
Sustainability & Energy Statement

Tier 1 – Desktop intelligence

Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG

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

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1 Abbreviations

Abbreviation	Definition
AD F	Approved Document F (Ventilation)
AD L	Approved Document L (Conservation of fuel and power)
BER	Building Emission Rate (non-domestic)
BPER	Building Primary Energy Rate (non-domestic)
BREEAM	Building Research Establishment Environmental Assessment Method (V7 from 2025)
DER	Dwelling Emission Rate
FBS	Future Buildings Standard (commences 24 March 2027 — Building Circular 01/2026)
FHS	Future Homes Standard (commences 24 March 2027; HRB-related provisions 24 September 2027 — Building Circular 01/2026)
GLA	Greater London Authority
GWP	Global Warming Potential
HEM	Home Energy Model (delayed at least 3 months post-FHS launch)
HRB	Higher-Risk Building (Building Safety Act 2022)
LETI	Low Energy Transformation Initiative
NPPF	National Planning Policy Framework
PHPP	Passivhaus Planning Package
RIBA 2030	RIBA 2030 Climate Challenge
SAP 10.3	Standard Assessment Procedure 10.3 (sole approved methodology at FHS launch)
SBEM	Simplified Building Energy Model (non-domestic)
SI 2	London Plan Policy SI 2 — Minimising greenhouse gas emissions
SI 3	London Plan Policy SI 3 — Energy infrastructure
TER	Target Emission Rate
TFEE	Target Fabric Energy Efficiency rate (dwellings)
TPER	Target Primary Energy Rate
WLC	Whole-Life Carbon

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.

Desktop Intelligence: Sustainability and Energy

This sustainability and energy assessment presents desktop intelligence compiled from authoritative public data sources available at the date of review. This assessment is not a SAP or SBEM calculation and does not constitute a formal energy strategy or Part L compliance report. It is based on published Building Regulations requirements, the Future Homes Standard trajectory, local plan sustainability policies, and published grid carbon intensity data. It is subject to the data gaps, assumptions and limitations stated in this report.

Site Intelligence is prepared to have this assessment reviewed and verified by a suitably qualified energy consultant. For formal planning submission, this assessment should be verified by a Member of the Chartered Institution of Building Services Engineers (MCIBSE) or equivalent. This represents the desktop strategy stage of a staged delivery process; specialist sign-off should follow before submission.

3 Introduction

This report has been prepared by Site Intelligence (PF & Co Holdings Ltd) on behalf of **Sample Client** in respect of Land north of Corefields, Sidford — Outline for 15 Dwellings, EX10 9SG.

Site	Land north of Corefields, Sidford — Outline for 15 Dwellings
Address	Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG
Client	Sample Client
LPA	East Devon District Council
Proposal	Residential development for up to 15 dwellings
Document Reference	999-DEMO-2026 -PFCO-REP-SustainabilityEnergy-R01
Date	10 May 2026
Revision	R01

This Sustainability & Energy Statement has been prepared to demonstrate how the proposed development addresses energy efficiency, carbon reduction, and sustainability requirements in accordance with national and local planning policy.

4 Executive Summary

TIER-1 DESKTOP REPORT — LIMITATION & SCOPE NOTICE: This Tier-1 desktop report is suitable for early client-side decision-making and consultant briefing. It is NOT a formal submission document and must be verified or replaced by the relevant qualified specialist report where required by the LPA or statutory consultees. The overall pack recommendation set out in the cover letter is the controlling instruction; this report is one input within that recommendation. Fibre-to-the-premises is estimated available; early engagement with Openreach is recommended.

Site Address	Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG
Postcode	EX10 9SG
Local Planning Authority	East Devon District Council
Proposal	Residential development for up to 15 dwellings
Proposed Units	15
Client / Applicant	Sample Client
Document Reference	999-DEMO-2026 -PFCO-REP-SustainabilityEnergy-R01
Report Date	10 May 2026

5 Policy Framework

The proposed development is intended to be capable of compliance with the following national and local sustainability and energy policy framework, subject to detailed design and statutory verification.

