted post NPPF. A greater proportion, 51%, have no adopted plan but are working with recently published strategic housing market assessments (SHMAs). That 25% have neither an adopted plan nor up-to-date SHMAs ought to be cause for alarm.

However, the biggest concern is that housing targets adopted by local planning authorities to date represent only 80% of the level indicated by the appropriate SHMA.

The disparity is even wider where the housing requirement is greatest. The target in the London Plan is 42,000 new homes a year despite a needs assessment of between 49,000 and 62,000.

The allocation of sufficient sites for development also needs addressing even where plans have been adopted. Our research shows that 31% of English local authorities (90 of the 293 excluding London and the National Parks) have acknowledged that they do not have a five year supply of housing land as required by the NPPF.

Furthermore, the lack of definitive methodology for calculating five year land supply, leaves room for interpretation and a lack of certainty as to whether enough land is being allocated to housing. While 175 local authorities state they do have a five year land supply, our own calculations (see p.9) suggest 43% of these do not and 26% are borderline cases.

As a result of these issues, housing shortfalls are at risk of becoming embedded in the planning system, storing up problems for future. ■



**Susan Emmett**  
Research  
+44 (0)20 3107 5460  
semmett@savills.com  
Twitter: @saemmett

## EXECUTIVE SUMMARY



Planning shortfall could grow to 180,000 homes over next five years  
See pages 4/5



76% of local planning authorities outside London and National Parks do not have a post-NPPF plan in place  
See pages 6/7



54% of successful appeals cited a lack of 5 year land supply as a factor. Lack of consistency in calculations is leading to insufficient sites allocated to housing  
See pages 8/9



Pressure points of unmet housing need are emerging in the South East  
See page 10



Savills Manifesto:  
Steps needed to deliver more homes  
See page 11

# Housing need

## PLANNING FOR HOUSING NEED

Planning shortfall could grow to 180,000 over the course of the next parliament unless local authorities work together

**T**he planning system is not delivering housing where need and market demand is greatest. Our analysis shows that the number of homes planned by local authorities in England is likely to result in a shortfall of around 36,000 homes a year, unless local planning authorities take greater account of housing need both within and beyond their boundaries.

Failure to cooperate on housing requirements across local authority boundaries is therefore likely to result in an accumulated planning shortfall

of 180,000 homes over the next five years. This is before we consider what housebuilders and other developers can deliver relative to these targets.

Last year building starts reached 136,000 in England. However, according to analysis undertaken on behalf of the TCPA, we should be building at least 240,000 new homes a year in England to 2031. The greatest requirement is in London and the South East where the property market has been strongest.

However, our analysis shows that these are the areas where the deficiency in the number of homes being planned is likely to be the greatest. Housing targets adopted so far are 80% of the corresponding SHMA figures across the country. A continuation of this trend would result in a shortfall of 26,000 homes a year in the south and east of England, including London. This figure equates to 74% of total housing shortfall for the whole of England.

### London and beyond

Of a total 114 local authorities in the south and east of England, 31 (27%) have neither an adopted local plan nor a recent SHMA published since the NPPF was introduced in 2012.

Yet these local authorities currently accommodate a quarter of all existing households in the region and will face pressure to meet the requirements for housing emerging from London and surrounding local authorities.

The 31 local authorities without post-NPPF local plans include Sevenoaks, Elmbridge and Epping Forest. These are strong housing markets where over 50% of the authority is designated as Green Belt.

Shortfalls are less pronounced in the North, Midlands and west of England. Assuming targets adopted by the local authorities that still lack a post-NPPF plan are 80% of their SHMA, the annual planning shortfall could amount to 7,349 homes in the Midlands and west of England and 2,038 in the North.

Despite the increase in planning permissions towards 200,000 homes per year in England last year, 20,000 were granted through appeal (see p.8). A closer analysis reveals persistent problems in maintaining an adequate supply of land for housing and that this problem is most notable where the level of housing need is greatest. ■

## HOUSEHOLD PROJECTIONS

### Crystal ball or rear-view mirror?

Household projections play an important role in identifying the total amount of new housing supply that should be delivered. They are identified by Planning Practice Guidance as the starting point for objectively assessing housing need at a local level. However, they do not tell the whole story and can be misleading.

For a start, they are projections of recent trends, not forecasts. Hence, since the economic downturn, the forecasts indicate a reduced level of household formation, which is a reflection of affordability pressures restricting access to the housing market and lower levels of housebuilding.

Issues at a national level are magnified at a local level. Households can only form if there is a home for them to move into. If not enough homes are built, the household projection will be correspondingly lower. Forecasts in areas with historically low levels of housebuilding may therefore mask high levels of concealed housing need.

