MID SUSSEX
DISTRICT COUNCIL

Local Plan Viability Study
2026 Update Note

June 2026

HDH Planning & Development

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1. Introduction

1.1 HDH Planning & Development Ltd (HDH), produced the *Mid Sussex District Council Local Plan Viability Study* (LPVS) (HDH, May 2022). The 2022 LPVS built on (and replaced) the Council's existing viability work. In December 2023 HDH produced a brief note to consider whether or not the 2022 Viability Study was up to date. A further September 2024 note was produced to replace the December 2023 note and further consider how the changes may impact on viability and whether it is necessary for the Council to fully update the viability evidence before submitting the Local Plan for examination.

1.2 This July 2026 Note has been produced, during the ongoing examination of the Mid Sussex District Plan, to answer the following question:

Is there scope to increase the affordable housing requirements in the submitted Local Plan, bearing in mind the changes in the wider policy standards and obligations that are suggested through the examination process?

1.3 This July 2026 Update Note considers, in more detail, how the changes in the submitted Plan impact on viability. This is done in the wider context of changes in national policy, and changes in the main inputs to the Viability Assessment (costs and values).

1.4 Firstly, changes to national policy are considered, then changes in house prices and build costs, before the emerging Local Plan is reviewed. This Update Note should be read as an annex to *Mid Sussex District Council Local Plan Viability Study* (HDH, May 2022). The majority of assumptions are carried forward from the 2022 LPVA unchanged.

1.5 As set out towards the end of this note, a further set of appraisals has been run that reflect the various updates and changes made.

2. Changes in National Policy

2.1 Since the 2022 LPVS was completed, numerous changes and potential changes to national policy have been announced. To a large extent, these were addressed in the earlier notes. Some changes are as a result of the change in Government following the 2024 General Election, and others are carried forward from the wider updating of national policy.

National Planning Policy Framework

2.2 The 2022 LPVS was carried out in line with the, then current National Planning Policy Framework (NPPF). Since then, the NPPF has been updated.

2.3 The extant NPPF was published in December 2024 (and was further updated in February 2025[1]). This NPPF made some significant changes to the planning system, particularly to the way the overall requirement for housing is assessed (the Standard Method), however, it did not change the place of viability testing in the plan-making process, and the detail beyond that is largely unchanged.

2.4 In December 2025, the Government published a further draft NPPF[2] for consultation. The draft NPPF is a comprehensive re-write of the national planning policy, making a number of significant changes to the planning system, including the new national decision-making policies. It is proposed that these national decision-making policies are '*read alongside the policies in the development plan*' and are a material consideration when determining planning applications.

2.5 For the purpose of this Update Note, the draft NPPF carries forward the requirements to carry out a plan-wide viability assessment, and to ensure that the new Local Plan will deliver, making it clear that allocations for development must be viable:

> *PM9: Identifying land for Development*
>
> *2. For plans that allocate specific sites for development the assessment should be undertaken with reference to national guidance and include:*
>
> *a. A thorough site identification process to identify a sufficient range and quantity of potential sites;*
>
> *b An assessment of the availability, suitability and achievability (including likely viability) of those sites;*
>
> *c. An assessment of the amount of development those sites have the potential to accommodate and the potential timescales over which development could be delivered16; and*
>
> *d. The identification of the most appropriate sites for development taking into account the emerging vision and spatial strategy of the plan and the information above.*

[1] The December 2024 version of the National Planning Policy Framework was amended in February 2025 to correct cross-references from footnotes 7 and 8, and amendments to the end of the first sentence of paragraph 155 to make its intent clear.

[2] National Planning Policy Framework: proposed reforms and other changes to the planning system - GOV.UK

2.6 The draft NPPF also includes proposals to move or duplicate some of the text currently in the PPG, that relates to viability, into the body of the NPPF, thus giving it more weight. Annex B of the explanatory document sets out the reasoning behind the proposed changes in the draft NPPF, headed '*Viability: Standardised inputs in viability assessment*' says:

