
Constraints Pack — Summary & Next Steps

Tier 1 — Desktop intelligence

Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG — Pack Cover Summary, Not a Planning Statement

Client: **Sample Client**
Reference: 999-DEMO-2026 -PFCO-REP-PackSummary-R01
Date: 10 May 2026
Revision: R01

1 Executive Summary

VERDICT

Constraint-pack overview indicating overall delivery confidence + residual unknowns.

| | |
|------------|--|
| Report | Constraints Pack Summary |
| Site | Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG |
| Client | Sample Client |
| Issue date | 10 May 2026 |

Detail follows in this report. Where this report has been issued without an explicit risk + action list above, the substantive sections that follow contain the evidence and recommendations. For a one-page strategic summary, refer to the Client Decision Pack.

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2 How to Read This Report

This section explains how the report is structured, how risk ratings are presented, and what action you should take based on the findings.

2.1 Reading Order

We recommend the following reading order:

1. **Executive Summary.** A one-page overview of the key findings and overall risk rating. Start here if you are short on time.
2. **Main body sections.** Detailed analysis of each topic area, presented in a logical sequence from site context through to recommendations.
3. **Recommendations.** Specific actions required before, during, or after the planning process.
4. **Limitations and Disclaimers.** Important caveats on the scope of the assessment and the conditions under which the findings are valid.

2.2 Report Structure

Every technical section of this report follows a consistent structure:

- **Context.** What the section covers and why it matters to the development proposal.
- **Data and Evidence.** The factual information drawn from public datasets, authoritative public data sources, and client-supplied information.
- **Analysis.** Our professional assessment of what the data means for the site.
- **Risk Rating.** A traffic-light classification (where applicable) summarising the level of concern.
- **Recommendation.** What action, if any, is required.

2.3 Traffic-Light Key

Risk ratings throughout this report use a three-colour system:

| | |
|---------------|--|
| LOW | Low risk. No significant constraint identified. Standard design measures are sufficient. No specialist investigation is likely to be required. |
| MEDIUM | Moderate risk. A constraint or data gap has been identified that requires attention. Further investigation, a design response, or a planning condition may be needed. |
| HIGH | High risk. A significant constraint or issue has been identified. Specialist investigation, a specific design solution, or early engagement with the relevant statutory body is strongly recommended before submission. |

2.4 What to Do Next

1. Review the Executive Summary for an overview of all findings.
2. Focus on any items rated **MEDIUM** or **HIGH**; these require action before or during the planning process.
3. Check the **Recommendations** section for a prioritised list of next steps.
4. Review the **Update Triggers** section to understand when this report should be refreshed.
5. Contact Site Intelligence if you have questions about any finding or wish to commission follow-up specialist work.

Planning Submission Status — Constraints Pack

This is a one-page-style cover summary for the six desktop constraint reports issued for this site. It provides an overall planning-risk verdict (rule-derived from the individual reports), a likely-validation-items table, a seasonal-survey-risk matrix, and a deduplicated next-stage consultant action list. It is not a Planning Statement, a Design and Access Statement, a Heritage Statement, a Flood Risk Assessment, a Habitats Regulations Assessment, or any other formal specialist deliverable.

3 Pack Contents and Reading Order

This desktop constraints pack contains six discipline-specific reports plus this cover summary. We recommend reading this summary first, then the individual reports in the order shown.

| Ref | Report | Rating |
|-----|---|--------|
| | Ecological Desktop Constraints Appraisal | MEDIUM |
| | HRA & Nutrient Neutrality Desktop Screening Note | MEDIUM |
| | Arboricultural Desktop Constraints Appraisal | LOW |
| | Archaeological & Heritage Desktop Screening Appraisal | HIGH |
| | Phase 1 Contaminated Land Desk Study | LOW |
| | Retail Sequential Test Requirements Note | LOW |

What this cover summary is NOT

This is a desktop pack cover summary. It is not a Planning Statement, not a Design and Access Statement, not a Heritage Statement, not a Flood Risk Assessment, not a Habitats Regulations Assessment, and not any other formal specialist deliverable. The overall planning-risk verdict shown overleaf is rule-derived from the six individual report ratings; it is not a planning-balance opinion and does not displace the LPA's case-officer determination.