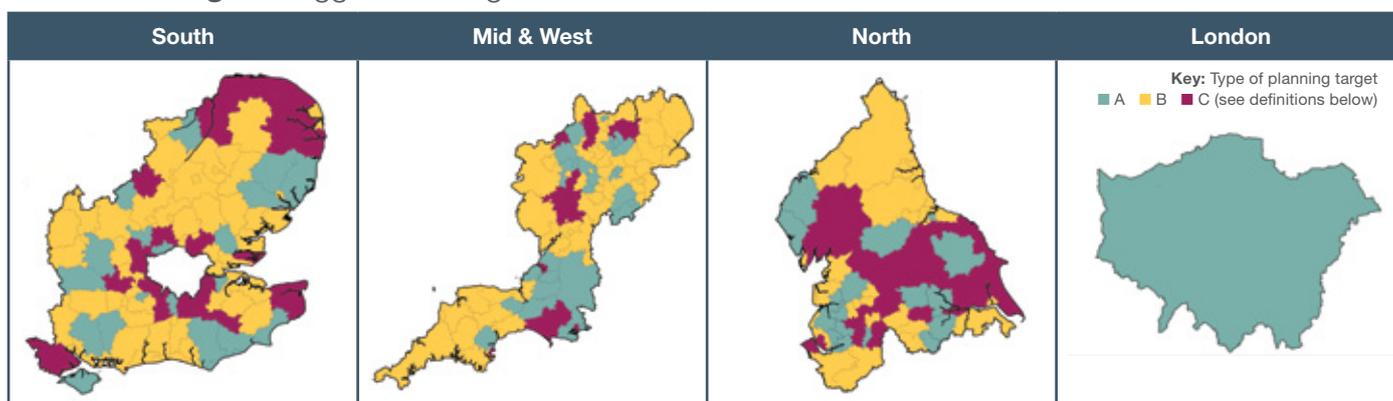
Household projections are heavily based on population projections and as such

are dependent on assumptions of certain unknowns such as future trends in migration. Any change in the attractiveness of an area as a place to live, work or study could have a significant impact on the population projections, which feeds through into the household projections.

Analysis by the Town and Country Planning Association (TCPA) in 2013 (undertaken by the late Alan Holmans) takes into account economic factors such as the 2008/09 downturn and indicates that the true need for housing in England is 240-245,000 homes per year, far in excess of the 210,000 stated in the latest official household projections issued in 2012.

It is therefore essential to investigate the full range of evidence available, including market signals, to understand all the interlocking factors that contribute to our need for housing now and in the future. For the reasons given above we have used Holmans' figures in our analysis opposite, referencing the former government regions that were used in that study.

TABLE 1

**Plans and targets: Biggest housing shortfalls in London and the South**

'Super' region	South	Mid & West	North	London	Totals
Former regions covered	SE, EE	SW, WM, EM	YH, NW, NE	London	All
Total Local Authorities	114	107	72	32 + City of London	326
Housing need (Holmans for TCPA)	<b>72,300</b>	<b>65,500</b>	<b>49,300</b>	<b>56,400</b>	<b>243,500</b>

**A: LOCAL AUTHORITIES WITH POST-NPPF ADOPTED LOCAL PLANS**

Number of Local Authorities	22 (19%)	30 (28%)	19 (26%)	The London Plan has been adopted and sets a combined housing target across all London boroughs of at least 42,000 homes pa.	104 (32%)
% of existing households in the region	19%	29%	24%		35%
Adopted targets as % of housing need in the region	15%	28%	33%		36%

**B: LOCAL AUTHORITIES WITHOUT AN ADOPTED PLAN BUT WITH POST-NPPF SHMA**

Number of Local Authorities	61 (54%)	55 (51%)	32 (44%)	NA	148 (45%)
% of existing households in the region	56%	51%	45%		43%
SHMA targets as % of need	59%	53%	42%		40%

**C: LOCAL AUTHORITIES WITH NEITHER AN ADOPTED PLAN NOR POST-NPPF SHMA**

Number of LAs remaining	31 (27%)	22 (21%)	21 (31%)	A shortfall of 14,400 is planned against Holmans' need figure. The London SHMA acknowledges need as 49-62,000 but that it can't be fully met due to land availability.	74 (23%)
% of regional households remaining	25%	21%	31%		22%
<b>SCENARIO 1: 100% of SHMA objectively assessed need is adopted as local target</b>					
% of regional housing need left unplanned	26%	19%	26%		24%
Shortfall (or surplus)	<b>336</b>	<b>-1,441 (surplus)</b>	<b>-3,913 (surplus)</b>		<b>9,382 inc Lon</b>
<b>SCENARIO 2: 80% of SHMA objectively assessed need is adopted as local target</b>					
% of regional housing need left unplanned	39%	30%	43%		34%
Shortfall	<b>11,775</b>	<b>7,349</b>	<b>2,038</b>		<b>35,562 inc Lon</b>