> *Standardised inputs to viability assessments provide a consistent framework for evaluating development proposals and ensure both authorities and developers have greater certainty in the viability assessment process.*
>
> *The government is therefore proposing moving the current Planning Practice Guidance sub-section on 'Standardised inputs to viability assessment' into an annex to the draft Framework, and updating where needed, to support the proposed policies PM12, DM5 and GB8 above, subject to views received. The remainder of the existing viability PPG would remain in guidance. The proposed updates seek to support greater consistency, upfront clarity for all interested parties, and reduce the need for negotiation at the decision-making stage. At the same time, the proposals seek to ensure the system remains sufficiently responsive to different development types and risk profiles, to ensure development can proceed.*

2.7 The consultation also sought views on changes in relation to growth testing, developer's returns and benchmark land values. The methodology used in this Update Note is consistent with the extant December 2024 NPPF, and whilst the Local Plan is to be examined under the transitional arrangements, under the 2023 NPPF, appropriate regard is also had to the draft NPPF.

2.8 Paragraph 35 of the NPPF says that plans should set out what development is expected to provide, and that the requirement should not be so high as to undermine the delivery of the plan. This requirement is unchanged.

The Golden Rules

2.9 The extant NPPF includes various sections (Paragraphs 67, 68, 155, 156 and 157) concerning releasing land from the Green Belt. Such releases are subject to the Golden Rules which require that the affordable housing contribution, on such releases, to be 15% above the highest existing affordable housing requirement which would otherwise apply to the development, subject to a cap of 50%. There are several very small slithers of Green Belt in the north of the District (to the north of Copthorne and East Grinstead). No development is planned in these areas so, so these rules are not a material consideration for this Update Note.

Planning Practice Guidance

2.10 The December 2025 consultation on the draft NPPF asks a number of questions in relation to viability, including views on changes in relation to growth testing, developer's returns and benchmark land values. It does not propose new wording. It will be necessary to keep these under review.

Viability and plan making

2.11 The viability sections of the PPG (Chapter 10) were rewritten in 2018, and subsequently further updated. The changes provide clarity and confirm best practice, rather than prescribe a new approach or methodology. Having said this, the underlying emphasis of viability testing was unchanged.

2.12 The overall requirement was updated in December 2025:

> *How should plan makers set policy requirements for contributions from development?*
>
> *Plans should set out the contributions expected from development. This should include setting out the levels and types of affordable housing provision required, along with other infrastructure (such as that needed for education, health, transport, flood and water management, green and digital infrastructure). This should include the minimum proportion of Social Rent homes required.*
>
> *These policy requirements should be informed by evidence of infrastructure and affordable housing need, including the need for those who require Social Rent, and a proportionate assessment of viability that takes into account all relevant policies, and local and national standards, including the cost implications of the Community Infrastructure Levy (CIL) and section 106. Policy requirements should be clear so that they can be accurately accounted for in the price paid for land. To provide this certainty, Social Rent and other types of affordable housing requirements should be expressed as a single figure rather than a range. Different requirements may be set for different types or location of site or types of development.*
>
> *PPG 10-001-20251216*

2.13 The 2022 LPVS took a proportionate approach, building on the Council's existing evidence, and considers all the local and national policies that will apply to new development.

> *The role for viability assessment is primarily at the plan making stage. Viability assessment should not compromise sustainable development but should be used to ensure that policies are realistic, and that the total cumulative cost of all relevant policies will not undermine deliverability of the plan. … Policy requirements, particularly for affordable housing, should be set at a level that takes account of affordable housing and infrastructure needs and allows for the planned types of sites and development to be deliverable, without the need for further viability assessment at the decision making stage.*
>
> *PPG 10-002-20251216*

2.14 Whilst the wording was updated, the overall requirement remains similar. The emerging policy options that were under consideration by the Council were be tested individually and cumulatively, to ensure that when taken together, that they are set at an appropriate level.

> *It is the responsibility of land owners, site promoters and developers to engage in plan making, take into account any costs including their own profit expectations and risks, and ensure that proposals for development are policy compliant. Policy compliant means development which fully complies with up to date plan policies. A decision maker can give appropriate weight to emerging policies. The price paid for land is not a relevant justification for failing to accord with relevant policies in the plan. Landowners and site purchasers should consider this when agreeing land transactions.*
>
> *PPG 10-002-20251216*

2.15 The Council has continued to engage with the promoters of the key sites in the Plan.

> *Assessing the viability of plans does not require individual testing of every site or assurance that individual sites are viable. Plan makers can use site typologies to determine viability at the plan making stage. Assessment of samples of sites may be helpful to support evidence. In some circumstances more detailed assessment may be necessary for particular areas or key sites on which the delivery of the plan relies.*
>
> *PPG 10-003-20180724*

2.16 The 2022 LPVS was based on typologies[3] that were developed by having regard to the potential sites that are most likely to be included in the emerging Plan. 4 potential Significant Sites were also modelled, so as to inform a decision (when taken with wider evidence) as to whether or not they were to be included in the final iteration of the Local Plan. These potential Significant Sites were modelled based on information provided by the Council, and are now retested, based on the latest information in this Update Note.