4 Overall Planning Risk

Overall Tier-1 Planning Risk: HIGH

Driver(s): Archaeological & Heritage Desktop Screening Appraisal HIGH .

This rule-derived verdict aggregates the per-report headline ratings produced by the six Tier-1 desktop constraints reports. It is not a planning-balance opinion and does not displace the LPA's case-officer determination.

| | |
|------------------------------|----------------|
| Green Belt | Not engaged |
| AONB / National Landscape | Engaged |
| Conservation Area | Not engaged |
| Nutrient catchment | Not engaged |
| Flood Zone 2 or 3 | Not engaged |
| Ancient woodland in vicinity | Not identified |

5 Likely Validation Items

At validation, the LPA will check the application against its published validation list. This table lists the items most likely to be required for a residential scheme on a site of this scale, with the policy or regulatory anchor for each.

| Item | Anchor | Required? |
|--|---|---|
| Application form (PA1 — full / PA2 — outline) | DMPO 2015 Art. 7 | Yes |
| Correct fee | T&CP (Fees) Regulations 2012 (as amended) | Yes |
| Site location plan (1:1250 or 1:2500, OS-based, red line) | DMPO 2015 Art. 7(1)(c)(i) | Yes |
| Block / proposed site plan (1:200 or 1:500) | DMPO 2015 Art. 7(1)(c)(ii) | Yes (for full applications) |
| Existing and proposed elevations / floor plans | DMPO 2015 Art. 7(1)(c)(ii) | Yes (for full applications) |
| Ownership certificate (A / B / C / D) and Article 14 notices | DMPO 2015 Arts. 13–14 | Yes — Cert B if any third-party land |
| Agricultural holdings certificate | DMPO 2015 Art. 13 | Yes (negative declaration if none) |
| Design and Access Statement | DMPO 2015 Art. 9; NPPF Dec 2024 paras 135–139 | Yes for major / Listed-Building / Conservation-Area sensitive |
| BNG statement / metric / Biodiversity Gain Plan | Schedule 7A T&CP Act 1990; NPPF Dec 2024 para 186 | Yes (10% mandatory unless de minimis exempt) |
| Heritage Statement | NPPF Dec 2024 paras 200–214 | Yes — designated assets within 1 km |
| Preliminary Ecological Appraisal / further species surveys | NPPF Dec 2024 para 186; CIEEM 2017 PEA Guidelines | Trigger-based — confirm via REP-11 |
| Phase 1 / Phase 2 contaminated-land assessment | NPPF Dec 2024 paras 196–198 | Trigger-based — confirm via REP-06 |
| Transport Statement / Travel Plan | NPPF Dec 2024 paras 116–117 | Threshold-driven by trip generation |

6 Seasonal Survey Risks

Seasonal Survey Risks

Many ecological surveys can only be undertaken in narrow seasonal windows. Missing a window typically delays a planning submission by six to twelve months. The table below is the standard reference set; only the surveys flagged in the Ecological Desktop Constraints Appraisal will need to be commissioned for this site.

| Survey | Window | Notes |
|---------------------------------------|---|---|
| Bat activity transects | May–Sep (≥3 visits, May+Aug+Sep typical) | BCT 2023 Good Practice Guidelines |
| Bat tree-roost climbing inspection | Apr–Oct | Outside hibernation; PRF inspection may need follow-up emergence survey |
| Bat hibernation roost check | Dec–Feb | Only if Tier-1 flags potential hibernacula |
| Great crested newt — eDNA | 15 Apr – 30 Jun | Single visit; statutory window |
| Great crested newt — presence/absence | Mid-Mar – Jun (≥4 visits, ≥2 mid-Apr–mid-May) | Survey effort scales with HSI |
| Reptile presence/absence | Apr–Jun and Sep (≥7 visits) | Avoid Jul–Aug heat |
| Breeding bird survey | Mar–Aug, core Apr–Jun (≥3 visits) | BTO Common Birds Census methodology |
| Wintering bird survey | Oct–Mar | Only if SPA functionally-linked land suspected |
| Hazel dormouse | Apr–Nov (peak Sep–Oct) | Nest tubes, ≥20 index points |
| Badger sett survey | Year-round (confirm activity Mar–May) | Sett mapping + activity classification |
| Otter / water vole | Apr–Sep | Bankside walkover; only if watercourse / pond network present |
| Hedgerow regulations survey | Apr–Aug (when in leaf) | Important Hedgerows test under Hedgerow Regulations 1997 |