Source: Savills Research, Town and Country Planning Association

# Planning policy IS THE NPPF WORKING?

76% of authorities do not have a post-NPPF plan in place

**T**he NPPF centres on a plan-led system where local plans represent the starting point for decision-making. In order for the planning system to operate effectively, it requires that all local authorities have adopted a post-NPPF plan (i.e. adopted after March 2012). A post-NPPF plan gives LPAs greater control of planning decisions and also gives communities much more power to determine where development takes place.

Our research has found that, three years after the introduction of the NPPF, the process of adoption of new plans is slow. Of the 293 English LPAs (excluding London and National Parks), 222 (76%) do not have a post-NPPF plan in place. These LPAs are therefore relying on outdated plans and assessments of housing need.

Of additional concern is that among the LPAs without up-to-date plans are major metropolitan areas such as Newcastle, Liverpool, Manchester, Southampton and Portsmouth. In addition, many of the authorities surrounding London are similarly without up-to-date plans. The situation around London is therefore at risk of exacerbating London's shortfall rather than seeking to address it.

Of the 222 LPAs without up-to-date plans, 165 are at various stages of preparing a new plan ranging from initial preparation through to the examination stage. This leaves some 57 LPAs that have not started to prepare a new plan. Even where Local Plans have been adopted subsequent to the NPPF being published, our research found that 58% (41 out of 71) are based on SHMAs that pre-date the NPPF. Such plans are at risk of being formulated on an outdated assessment of housing need.

## Levels of plan adoption

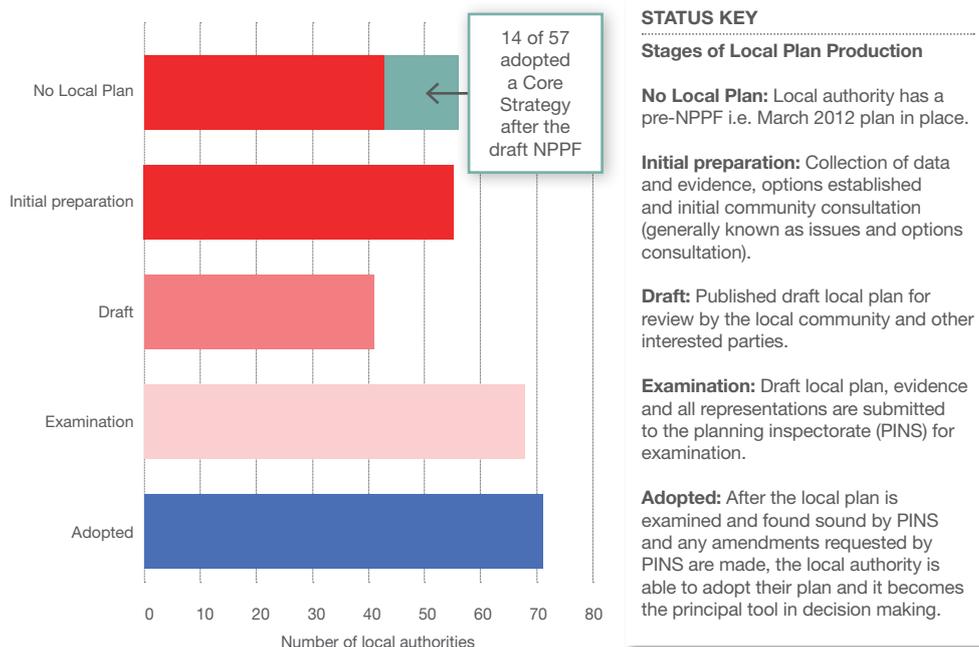
Graph 1 shows that 165 local authorities are effectively 'caught up' in the plan-making system. LPAs have been subject to various policy changes from the Government over the last few years, creating significant uncertainty for LPAs. Furthermore, the onus on LPAs to provide up-to-date housing evidence has meant they must keep pace with changing market and demand conditions.

Resourcing within LPAs is also an issue due to job cuts and the fact that the remaining resources are often re-directed to busy development control teams rather than plan-making. The result is often that smaller policy teams are left to write local plans that must simultaneously balance the needs of community, councillors and developers. The complexity of these related issues means that the length of local plans has also started to increase with some local plans exceeding 300 pages (for example, North Dorset).