> *Plan makers should engage with landowners, developers, and infrastructure and affordable housing providers to secure evidence on costs and values to inform viability assessment at the plan making stage.*
>
> *It is the responsibility of site promoters to engage in plan making, take into account any costs including their own profit expectations and risks, and ensure that proposals for development are policy compliant. Policy compliant means development which fully complies with up to date plan policies. A decision maker can give appropriate weight to emerging policies. It is important for developers and other parties buying (or interested in buying) land to have regard to the total cumulative cost of all relevant policies when agreeing a price for the land. Under no circumstances will the price paid for land be a relevant justification for failing to accord with relevant policies in the plan.*
>
> *PPG 10-006-20190509*

2.17 Consultation formed part of the preparation of the 2022 LPVS, and the comments made through the formal consultations on the draft Plan.

Viability and decision taking

2.18 As mentioned above, the December 2025 consultation on the draft NPPF includes proposals to move or duplicate sections of the text currently in the PPG that relate to viability, into the body of the NPPF, thus giving it more weight.

Standardised inputs to viability assessment

2.19 Several sections have been updated, although the 2022 LPVS remains consistent with the changes. The PPG sets out how land values should be considered, confirming the use of the Existing Use Value Plus (EUV+) approach.

> *To define land value for any viability assessment, a benchmark land value should be established on the basis of the existing use value (EUV) of the land, plus a premium for the landowner. The premium for the landowner should reflect the minimum return at which it is considered a reasonable landowner would be willing to sell their land. The premium should provide a reasonable incentive, in comparison with other options available, for the landowner to sell land for development while allowing a sufficient contribution to comply with policy*

[3] The PPG provides further detail at 10-004-20190509:

A typology approach is a process plan makers can follow to ensure that they are creating realistic, deliverable policies based on the type of sites that are likely to come forward for development over the plan period.

In following this process plan makers can first group sites by shared characteristics such as location, whether brownfield or greenfield, size of site and current and proposed use or type of development. The characteristics used to group sites should reflect the nature of typical sites that may be developed within the plan area and the type of development proposed for allocation in the plan.

requirements. Landowners and site purchasers should consider policy requirements when agreeing land transactions. This approach is often called 'existing use value plus' (EUV+).

PPG 10-014-20190509

2.20 The PPG goes on to set out:

Benchmark land value should:

- *be based upon existing use value*
- *allow for a premium to landowners (including equity resulting from those building their own homes)*
- *reflect the implications of abnormal costs; site-specific infrastructure costs; and professional site fees*

Viability assessments should be undertaken using benchmark land values derived in accordance with this guidance. Existing use value should be informed by market evidence of current uses, costs and values. Market evidence can also be used as a cross-check of benchmark land value but should not be used in place of benchmark land value. There may be a divergence between benchmark land values and market evidence; and plan makers should be aware that this could be due to different assumptions and methodologies used by individual developers, site promoters and landowners.

This evidence should be based on developments which are fully compliant with emerging or up to date plan policies, including affordable housing requirements at the relevant levels set out in the plan. Where this evidence is not available plan makers and applicants should identify and evidence any adjustments to reflect the cost of policy compliance. This is so that historic benchmark land values of non-policy compliant developments are not used to inflate values over time.

In plan making, the landowner premium should be tested and balanced against emerging policies. In decision making, the cost implications of all relevant policy requirements, including planning obligations and, where relevant, any Community Infrastructure Levy (CIL) charge should be taken into account.

PPG 10-015-20190509

2.21 The December 2025 consultation on the draft NPPF asks a number of questions in relation to deriving the BLV. The approach adopted in this Update Note is to start with the EUV. The 'plus' element is informed by the price paid for policy compliant schemes to ensure an appropriate landowners' premium.