5.1 National Policy

Policy / Standard	Requirement
NPPF Chapter 14	Meeting the challenge of climate change, flooding, and coastal change
Building Regulations Part L (2021)	Conservation of fuel and power — 31% carbon reduction over 2013 standard
Building Regulations Part O (2022)	Overheating mitigation in new residential buildings
Building Regulations Part S (2022)	Infrastructure for charging electric vehicles
Building Regulations Part G	Water efficiency — 125 litres per person per day (110 l/p/d where specified)
Future Homes Standard (commences 24 March 2027 — Building Circular 01/2026)	Carbon-reduction trajectory and no-fossil-fuel heating expected; HRB-related provisions commence 24 September 2027
Environment Act 2021	10% biodiversity net gain; resource efficiency

5.2 Local Policy

The local sustainability and energy policy framework for East Devon District Council has not been compiled at Tier 1. The following minimum local-policy checklist must be completed at pre-application engagement.

Local source	Tier 1 finding	Relevance	Next action
East Devon District Council adopted Local Plan / Core Strategy	to be confirmed	Sets adopted climate / sustainable construction policy	Pull exact policy wording at pre-app
East Devon District Council emerging Local Plan	to be confirmed	Direction-of-travel material; weight depends on examination stage	Confirm stage and apply NPPF Dec 2024 paragraph 49weight test
East Devon District Council sustainable construction SPD / supplementary guidance	to be confirmed	May guide fabric, renewables and water-efficiency targets	Confirm adopted vs draft status; obtain current wording
East Devon District Council application validation checklist	to be confirmed	Determines whether a sustainability/energy statement is required at submission	Cross-check current validation list against scheme size

Local source	Tier 1 finding	Relevance	Next action
East Devon District Council water-efficiency policy (optional Part G 110 I/p/d)	to be confirmed	Determines whether 110 I/p/d optional Part G commitment must be made up-front	Confirm whether 110 I/p/d is sought; design accordingly
East Devon District Council climate emergency declaration / action plan	to be confirmed	Material consideration in the planning balance for low-carbon schemes	Include current Climate Emergency stance in the planning case

6 Existing Site Baseline

This section establishes the baseline energy and environmental conditions of the site prior to development.

Current Use	Undeveloped greenfield
Site Area	1.08 ha
Existing Buildings	None on site
Existing EPC Rating	N/A — no existing buildings
Grid Connection	National Grid Electricity Distribution
DNO Headroom	Data not available — formal DNO enquiry required to confirm site-specific connection capacity

7 Energy Hierarchy

The energy strategy for this development follows the established energy hierarchy: Be Lean (reduce demand through fabric performance), Be Clean (supply energy efficiently), and Be Green (generate energy from renewable sources). This approach aligns with established best practice and is endorsed by most local planning authorities for demonstrating compliance with energy policies.

7.1 Be Lean — Fabric First

Element	Target Performance
External Walls	U-value: 0.18 W/m ² K or better
Floor	U-value: 0.13 W/m ² K or better
Roof	U-value: 0.13 W/m ² K or better
Windows	U-value: 1.2 W/m ² K or better (triple glazing where feasible)
Doors	U-value: 1.0 W/m ² K or better
Air Tightness	Target: 3.0 m ³ /h/m ² at 50Pa (Building Regs: 5.0)
Thermal Bridging	Accredited construction details or calculated psi-values

7.2 Be Clean — Efficient Supply

The development will utilise efficient heating systems. In line with the trajectory towards the Future Homes Standard, fossil fuel heating (gas boilers) should be avoided in favour of heat pump technology.

System	Provision
Primary Heating	Air Source Heat Pump (ASHP) — individual units per dwelling
Hot Water	ASHP with hot water cylinder (minimum 170L)
Ventilation	MVHR (Mechanical Ventilation with Heat Recovery) — SFP ≤ 0.5 W/l/s
Lighting	100% LED — average efficacy > 100 lumens/watt
Smart Controls	Smart thermostat and zoning as standard

8 Renewable Energy Assessment

The following renewable and low-carbon energy technologies have been assessed for suitability at this site.