## Examination findings

Many plans are getting as far as the examination stage before being found to be 'unsound'. Aylesbury Vale, Mid Sussex and Waverley councils are amongst those who have spent years preparing plans only for them to fail before an inspector. Inspectors have identified numerous reasons for finding plans 'unsound', but the most frequent reasons are planned levels of housing being too low or not being evidence-

GRAPH 1  
Post-NPPF Local Plan status



Source: Savills Research

based and failing to comply with the 'duty to cooperate'.

Falling at the last hurdle often means returning to 'square one' of the plan-making process and therefore delaying adoption of the local plan. Introducing flexibility to the system, for example an earlier 'check' of key strategic sites, could save time and be a potential improvement to the system.

One mechanism of flexibility is the adoption of local plans subject to the need for an 'early review'. This applies to a third of plans which have been adopted post-NPPF. It enables a plan to be adopted despite an element of the evidence base being found unsatisfactory by the inspector, for example inadequate evidence to support the housing target.

The early review procedure often has a set timeframe e.g. for the review to be completed within three years. Given the severity of the housing crisis, it would be preferable to avoid plans failing at a late stage by ensuring that housing numbers are robust at an earlier stage in the original plan-making process.

### Plan-making refinements

While it is possible to identify flaws in the current system, there is a general consensus in the planning and development industry that further time is required to see the full effects of the NPPF play out before any substantial changes are introduced.

There is however a clear need for strategic 'tweaks' to amend acknowledged deficiencies that are already apparent, for example the effectiveness of the duty to cooperate. The present system of requiring local authorities to work together to address strategic issues is not achieving joined-

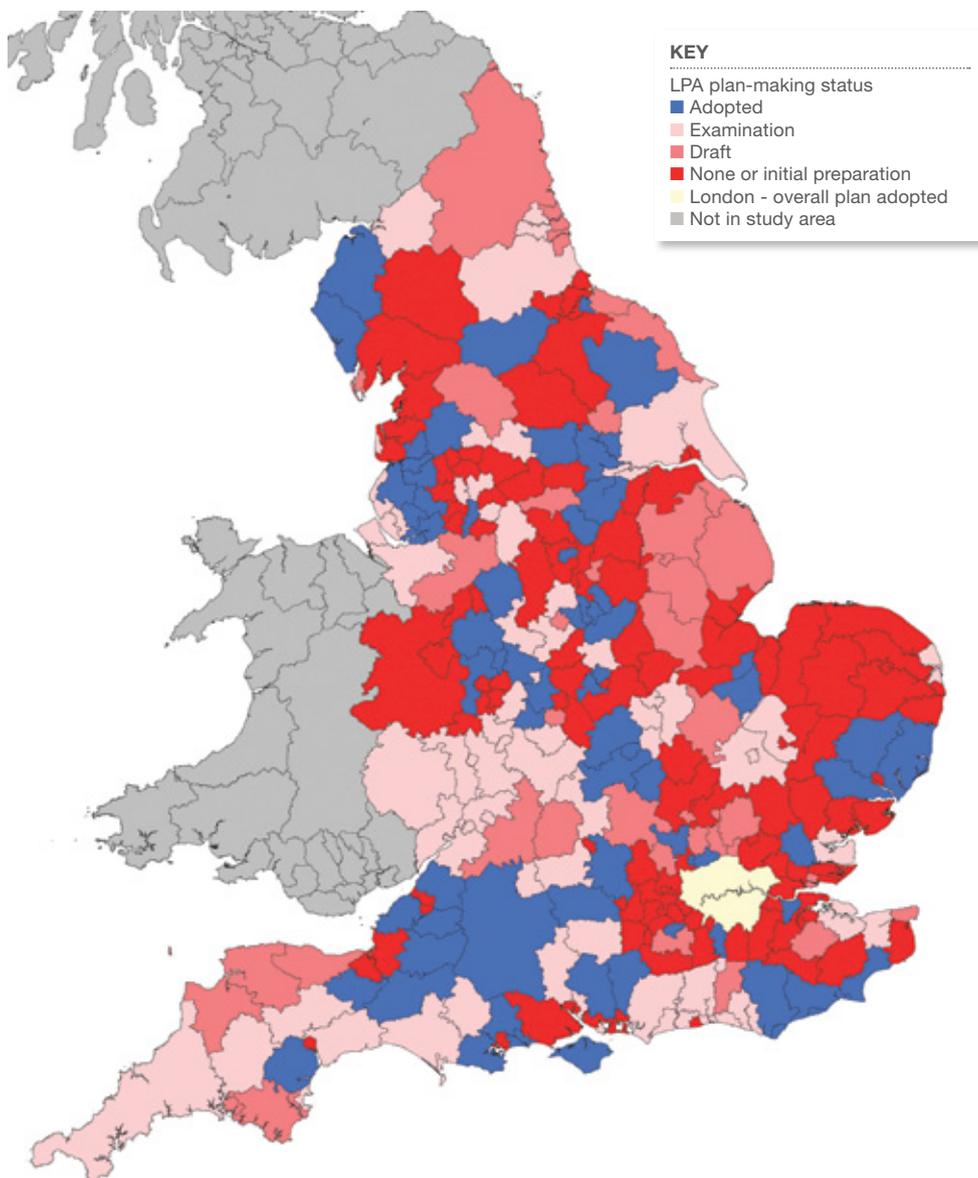
up outcomes and this is therefore an obvious area for reform.