Existing use value (EUV) is the first component of calculating benchmark land value. EUV is the value of the land in its existing use. Existing use value is not the price paid and should disregard hope value. Existing use values will vary depending on the type of site and development types. EUV can be established in collaboration between plan makers, developers and landowners by assessing the value of the specific site or type of site using published sources of information such as agricultural or industrial land values, or if appropriate capitalised rental levels at an appropriate yield (excluding any hope value for development).

Sources of data can include (but are not limited to): land registry records of transactions; real estate licensed software packages; real estate market reports; real estate research; estate agent websites; property auction results; valuation office agency data; public sector estate/property teams' locally held evidence.

PPG 10-016-20190509

2.22 The methodology used in the 2022 LPVS followed this approach to establish the EUV. This approach was carried into this update.

Community Infrastructure Levy Regulations and Guidance

2.23 The Council has not adopted CIL. The CIL Regulations are broad so, in any event, it is necessary to have regard to them. The CIL Regulations have not been updated since 2020 so CIL Regulation 122 remains as being of particular importance. This sets out that payments requested under the s106 regime must be:

- necessary to make the development acceptable in planning terms;
- directly related to the development; and
- fairly and reasonably related in scale and kind to the development.

Wider Changes Impacting on Viability

2.24 The draft NPPF includes proposals to move or duplicate some of the text currently in the PPG, that relates to viability, into the body of the NPPF, thus giving it more weight. The consultation then seeks views on changes in relation to growth testing, developer's returns and benchmark land values. It will be necessary to keep this under review.

2.25 There have been several changes at a national level over the last few years that are timely to mention.

Accessible and Adaptable Standards

2.26 In July 2022, the Government announced the outcome of the 2020 consultation on raising accessibility standards of new homes[4]. At that time the Government said that it intended to mandate M4(2) (Category 2: Accessible and Adaptable dwellings) requirement in Building Regulations as a minimum standard for most new homes. This was reflected in the appraisals in the 2022 LPVS and subsequent notes.

2.27 In the draft NPPF, under policy *HO5: Meeting the needs of different groups*, the Government proposed the following text:

> *In relation to accessible housing, setting out the proportion of new housing that should be delivered to requirement M4(2) and M4(3) of the Building Regulations. M4(2) requirements should reflect local levels of need,and should ensure that at least 40% of new housing delivered over the course of the plan is delivered to M4(2) or M4(3) standards.*

2.28 The requirement tested in the 2022 LPVS was for 5% of market housing to be (M4)3a standard, 4% of affordable housing to be (M4)3b standard, and the balance to be M4(2) standard.

2.29 This policy has been updated to align with the draft NPPF and includes 40% to be M4(2) standard.

[4] Raising accessibility standards for new homes: summary of consultation responses and government response - GOV.UK (www.gov.uk)

Environmental Standards

2.30 In the spring of 2024, the Government carried out a consultation on how national standards may be changed as part of the move to Zero Carbon. The Department of Levelling Up, Communities and Housing published revisions to Conservation of Fuel and Power, Approved Document L of the Building Regulations as a 'stepping stone' on the pathway to Zero Carbon homes that sets the target of an interim 31% reduction in CO_2 emissions over 2013 standards for dwellings. This is assumed to apply to all new homes in this assessment.

2.31 In 2023 the then Housing Minister made a Written Parliamentary Statement[5] which set out the Government's position in this regard. Whilst this did does not preclude the introduction of policies that go beyond national standards, this does suggest that such policies will need to be well justified and subject to greater scrutiny.