Technology	Suitability	Notes
Air Source Heat Pump	SUITABLE	Primary heating and hot water — COP 3.0+
Solar PV	SUITABLE	Suitable in principle — roof-mounted panels, indicative 2 kWp per dwelling subject to roof orientation, shading, roof form, grid export and SAP optimisation
Solar Thermal	CONSIDER	May be superseded by ASHP + PV combination
Ground Source Heat Pump	CONSIDER	Higher efficiency but greater upfront cost
Wind Turbine	NOT SUITABLE	Typically unsuitable for residential scale
Biomass	NOT SUITABLE	Air quality concerns; not compatible with net zero trajectory
Battery Storage	CONSIDER	Enhances PV self-consumption — consider as option

Future Homes Standard Readiness
CLIMATE & ENERGY

GAP
Overall

FHS Commencement: December 2026

Dwellings designed now but not started before this date must comply with FHS

ELEMENT	CURRENT SPEC	PART L 2021	FHS REQ.	STATUS
Space Heating	Gas boiler (Part L 2021)	Part L 2021	Air source heat pump (ASHP)	GAP
Hot Water	Gas combi boiler	Part L 2021	Heat pump or direct electric	GAP
Ventilation	Intermittent extract (Part F)	Part F 2021	MVHR or enhanced extract	GAP
Fabric Performance	U-values per Part L 2021	Part L 2021	Enhanced U-values (FHS notional)	GAP
EV Charging	15 dwellings x 7.0kW Mode 3 (Approved Doc S)	Approved Doc S	Mode 3 (7kW min) per dwelling	GAP
Solar PV	Not currently required	Part L 2021	PV contribution to meet CO2 target	GAP

Grid load: 66.6kW total additional demand.

Data: Future Homes Standard (2025-consultation), grid-capacity enrichment

Future Homes Standard Readiness

9 Grid Capacity

The transition to electric heating (heat pumps) and EV charging increases electricity demand. The capacity of the local electricity network is a material consideration for the energy strategy.

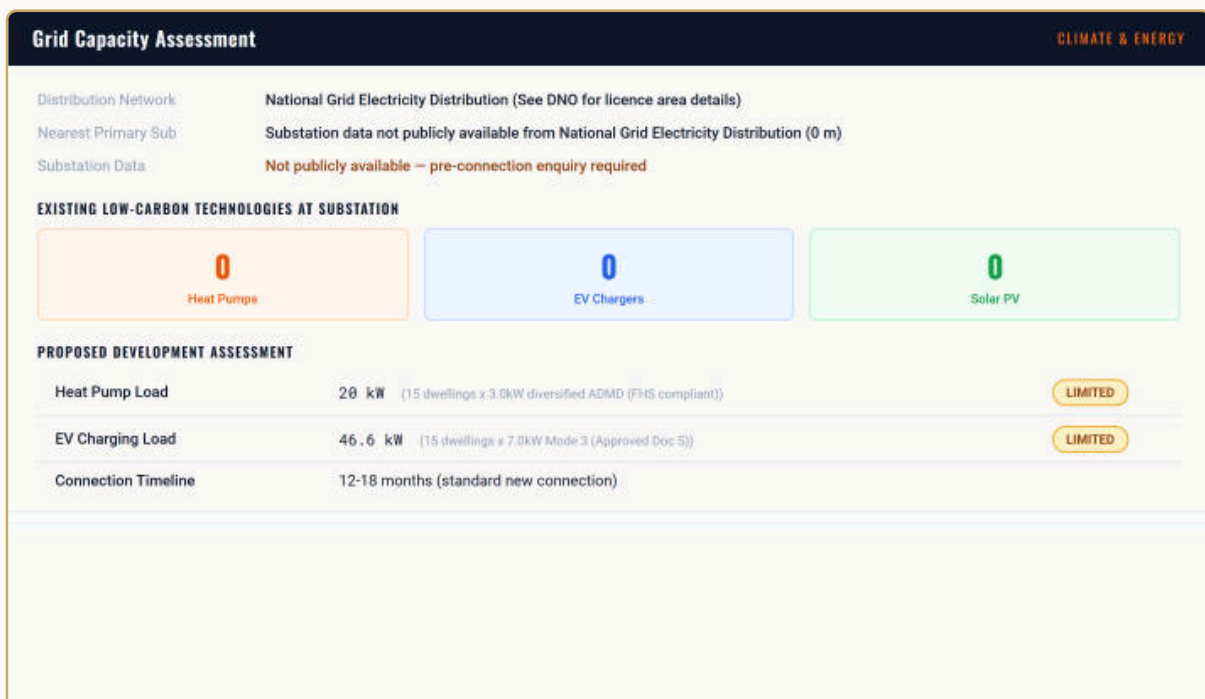
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Distribution Network Operator	National Grid Electricity Distribution
Nearest Primary Substation	Substation data not publicly available from National Grid Electricity Distribution
Substation Capacity RAG	AMBER — moderate constraint
Substation Headroom (MVA)	0.0 MVA — substation reported full at this DNO refresh; pre-application engagement required
Proposed Development Load (kW, diversified)	66.6 kW
Connection Risk	Moderate — capacity constrained, formal enquiry essential
Recommended Next Action	Formal DNO connection enquiry to confirm point of connection, capacity and cost (allow 12-24 months for any reinforcement)