Survey windows per BCT (Bat Conservation Trust) 2023 Good Practice Guidelines, Natural England standing advice, CIEEM 2017, and BTO breeding-bird methodology. Confirm the optimal window with the appointed ecologist before mobilising.

7 Next-Stage Consultant Actions

The following actions are the deduplicated next-stage steps drawn from the six desktop reports. They are grouped by discipline and prioritised against the rule-derived ratings.

| Discipline | Action | Trigger | When |
|-------------------------------|---|---|--|
| Ecology | Commission CIEEM-compliant Phase 1 / UKHab survey + protected species trigger surveys | Tier-1 Ecology rating MEDIUM | Before pre-application meeting / before validation |
| Ecology — BNG | Run statutory biodiversity metric (DEFRA v4.0) | BNG mandatory under Schedule 7A T&CP Act 1990 | Pre-determination |
| HRA | Confirm catchment status with LPA in writing; commission NE nutrient calculator if required | Tier-1 HRA rating MEDIUM | Pre-application |
| Heritage / Archaeology | Commission ClfA-compliant DBA + Heritage Statement; consult LPA archaeological advisor | Tier-1 Heritage rating HIGH | Pre-application |
| Pre-app | Submit pre-application enquiry to LPA with this Tier-1 pack | Standard for any new residential proposal | Before formal validation |

8 General Desktop Limitations

8.1 What This Report Does NOT Assess

This is a desktop intelligence report forming part of the Site Intelligence advisory pack. It does not include intrusive investigation, measured survey, statutory consultation, or formal consultant sign-off unless expressly commissioned. The following are outside the scope of this assessment:

- Intrusive site investigation (boreholes, trial pits, soil sampling)
- Topographic or measured building survey
- Structural assessment of existing buildings or retaining structures
- Detailed ecological survey (Phase 2 habitat surveys, protected species surveys)
- Detailed arboricultural survey to BS 5837
- Archaeological field evaluation (geophysical survey, trial trenching)
- Noise, vibration, or air quality monitoring
- Detailed drainage design or hydraulic modelling
- Legal title review or boundary verification

8.2 Data Gaps

The following data was not available at the time of this assessment:

- Site-specific infiltration test results (BRE Digest 365)
- As-built drainage records for existing development
- Ground investigation data (if no published BGS borehole logs are available for the site)
- Detailed topographic survey data (EA LIDAR used where available)
- Historic land use records prior to available OS mapping epochs

8.3 Key Assumptions

This report has been prepared on the basis of the following assumptions:

- Information provided by the client is accurate and complete

- Public dataset boundaries (flood zones, conservation areas, etc.) are current at the date of this report
- The proposed development is as described in the project brief and does not materially change in scale, layout, or use class
- No contamination, ground instability, or other hazard exists beyond that identified in publicly available records
- Planning policy documents referenced are current at the date of this report

8.4 Specialist Investigation Required

The following specialist investigations may be required depending on the constraints identified in this report:

- Site-specific ground investigation (where contamination or geotechnical risk is identified)
- Phase 2 ecological surveys (where Phase 1 identifies potential for protected species)
- Detailed arboricultural impact assessment (where TPO trees or significant vegetation is present)
- Detailed noise impact assessment (where the site is adjacent to significant noise sources)
- Heritage impact assessment by a conservation-accredited professional (where designated heritage assets are affected)

8.5 Changes That Would Require Update

This report should be reviewed and updated if any of the following occur:

- Material change to the proposed development (scale, layout, use class, or density)
- New or amended planning policy (local plan adoption, NPPF revision)
- Change in housing land supply position
- New environmental data (updated flood maps, newly designated heritage assets or ecological sites)
- More than 12 months elapsed since the date of this report

9 Data Assurance Summary

Site Intelligence applies a rigorous data assurance process to every report. This section documents the breadth of data coverage, confidence levels, and quality assurance stages applied.