Furthermore, a focus on encouraging local authorities to adopt a plan could be achieved through government intervention such as a statutory requirement on local authorities to adopt within a set timeframe or more gently through carefully selected incentives.

Up-to-date plans will enable LPAs to address in full the demand for new homes. With such strategies in place the LPA can shape its own destiny and robustly defend against development proposals that are not consistent with the spatial strategy of the plan. ■



MAP 1 **Plan-making status by local authority**



**24%**

Less than a quarter of local authorities outside London have post-NPPF plans

**58%**

Over half of post-NPPF plans are based on out-of-date SHMAs

Source: Savills Research

# Land supply

## CALCULATING FIVE YEAR LAND SUPPLY

A lack of consistency is leading to insufficient sites for housing

**T**he allocation of sufficient and appropriate sites for development is a crucial element of the plan-led system. Our research has shown that 31% of English LPAs (90 of the 293 excluding London and National Parks) have acknowledged that they have less than five years of housing land supply. 28 authorities have not published a figure, leaving 175 that claim a five year land supply.

60% of those which accept that they have less than five year land supply, have a post-NPPF plan in place, demonstrating that this does not necessarily lead to sufficient (five years or more) housing supply. Not having an identifiable five year supply of deliverable housing land (with the necessary 5 or 20% buffer) has direct consequences with the council's relevant housing policies being determined as 'out of date'.

To enable a like-for-like comparison of the adequacy of land supply we have adopted a standard method of calculating five year land supply, using data published by the local authorities (see 'Our Calculations'). This method makes no assessment of the deliverability of the identified sites within the LPA's land supply.

Our analysis indicates that 76 authorities out of the 175 (43%) have less than 4.5 years of supply. A further 45 (26%) are classed as borderline,

## FIVE YEAR LAND SUPPLY AND APPEALS

There is increasing confidence in larger projects as NPPF system matures

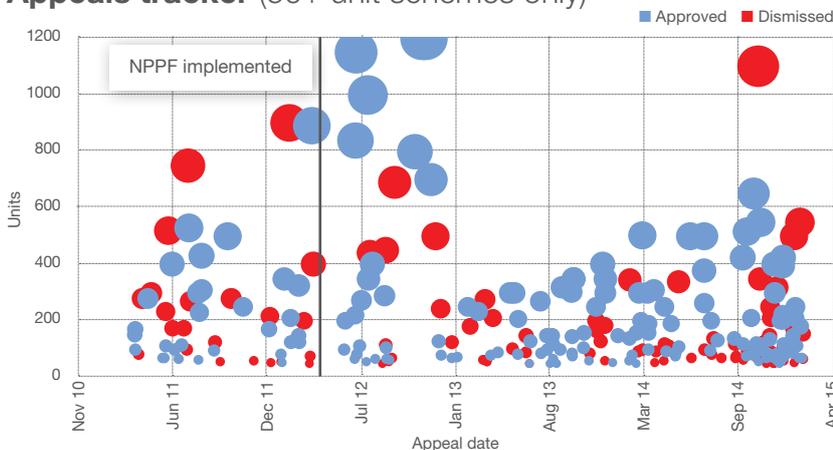
We have undertaken an analysis of 298 appeal decisions granted since January 2014 and comprising 10 residential units or more. The analysis shows an almost 50-50 split between those approved (151) and those dismissed (147). In the 39 appeals where a post-NPPF local plan was in place, the proportion of

appeals that were allowed drops to 38%. Of the 151 appeals that have been granted in total, 54% cited lack of a five year land supply as a material factor leading to the success of the appeal.

Recent appeal decisions also demonstrate that the housing supply

evidence provided by LPAs often does not stand up to scrutiny. For example, authorities have lost appeals where they have sought to bolster the land supply analysis with large sites. In such circumstances, it has been assessed by the Inspector that not all of the new homes on such strategic sites are deliverable within the five year time frame.

GRAPH 2  
Appeals tracker (50+ unit schemes only)



Source: Savills Research

The chart indicates that directly after the introduction of the NPPF some large schemes that were already in the appeal process were approved. After this initial phase, there was a significant reduction in the size of schemes (as measured by the number of dwellings proposed) at appeal.