Substation capacity is constrained. A formal connection enquiry to National Grid Electricity Distribution should be submitted at the earliest opportunity to confirm the available capacity and connection cost.



Grid Capacity Panel

Note: the chart presents indicative component loads (heat pump, EV, domestic) on a per-dwelling basis. The reported 66.6 kW diversified development load reflects the aggregate Tier-1 allowance for the scheme dwelling count, including heat pump, EV charging and domestic-demand diversity. Per-component figures and the diversified total are not arithmetically additive. Final regulated load is subject to M&E design and DNO confirmation.

Reading the “existing low-carbon connections” panel

Where the chart shows zero heat pumps, zero EV chargers or zero solar PV under “existing low-carbon technologies at substation”, this reflects the **public data screen** of existing connections at the relevant primary substation. It does **not** mean the proposed scheme has zero heat pumps, zero EV chargers or zero PV — those proposed-scheme measures are listed separately in the renewable- energy and energy-hierarchy tables in this report. A formal DNO enquiry will return an authoritative connections-and-headroom position for the substation.

10 Carbon Reduction

The proposed energy strategy is anticipated to achieve a carbon reduction beyond the minimum Building Regulations Part L (2021) requirement. The combination of enhanced fabric performance, heat pump technology, and solar PV provides a pathway to exceed the 31% improvement over the 2013 Part L standard.

Strategy Element	Carbon Reduction Contribution
Enhanced Fabric (Be Lean)	10-15% reduction through improved U-values and air tightness
Heat Pump (Be Clean)	15-25% reduction vs gas boiler baseline (COP 3.0+)
Solar PV (Be Green)	5-10% reduction (dependent on array size and orientation)
MVHR	Additional reduction through heat recovery ventilation
LED Lighting	Additional reduction through efficient fixed lighting

These indicative reductions are not arithmetically additive and do not represent a calculated regulated carbon saving. The figures shown are Tier-1 design-brief contributions from each strategy element; final performance must be confirmed through SAP / SBEM once dwelling geometry, specification, systems and orientation are fixed.

A SAP/SBEM calculation should be carried out at detailed design stage to confirm the carbon reduction achieved and demonstrate compliance with Building Regulations Part L. The Target Emission Rate (TER) and Dwelling Emission Rate (DER) should be confirmed.

11 Water Efficiency

The proposed development will be designed to achieve a water consumption rate of 110 litres per person per day (l/p/d) in accordance with the optional Building Regulations requirement (where imposed by planning condition). The baseline Building Regulations requirement is 125 l/p/d.

Measure	Provision
WC	Dual flush 4/2.6 litres
Basin Taps	Flow rate ≤ 5 litres/minute
Shower	Flow rate ≤ 8 litres/minute
Bath	Maximum capacity 170 litres

Measure	Provision
Kitchen Sink	Flow rate \leq 6 litres/minute
Washing Machine	Water-efficient rated (\leq 8.5 l/kg)
Rainwater Harvesting	Consider for garden irrigation (subject to feasibility)

12 Materials & Waste

The proposed development will incorporate sustainable material selection and waste reduction measures during construction and occupation.