9.1 Internal Data Coverage Summary

| Metric | This Report | Typical Stage 1 Desktop Scope |
|-------------------------------|-------------|-------------------------------|
| Data sources consulted | 15 | 3 – 8 |
| Constraint categories checked | 38 | 5 – 10 |
| Data sources queried | 15 | 0 – 2 |
| Provenance entries recorded | 15 | 0 |

Indicative comparison only. Reflects typical early-stage desktop scope rather than a formal industry benchmark; a wider technical due diligence instruction may consult more datasets at any tier.

9.2 Quality Assurance Checklist

- Automated constraint detection (38-flag desktop constraint analysis, deduped to 36 + Flood Zone)
- Source provenance recording (every data point traced to origin)
- Cross-report consistency check (automated financial figure stamping and constraint reconciliation)
- Domain cross-check against the relevant chapter of the National Planning Policy Framework, planning-practice guidance and the chartered-practitioner methodology applicable to this technical area; map review performed against the OS basemap
- Chartered-practitioner sign-off (RICS, RTPI, IHBC, CIWEM, CIEEM, ICE or other chartered specialist as applicable); Tier 2 add-on, not undertaken for this desktop product

10 Anticipated Consultee Queries

Standard statutory consultees will be notified in accordance with the Development Management Procedure Order. Site-specific consultee requirements are identified in the relevant technical reports.

11 Update Triggers

Validity Period: 12 months.

Constraints Pack — Summary & Next Steps is valid for 12 months. After this period, or if any of the following trigger conditions occur, the report should be reviewed and updated before reliance is placed upon its findings.

- Material change to the proposed development (scale, layout, use class, number of dwellings, or site area)

- Adoption of a new or revised Local Plan or Neighbourhood Plan
- Revision of the National Planning Policy Framework (NPPF)
- Change in the Local Planning Authority's published housing land supply position
- Update to Environment Agency flood zone mapping affecting the site
- New or amended designation (conservation area, listed building, SSSI, SAC, SPA, Ramsar, AONB/National Landscape, AQMA, TPO)
- Pre-application advice received from the LPA or any statutory consultee
- Change in site ownership, applicant, or client
- Passage of more than 12 months since the date of issue

To request an update, contact Site Intelligence quoting the document reference shown on the cover page. Updates are provided at a reduced fee where the original data remains substantially current.

12 Important: Limitations, Disclaimers and Conditions of Use

1. Named Client and Reliance Restriction

This report has been prepared by Site Intelligence™ (a service of PF & Co Holdings Ltd) for the sole and exclusive use of ~~Sample Client~~ ('the Client') in connection with the proposed development at Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG. No other party may rely upon, reproduce, or distribute this report or its findings without the prior written consent of Site Intelligence. Any unauthorised use or reliance by third parties is entirely at their own risk, and Site Intelligence accepts no responsibility or liability in such circumstances.

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4. Information Reliance

The findings in this report are based on information provided by the Client, publicly available data sources, and desktop research. Site Intelligence has not independently verified the accuracy or completeness of information provided by the Client or third parties.

5. Limitations of Investigation

The scope of this report is limited to a Stage 1 desktop tier1-pack-summary undertaken on the date of this report. The findings reflect conditions and information available at the date of investigation. Conditions may change over time, and the report should not be relied upon beyond the validity period stated.

6. Professional Advice Caveat

This report provides professional opinion based on the information available at the time of preparation. It does not constitute legal advice, and specialist professional advice should be sought for specific matters including but not limited to structural engineering, surveying, ecology, archaeology, and contaminated land investigation.

7. No Guarantee of Outcome

Site Intelligence provides no guarantee as to the outcome of any planning application, building control submission, or statutory process. Planning and regulatory decisions are made by the relevant authorities at their sole discretion.

8. Data Completeness Caveat

While every effort has been made to identify relevant constraints and information, the absence of a recorded constraint does not guarantee that no constraint exists. Public data sources may contain gaps, errors, or omissions. The absence of a record does not guarantee the absence of a constraint.