2.32 Under the draft NPPF, the Government consulted on the following text:

> ***<u>Plan-making policies</u>***
>
> ***CC1: Planning for climate change***
>
> *1 Development plans should take a proactive approach to mitigating climate change and supporting the transition to net zero30. They should also take a proactive approach to adapting to climate change, taking into account the implications of extreme weather and long-term climate trends including overheating, wildfires, drought, flood risk, coastal change, water supply, biodiversity and landscapes. They should do this by:*
>
> *a. Proposing development patterns through their spatial strategy and allocations which:*
>
> *i. can help contribute to radical reductions in greenhouse gas emissions (which can be informed by an assessment of baseline carbon emissions and the potential effect of development options on future emissions and their mitigation); and*
>
> *ii. avoid increased vulnerability and improve resilience to the effects of climate change (including through providing for necessary infrastructure improvements and the future relocation of homes and other uses where public safety would be at risk, for example as a consequence of coastal change);*
>
> *b. Addressing any specific risks from climate change in their proposed allocations for development, and necessary adaptations, both of which should be considered for the anticipated lifetime of the development;*
>
> *c. Setting local water efficiency standards for new development where these are justified in accordance with policy PM13; and*
>
> *d. Identifying opportunities for green infrastructure provision and nature-based solutions which can safeguard and improve carbon storage, support nature recovery and resilience, and which take account of Local Nature Recovery Strategies in accordance with policy N1.*

[5] Written statements - Written questions, answers and statements - UK Parliament

<u>National decision-making policies</u>

CC2: Mitigation of climate change

1. *In order to contribute to climate change mitigation and the transition to net zero, development proposals should, where relevant to the proposal:*
    a. *Be located where a genuine choice of sustainable transport modes exists, and improve opportunities for walking, wheeling, cycling and public transport, in accordance with policies TR3 and TR4;*
    b. *Support good access to facilities to limit the need to travel, whether through the development's location, through development densities which improve catchment populations for local services, or by incorporating community facilities and premises to support local employment opportunities;*
    c. *Use design approaches which conserve energy and other resources in accordance with policy DP3(1)(c);*
    d. *Take advantage of opportunities to re-use existing structures and materials, including by re-using non-contaminated excavated soil and hardcore within the site;*
    e. *Take advantage of opportunities to draw low carbon energy from decentralised networks (such as district heat networks), where these are available, and to co-locate energy and heat generators and users, especially to take advantage of suppliers of surplus heat and energy;*
    f. *Contribute to the creation or restoration of habitats which can act as carbon stores, such as through woodland planting and peatland restoration, while avoiding harm to habitats which can act as important carbon stores, including peatland and salt marsh; and*
    g. *Not increase the extraction of fossil fuels unless it is in accordance with policy M5.*
2. *Substantial weight should be given to the benefits of improving the energy efficiency of existing buildings and/or drawing energy from district heat networks, renewable and low carbon sources (including through the installation of heat pumps and solar panels where these do not already benefit from permitted development rights).*

2.33 The draft NPPF consultation also says (on page 16):

> ***6 Streamlining local standards.*** *We want to promote certainty for applicants and speed up local plan production by limiting quantitative standards in development plans to only those specific issues where local variation is justified. We also want to limit duplication of matters which are covered by the Building Regulations – other than where there is the existing ability to use 'optional technical standards'.*

2.34 The draft NPPF consultation, in Policy *PM13: Setting standards* says:

1. *Quantitative standards set through development plan policies should be limited to infrastructure provision, affordable housing requirements, parking and design and placemaking, and where this will provide clarity and a high degree of certainty about the requirements that relevant development proposals are expected to meet. Such standards should:*
    a. *Be justified, drawing upon relevant evidence of local characteristics and needs, while utilising or adapting relevant national standards where it is appropriate to do so (such as in relation to green infrastructure). Evidence in support of standards should be proportionate, in accordance with policy PM8, especially where relevant national standards already exist;*
    b. *Not cover matters which are already addressed by Building Regulations, other than in relation to:*

i. *accessibility standards, for which local standards in relation to requirement M4(2) (accessible and adaptable dwellings) and/or M4(3) (wheelchair user dwellings) of the Building Regulations should be set in line with policy HO5; or*

ii. *water efficiency, for which it may be appropriate to apply the tighter Building Regulations optional requirement where justified, or exceptionally a more stringent local standard in areas of serious water stress.*

c. *Not cover matters relating to the construction or internal layout of buildings unless they are to implement the nationally described space standard.*