Measure	Detail
Responsible sourcing	Timber from FSC/PEFC certified sources
Recycled content	Minimum 20% recycled aggregate in concrete
Waste reduction	Off-site manufacture / modern methods of construction where feasible
Construction waste	Minimum 90% diversion from landfill (see CMP)
Operational waste	Adequate bin storage for separate recycling streams
Demolition / clearance materials	Pre-demolition / pre-clearance audit where any existing structures, hardstanding, agricultural remains or reusable materials are present

13 Overheating Risk

In accordance with Building Regulations Approved Document O (2022), the proposed development must be assessed for overheating risk. The simplified method or dynamic thermal modelling (CIBSE TM59) should be used to demonstrate compliance.

Measure	Provision
Glazing ratio	Limit south/west facing glazing to reduce solar gain
Solar shading	External shading devices where glazing ratio exceeds thresholds
Cross-ventilation	Dual-aspect units preferred; adequate openable window area
Purge ventilation	Openable windows providing rapid heat dissipation

Measure	Provision
Thermal mass	Medium to high thermal mass construction to moderate temperature swings
Internal blinds	May assist occupant comfort but should not be relied upon as the primary Part O mitigation measure — design-led measures (orientation, glazing ratio, external shading, cross-ventilation, thermal mass) take priority

Overheating risk assessment should be carried out at detailed design stage using either the simplified method in Approved Document O or dynamic thermal modelling to CIBSE TM59. Where overheating risk is identified, mitigation measures should be designed to achieve compliance without reliance on mechanical cooling.

14 Building Regulations Compliance — Part L

The proposed development should be capable of being designed to comply with Building Regulations 2010 Approved Document L: Conservation of Fuel and Power (2021 edition, with 2023 amendments), which requires a 31% reduction in carbon emissions compared to the 2013 Part L standard. Final regulated performance must be confirmed by SAP modelling at detailed design stage.

Requirement	Compliance Route
Part L1 (2021)	SAP calculation demonstrating DER ≤ TER
Primary Energy	Dwelling primary energy rate ≤ target primary energy rate
Fabric Energy	Minimum fabric energy efficiency standards met
Part O (2022)	Overheating risk assessment (simplified or TM59)
Part S (2022)	EV charging infrastructure — 1 charge point per dwelling
Part G (Water)	110 l/p/d where required by planning condition
Part F (Ventilation)	MVHR or equivalent compliant ventilation strategy

15 Compliance Summary

The following table summarises the development’s compliance with applicable energy and sustainability standards.

Standard	Requirement	Compliance
Building Regulations Part L (2021, with 2023 amendments)	31% CO ₂ reduction over Part L 2013 — capable of compliance subject to SAP	CAPABLE OF COMPLIANCE
Building Regulations Part O (2022)	Overheating risk to be assessed once layout, orientation and glazing are confirmed	TO BE ASSESSED
Building Regulations Part S (2022)	EV charging infrastructure provision should be incorporated; final route subject to layout	CAPABLE OF COMPLIANCE
Water Efficiency (Part G optional 110 l/p/d)	110 litres/person/day target where required by planning condition	CAPABLE OF COMPLIANCE
Future Homes Standard (commences 24 March 2027)	Design should align with the incoming standard subject to transitional provisions	DESIGN ALIGNMENT REQUIRED

16 Constraint Analysis

Constraint	Status	Statutory anchor / NPPF
AONB / National Landscape	Engaged	NPPF 189-191
Scheduled Monument	Engaged	Ancient Monuments Act 1979

17 Policy Analysis

17.1 National policy (NPPF Dec 2024)

The substantive sections of this report apply the relevant NPPF Dec 2024 paragraphs to the site context — refer to in-text citations and the bibliography for the full list of paragraphs relied on.