More recently, there has been a steady and gradual increase, with the maximum scheme size submitted for appeal growing from 275 units in 2013 Q1 to 1100 in Q4 2014. This is perhaps indicative of both a strengthening housing market and also increasing confidence in the chances of success for larger projects at appeal. In total 20,000 units were given approval through the appeal process in 2014.

having 4.5 to 5.5 years of supply. This leaves 54 (31%) that have over 5.5 years of supply on this measure.

In those LPAs that do not have a five year supply of housing land, the NPPF requires that decisions on proposed housing sites be made in accordance with the 'presumption in favour of sustainable development'. This often results in sites being proposed that are outside the LPA's adopted spatial strategy, giving rise to conflict with the expectations of local communities and sites being delivered by the 'planning by appeal' route.

## The Welsh Way

In contrast to the lack of guidance on five year land supply in England, since 2006 the Welsh planning system has ensured that local authorities calculate five year land supply by the same method, leading to far less variation.

More recently in January 2015, the Welsh government produced Technical Advice Note 1 which provides a template for the method of calculation, including stipulating how shortfall must be calculated (spread across all remaining years – Liverpool method). This should lead to robust figures that are comparable across the country.

In an attempt to encourage LPAs to adopt up-to-date plans, the Welsh government has stated that all authorities in Wales without an adopted local plan are automatically presumed to have zero years of land supply. This kind of bold approach in England could provide the incentive needed to ensure plans are prepared and adopted in a timely fashion.

The test of whether or not a LPA has a five year supply of housing land is one of the key tests prescribed in the NPPF and has been a key driver to the increase in planning permissions granted for housing sites, often through the appeal process. Introducing a standard formula with which to calculate the five year land supply position would add clarity and certainty to this key area of national policy and potentially give a further boost to land supply. ■

# 54%

Successful appeals citing lack of five year land supply

## OUR CALCULATIONS

### How to calculate five year land supply

Savills has applied a standard five year land supply calculation to all local authorities in England using the LPA published supply figures and categorised each based on this result (as indicated on the map).

This allows a like-for-like comparison between authorities and echoes the arguments being used in appeals based on five year land supply across the country. Our calculation works as follows:

1. Current five year requirement (taking the first available data source from the following list)
  - a. Post-NPPF local plan target (where Local Plan adopted post March 2012)
  - b. SHMA figure (midpoint if a range) (where published after March 2012)
  - c. Average of 2008/2011/2012 household projections
2. Historic shortfall – target and start point (to match selection above)

- a. Post-NPPF local plan target, from plan start date
- b. Post-March 2012 SHMA figure, from emerging plan start date (if there is one)
- c. Former Regional Spatial Strategy (RSS) target, from RSS start date

3. Historic shortfall – completions from DCLG net additional dwellings data

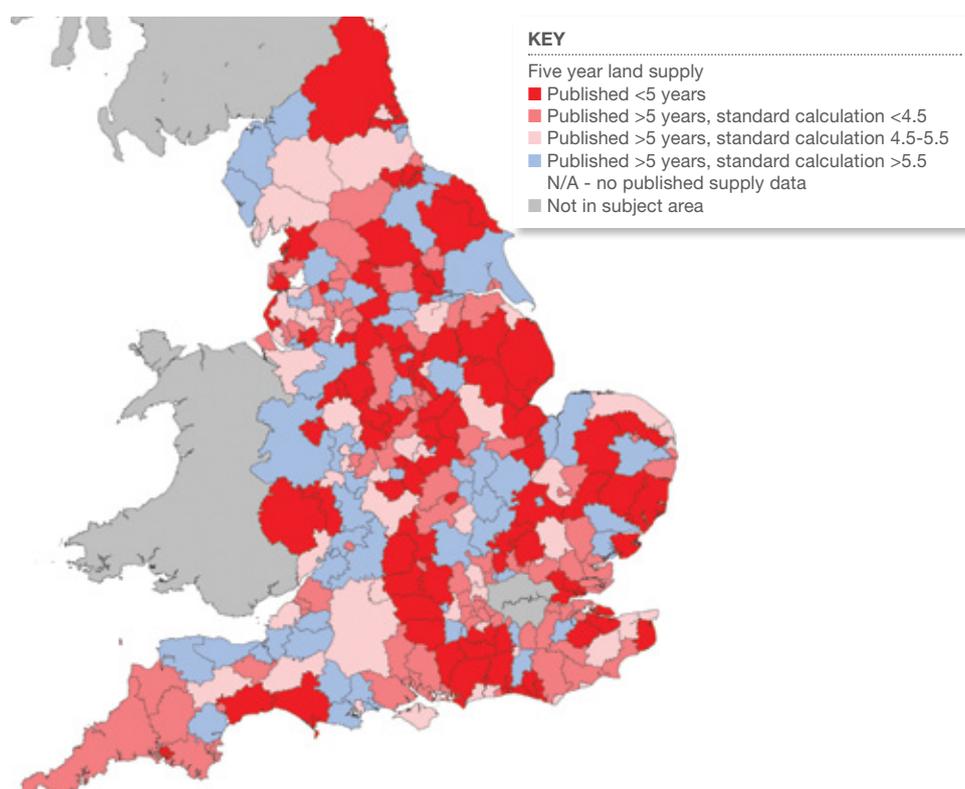
4. Subtract '3' from '2' for shortfall add to five year requirement (known as the Sedgefield method)