2.35 The draft NPPF consultation, in Policy *PM13: Setting standards*, says:

> *In addition, the policy proposes preventing standards which cover matters already addressed by building regulations, with the exception of the established national technical standards for accessibility and water efficiency. In relation to water efficiency, the policy recognises that some areas may need to set a tighter standard than the existing optional requirement, due to the pressure on water supplies. This reflects relevant parts of the Written Ministerial Statement made on 19 December 2023 titled The Next Stage in Our Long-Term Plan for Housing Update. The Department for Environment, Food and Rural Affairs ongoing consultation on revising water efficiency standards will not affect this policy.*
>
> *Beyond these areas, the policy identifies specific areas where local standards should not be set. This includes matters relating to the construction or internal layout of buildings (other than the nationally described space standard), which the government considers are matters best left to the market to determine.*
>
> *The policy as drafted would limit local standards for energy efficiency, as we are concerned that varying standards across local plans make it difficult for the construction sector to adapt and deploy energy efficiency technologies at scale. If this specific restriction were to be taken forward following consultation, we intend to use secondary legislation to commence section 43 of the Deregulation Act 2015 to amend the Planning & Energy Act 2008 to make clear that local plans should not set higher energy efficiency standards for residential development. The draft Framework policy would also replace the policy contained in the 2023 Written Ministerial Statement titled Planning – Local Energy Efficiency Standards Update.*

2.36 The Government announced in March 2026 that it will be implementing the Future Homes Standard and Future Building Standard through Building Regulations in March 2027[6].

2.37 The Local Plan has been updated to align with the national changes and will not seek standards over and above the Future Homes Standard. This is assumed to apply in the appraisals that are presented towards the end of this note.

Biodiversity Net Gain

2.38 The Environment Act received Royal Assent in November 2021 and mandates that new developments must deliver an overall increase in biodiversity. The PPG was updated in 2024[7] in this regard. The requirement is that developers ensure habitats for wildlife are enhanced relative to pre-development state. Developers must assess the type of habitat and its condition before submitting plans and then demonstrate how they are improving biodiversity.

[6] FHBS_Circular.pdf

[7] Biodiversity net gain - GOV.UK (www.gov.uk)

2.39 Green improvements on-site are preferred (and expected), but in the circumstances where they are not possible, developers will need to provide or pay a levy by purchasing biodiversity units for habitat creation or improvement elsewhere. The mandatory BNG requirement was introduced for most major developments from February 2024, and for small sites/minor development from April 2024.

> *The definition of a minor development for the purposes of BNG is development that is not major development and includes:*
>
> - *residential development where the number of dwellings is between 1 and 9 on a site of an area 1 hectare or less, or if the number of dwellings is unknown, the site area is less than 0.5 hectares.*
> - *commercial development where floor space created is less than 1,000 square metres or total site area is less than 1 hectare.*
> - *development that is not the winning and working of minerals or the use of land for mineral-working deposits.*
> - *development that is not waste development.*

2.40 In May 2025 the Government undertook a consultation[8] on the implementation of BNG. This would introduce a '*new medium development threshold for sites between 10 and 49 homes, up to 1.0 ha in size'*. Alternatively, consideration was given to exempting all minor developments. The Government published the outcome of the consultation in April 2026[9]. As this Update Report was being completed (14th July 2026) the government announced[10] that the following changes will come into effect in August 2026:

- *introduction of the new 0.2 hectare exemption, which means that the smallest developments will not be required to do mandatory BNG (unless onsite priority habitat is negatively impacted)*
- *introduction of a new temporary development exemption, for land which is to be reinstated within a period of 5 years or less (unless onsite priority habitat is negatively impacted)*
- *modification of the biodiversity gain hierarchy for minor development, meaning that minor sites which aren't exempt from BNG (e.g. over 0.2 hectares) can choose to go straight to offsite in the first instance*
- *removal of the existing exemption for self and custom build development*

2.41 These changes were announced after the appraisals at the end of this report were run so are not reflected in the updated analysis.

2.42 The draft NPPF consultation in Policy *N1: Identifying environmental opportunities and safeguards*, says:

> *Development plans should only set local standards for biodiversity net gain which are in excess of the statutory net gain requirement where this is for specific site allocations, and is fully justified and deliverable. Any such requirements should not extend to categories of development which are exempt from statutory biodiversity net gain.*

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[8] Improving the implementation of biodiversity net gain for minor, medium and brownfield development - GOV.UK

[9] Government response and summary of responses - GOV.UK

[10] Biodiversity Net Gain: Amendments and transitional arrangements published – Environment

2.43 Pending publication of revised standards, the national requirements are unchanged.

2.44 MSDC is seeking at least 10% BNG; this includes the Significant Sites. This is assumed to apply in the appraisals that are presented towards the end of this Note.