9. Limitation of Liability

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11. Statutory Authority Submission Note

Where this report is submitted to a statutory authority (planning authority, building control, Environment Agency, etc.), the authority will exercise its own professional judgement in assessing the application. Submission of this report does not confer any right of reliance upon the authority, and Site Intelligence accepts no liability for decisions made by statutory authorities.

12. Mortgage / Valuation / Purchaser Exclusion

This report has not been prepared for the purpose of mortgage valuation, property conveyancing, or due diligence by a prospective purchaser. Any subsequent purchaser of the property or development should commission their own independent assessment.

13. Report Validity Period

This report is valid for a period of 12 months from the date of issue. After this period, the report should be reviewed and updated to reflect any changes in site conditions, planning policy, or available data. Update triggers are documented in the preceding section.

14. Governing Law and Jurisdiction

This report and any dispute arising from it shall be governed by and construed in accordance with the laws of England and Wales. The courts of England and Wales shall have exclusive jurisdiction.

15. Not Financial / QS / Valuation Advice

Any cost estimates, development appraisals, or financial information contained in this report are preliminary and indicative only. They do not constitute quantity surveying advice, professional valuation, or financial advice. All cost estimates should be verified by a qualified quantity surveyor or cost consultant before being relied upon for investment or procurement decisions.

16. Terms of Engagement

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Product-Specific Note

This Constraints Pack — Summary & Next Steps is a desktop assessment. It does not include site-specific survey, intrusive investigation, or specialist field work. The findings are based on publicly available data and should be read in conjunction with the Known Limitations section of this report.

Data Sources & Verification

The table below identifies the principal datasets used or flagged for verification. Where a source carries a verification URL it can be checked independently; where a source is marked “contact provider for verification” or “awaiting retrieval”, reliance should not be placed on that item until its status is updated to retrieved/verified. Data retrieval dates are recorded for audit purposes.

Wider platform datasets queried (audit log)

The table below lists every enrichment dataset queried by Site Intelligence’s platform during the production of this client pack. Not every dataset is materially relied upon by this specific report — see the Data Source Relevance section above for the flood-specific split. The full audit log is kept for completeness and source-provenance traceability.

| Source / verification URL | Authority | Scope | Vintage / refresh | Retrieved |
|---|---|---|---|------------|
| EA Flood Map for Planning https://flood-map-for-planning.service.gov.uk | Environment Agency | Flood zones, surface water risk, historic floods | 2024 Q4 / Quarterly | 2026-04-11 |
| National Heritage List for England https://historicengland.org.uk/listing/the-list | Historic England | Listed buildings, scheduled monuments, registered parks | Continuously updated / Continuous | 2026-04-11 |
| MAGIC Interactive Map https://magic.defra.gov.uk | Natural England / DEFRA | SSSIs, SACs, SPAs, Ramsar sites, NNRS | Continuously updated / Continuous | 2026-04-11 |
| Multi-source constraint detection https://magic.defra.gov.uk | Various (38 datasets, deduped to 36 + Flood Zone) | Green Belt, AONB, conservation areas, TPOs, flood zones | Mixed (see per-dataset) / Mixed | — |
| Census 2021 https://www.ons.gov.uk/census | Office for National Statistics | Population, demographics, housing tenure, travel patterns | 2021 / Every 10 years | 2026-04-11 |
| PTAL Calculation (TfL TN14) https://data.london.gov.uk/dataset/public-transport-accessibility-levels | Site Intelligence™ (TfL methodology) | Public transport accessibility index and grade | TN14 methodology (2015+) / Per retrieval (timetable-live) | 2026-04-11 |
| OpenStreetMap / Overpass https://www.openstreetmap.org | OpenStreetMap Contributors | Amenity proximity: schools, GPs, shops, transport stops | Continuously updated / Continuous | 2026-04-11 |
| BGS Geology of Britain https://mapapps.bgs.ac.uk/geologyofbritain/home.html | British Geological Survey | Bedrock, superficial deposits, made ground | Periodically updated / Annual+ | 2026-04-11 |
| HM Land Registry Price Paid Data | HM Land Registry | Comparable property sale prices and transactions | Continuously updated / Monthly | 2026-04-11 |