5. Apply buffer (5% or 20% depending on authority statement) to requirement AND shortfall

6. Then calculate five year supply based on these figures (based on LPA quoted land availability – from SHLAA and/or AMR) – we are not questioning deliverability of the stated land supply in this exercise.

MAP 2

### Five year land supply, standard calculation categories



Source: Savills Research

# PRESSURE POINTS OF UNMET HOUSING NEED ARE EMERGING IN THE SOUTH EAST

Pockets of unmet housing need are developing in key markets outside of London. A combination of a lack of willingness among local authorities to embrace growth, planning policy constraints and land availability within urban local authorities with tight administrative boundaries, has acted to restrain housebuilding targets below the level of actual need. In such circumstances, housing requirements are likely to spill over council boundaries and thus increase pressure on neighbouring authorities.

This problem of ‘overspill’ growth is unlikely to be effectively addressed unless local authorities engage proactively as required by the ‘duty to cooperate’ established in the Localism Act 2011.

The white patches on the map below (Map 3) show the areas most likely to come under pressure from an overspill of unmet need. These are some of the key pinch points in supply that need to be addressed:

■ Horsham, Mid Sussex and Lewes are likely to see demand for housing arising from Crawley, Reigate and Banstead from the north as well as from a string of coastal towns in the south including Brighton, where growth is constrained by the South Downs National Park.

■ Bracknell Forest, Wokingham and Basingstoke and Deane may increasingly face pressure of housing need arising from Reading, as well as West Berkshire and East Hampshire, where adopted plans do not meet housing need.

■ Development constraints in Oxford means that the city’s growing housing requirements will need to be met in the adjoining authorities of Vale of White Horse, Cherwell, West and South Oxfordshire.

■ Milton Keynes has an adopted plan but the targets are to be reviewed with preparation of a new SHMA. The effect of this is likely to be an increase in pressure

in the adjoining authorities of Aylesbury Vale and Central Bedfordshire.

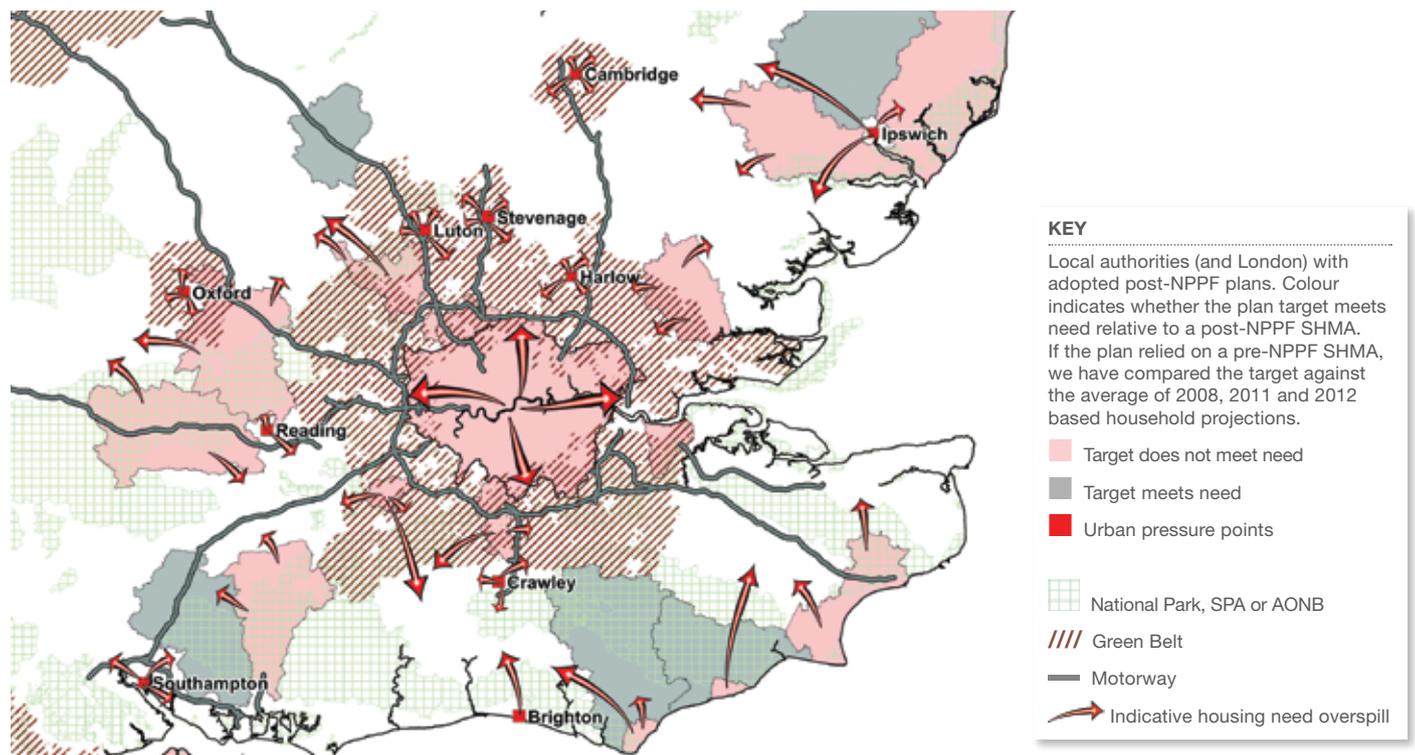
■ Unmet need in Luton and Stevenage will put pressure on Bedfordshire and Hertfordshire.