17.2 Local policy (East Devon District Council Local Plan)

Local plan policy analysis is provided in the substantive sections where each policy is engaged. The full list of East Devon District Council Local Plan policies relevant to this proposal is set out in the bibliography.

18 Risk Assessment

Risk register not yet populated for this report. The substantive sections that follow contain risk-relevant evidence. A consolidated risk register is provided in the **Risk Summary Sheet** (where bundled) or can be commissioned as an add-on.

19 Recommended Next Steps

Specific next steps for this report are set out in the Conclusions section. For a consolidated cross-bundle action list, see the **Next Steps** report (where bundled) or commission as an opt-in add-on.

20 Conclusions

This Tier 1 Sustainability & Energy Statement identifies a credible design pathway for the proposed development at Land to the north of Corefields, Sidford, Sidmouth, EX10 9SG to achieve a high standard of sustainability and energy efficiency, subject to detailed architectural design, SAP verification, Part O overheating assessment, formal grid-connection confirmation and statutory approval.

- Fabric-first targets above Part L 2021 minimum (subject to SAP confirmation)
- Recommended heating strategy: heat pump (low-temperature) sized to design heat loss; gas-free in line with Future Homes Standard direction
- Recommended renewable provision: roof-mounted PV at orientation suited to roof form; capacity to be sized at SAP stage
- Recommended water efficiency target: 110 l/p/d where required by planning condition (Approved Document G optional)

- Recommended EV charging infrastructure: Part S 2022 compliant — final routing subject to scheme layout

Sustainability & Energy Assessment

The proposed energy strategy should be capable of being designed to comply with Building Regulations Part L (2021, with 2023 amendments) subject to detailed design and SAP verification, and positions the development on trajectory towards the Future Homes Standard (commences 24 March 2027 per Building Circular 01/2026). SAP/SBEM calculations should be carried out at detailed design stage to confirm the carbon reduction achieved and demonstrate compliance.

21 General Desktop Limitations

21.1 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

21.2 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

21.3 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

21.4 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)

21.5 Changes That Would Require Update

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

- Future Homes Standard commences 24 March 2027 (Building Circular 01/2026); HRB-related provisions commence 24 September 2027
- Part L Building Regulations updated
- Local carbon reduction policy targets revised
- District heating network connection becomes available
- SAP methodology updated (SAP 10 to SAP 11 or later)
- Renewable energy technology costs change materially affecting viability

22 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.

22.1 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.

22.2 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

23 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.

24 Update Triggers

Validity Period: 6 months from date of issue, or until Building Regulations update.

Sustainability & Energy Statement is valid for 6 months from date of issue, or until Building Regulations update. 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.

- Future Homes Standard commences 24 March 2027 (Building Circular 01/2026); HRB-related provisions commence 24 September 2027
- Part L Building Regulations updated
- Local carbon reduction policy targets revised
- District heating network connection becomes available
- SAP methodology updated (SAP 10 to SAP 11 or later)
- Renewable energy technology costs change materially affecting viability

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.

25 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.

2. Purpose Limitation

This report has been prepared solely for the purpose stated herein. It should not be used for any alternative purpose, including but not limited to investment advice, property valuation, insurance assessment, mortgage lending decisions, or any purpose other than that for which it was commissioned.

3. Third-Party Exclusion

This report does not confer any rights or benefits on any third party under the Contracts (Rights of Third Parties) Act 1999 or otherwise. No third party may enforce any term of this report.

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 sustainability-energy 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

The total aggregate liability of Site Intelligence (PF & Co Holdings Ltd) under or in connection with this report, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, shall not exceed the lesser of £1,000,000 or ten times the professional fee paid for this instruction. Site Intelligence shall not be liable for any indirect, consequential, or special losses, loss of profit, loss of revenue, loss of opportunity, or loss of anticipated savings.

10. Copyright and Intellectual Property

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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 6 months from date of issue, or until Building Regulations update 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

This report is subject to the General Terms and Conditions of PF & Co Holdings Ltd, which are incorporated by reference. A copy is available on request.

Product-Specific Note

This Sustainability & Energy Statement 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

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FOR AND ON BEHALF OF

Site Intelligence™

PF & Co Holdings Ltd

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