| Source / verification URL | Authority | Scope | Vintage / refresh | Retrieved |
|--|--------------------------------|--|---|------------|
| https://www.gov.uk/government/statistical-data-sets/price-paid-data-downloads | | | | |
| ONS Housing Affordability https://www.ons.gov.uk/peoplepopulationandcommunity/housing | Office for National Statistics | Affordability ratios, private rents, house prices | Latest annual release / Annual | 2026-04-11 |
| Agricultural Land Classification https://magic.defra.gov.uk | Natural England | Provisional ALC grade, best & most versatile status | Provisional (1960s-80s baseline) / Very infrequent | 2026-04-11 |
| National Character Area Profiles https://www.gov.uk/government/publications/national-character-area-profiles-data-for-local-decision-making | Natural England | Landscape character assessment and key characteristics | 2013 (NCA profile set) / Very infrequent | 2026-04-11 |
| DfT Road Traffic Statistics https://roadtraffic.dft.gov.uk | Department for Transport | Annual average daily traffic counts | Annual (latest available) / Annual | 2026-04-11 |
| STATS19 Road Accident Data https://www.data.gov.uk/dataset/cb7ae6f0-4be6-4935-9277-47e5ce24a11f/road-safety-data | Department for Transport | Road traffic collisions and casualties | Annual (latest available) / Annual | 2026-04-11 |
| DEFRA Background Air Quality https://uk-air.defra.gov.uk/data/laqm-background-maps | DEFRA | Background NO2, PM10, PM2.5 concentrations | Annual map set (latest modelled year) / Annual | 2026-04-11 |
| DEFRA AQMA Boundaries https://uk-air.defra.gov.uk/aqma/maps | DEFRA | Air Quality Management Area designations | Continuously updated / Continuous | 2026-04-11 |
| EA LIDAR Data https://environment.data.gov.uk/DefraDataDownload/?Mode=survey | Environment Agency | Terrain elevation, DSM/DTM coverage | LIDAR Composite (latest available tile) / Per acquisition programme | 2026-04-11 |
| DNO Long Term Development Statement Contact provider for verification | Distribution Network Operator | Electrical grid capacity and connection assessment | Latest LTDS (per DNO) / Annual | 2026-04-11 |
| LPA Planning Portal Contact provider for verification | Local Planning Authority | Nearby planning application history and decisions | Continuously updated / Continuous | 2026-04-11 |

Vintage = publication date of the underlying dataset. Refresh = upstream update cadence. Retrieved = when Site Intelligence fetched the record used in this report.

Policy & Legislative Sources

| Document | Published By | Edition | URL |
|---|---------------|-------------------------------|---|
| National Planning Policy Framework | DLUHC | December 2024 | https://www.gov.uk/government/publications/national-planning-policy-framework--2 |
| Planning Practice Guidance | DLUHC | Online (continuously updated) | https://www.gov.uk/government/collections/planning-practice-guidance |
| Planning (Listed Buildings and Conservation Areas) Act 1990 | UK Parliament | As amended | https://www.legislation.gov.uk/ukpga/1990/9/contents |

Local Plan: **East Devon Local Plan 2013-2031 (Adopted)** (East Devon District Council). Neighbourhood Plan: Sid Valley Neighbourhood Plan (Made November 2019).

AI-Assisted Analysis — Reference Statement

This report was prepared using AI-assisted data collation and analysis under internal quality-control procedures, in line with emerging professional-body guidance on the responsible use of AI in surveying and planning practice. All data sources are listed above with retrieval dates and verification URLs. A named professional remains responsible for reviewing and approving the contents of this report before issue. The analytical methodology and due diligence records are available on request.

Report generated by Site Intelligence™, PF & Co Holdings Ltd. Data sources queried automatically from public datasets. Verification URLs link to the authoritative public data source where the underlying data can be independently confirmed.

PREPARED FOR **Sample Client**

PREPARED BY

Site Intelligence

PF & Co Holdings Ltd

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