■ The greatest unmet need will arise out of London which has a land constrained housing target of 42,000 relative to need of between 49,000 and 62,000 according to the SHMA. This will put pressure on markets throughout the Home Counties.

Housing need does not respect local authority boundaries. As it stands, the ‘duty to cooperate’, has not been enough to encourage councils to look beyond their own needs and work together. This aspect of the planning system needs strengthening.

See Savills Manifesto (p.11). ■

MAP 3 **Duty to cooperate ‘pressure points’**



Source: Savills Research

# SAVILLS MANIFESTO STEPS NEEDED TO DELIVER MORE HOMES

■ Retain the NPPF and avoid a further radical overhaul of the planning system.

■ More coordination on strategic issues either by strengthening the duty to cooperate or by providing a “larger than local” tier of planning. The role may be filled by stronger and better-funded Local Enterprise Partnerships, County Councils or “city region” planning boards.

■ To address London’s unmet housing needs, more formal structures of cooperation with neighbouring authorities are required. Garden Cities are also potentially part of the solution but an identifiable process is needed to bring forward land for these new settlements.

■ Stronger measures to encourage the adoption of up-to-date plans. These might include: a statutory requirement to produce an up-to-date plan within a given timeframe; an enhanced new homes bonus where homes are delivered based on an up-to-date plan; and where there is no up-to-date plan, an assumption that there is no five year land supply (the Welsh system).

■ Clear requirement for a local plan to be adopted prior to any neighbourhood plan to ensure a proper chain of conformity.

■ Single approach to the calculation of five year housing land supply to provide greater clarity and to help ensure sufficient sites are allocated for residential development.

## Savills Development and Planning

Please contact us for further information



**Richard Rees**  
Head of Development  
Services  
020 7016 3726  
rrees@savills.com



**Mike Shaw**  
Head of National  
Strategic Development  
07967 555 456  
mshaw@savills.com



**David Jackson**  
Head of Planning  
011 8952 0521  
djackson@savills.com



**Jonathan Steele**  
Head of Housing  
Planning  
023 8071 3949  
jsteele@savills.com



**Chris Rees**  
Planning  
023 8071 3944  
crees@savills.com



**Colin Campbell**  
Planning  
01223 347 068  
ccampbell@savills.com



**Charles Collins**  
Planning  
023 8071 3924  
ccollins@savills.com



**Micaela Benson**  
Planning Research  
020 7299 3018  
mbenson@savills.com

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## Savills Research



**Jim Ward**  
Residential Research  
020 7409 8841  
jward@savills.com



**Susan Emmett**  
Residential Research  
020 3107 5460  
semmett@savills.com  
Twitter: @saemmett



**Chris Buckle**  
Residential Research  
020 7016 3881  
cbuckle@savills.com



**Nick Gregori**  
Residential Research  
020 7409 5907  
ngregori@savills.com



**Neal Hudson**  
UK Residential  
020 7409 8865  
nhudson@savills.com  
Twitter: @resi\_analyst

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