Fire Safety Standards

2.45 The Government published the outcome in March 2024 in the updated Building Regulations[11]. The guidance makes second staircases mandatory in all new residential buildings over 18m (about 6 storeys) in England from September 2026. The modelling in the further appraisals set out at the end of this Note reflect this.

Levelling-up and Regeneration Act

2.46 The *Levelling-up and Regeneration* Act became law in 2023. Many of the measures in the Act will be implemented, in due course, through secondary legislation and / or regulations. The provisions within the Act will have a significant impact on the overall plan-making process, but they do not alter the place of viability in the current Local Plan process.

2.47 The *Levelling-up and Regeneration Act* includes reference to a new national Infrastructure Levy. The Government has announced that this will not be taken forward.

Planning Application Fees

2.48 Planning fees increase each year. The updated amounts are applied[12] in the appraisals set out at the end of this Note.

Building Safety Levy

2.49 The Building Safety Levy (BSL) was announced in February 2021 to pay for the remediation of building safety defects as part of the response to the Grenfell Tower fire. In March 2025, the Government announced that the Levy will be introduced in Autumn 2026. In Mid Sussex, the Levy, if introduced as per the consultation, would be £20.12 per sqm for brownfield land and £40.23 per sqm for greenfield land[13] and would apply to major development.

2.50 The BSL is included in the appraisals at the end of this note.

Viability Guidance

2.51 Neither the NPPF nor the PPG set out step-by-step technical guidance, although the updated PPG includes guidance in a number of specific areas. The earlier viability work drew on the *Viability Testing in Local Plans – Advice for planning practitioners* (LGA/HBF – Sir John

[11] Amendments to the Approved Documents - Approved Document B: Fire safety volumes 1 and 2 (publishing.service.gov.uk)

[12] Planning fees: annual indexation from 1 April 2026

[13] Building Safety Levy: Technical consultation response - GOV.UK

Harman) June 2012[14] (known as the Harman Guidance[15]), and followed the relevant RICS guidance being the *Financial viability in planning: conduct and reporting RICS professional statement, England* (1st Edition, May 2019) and A*ssessing viability in planning under the National Planning Policy Framework 2019 for England, GUIDANCE NOTE* (RICS, 1st edition, March 2021).

2.52 No further relevant guidance has been published.

Affordable Housing

2.53 Paragraph 65 of the extant NPPF sets out national thresholds for the provision of affordable housing. These are unchanged since 2024:

> *Provision of affordable housing should not be sought for residential developments that are not major developments, other than in designated rural areas (where policies may set out a lower threshold of 5 units or fewer). To support the re-use of brownfield land, where vacant buildings are being reused or redeveloped, any affordable housing contribution due should be reduced by a proportionate amount.*

2.54 Two requirements of earlier national policy have been dropped. Under Footnote 31 of the NPPF, the requirements for 25% for the affordable housing to be First Homes no longer applies. The requirement for 10% of all homes to be Affordable Home Ownership (as per paragraph 66 of the 2023 NPPF[16]) no longer applies.

2.55 The Council has updated its draft policy in this regard, to seek a '*mix of affordable housing tenure comprising 25% <u>intermediate housing (Low Cost Home ownership, to include shared ownership/</u> First Homes) and 75% social or affordable rented, …* In agreement with the Council, the appraisals set out at the end of this Update Note are based on 75% Affordable Rent and the balance as Affordable Home Ownership (Shared Ownership).

[14] Viability Testing in Local Plans has been endorsed by the Local Government Association and forms the basis of advice given by the, MHCLG funded, Planning Advisory Service (PAS).

[15] viability-testing-local-p-42b.pdf

[16] [ARCHIVED CONTENT]

3. Changes in House Prices

Market Housing

3.1 The residential value assumptions in the 2022 LPVS were researched and gathered in late 2021. The changes were considered in the earlier notes, however for convenience and completeness, this is taken a reference point. Since then, house prices have changed. There are a range of data sources that can be referenced; however, the Land Registry is the most complete.

Table 3.1 Change in Average House Prices

	Mid Sussex	West Sussex	South East	England and Wales
2021-12	£398,863	£359,548	£362,713	£262,577
2026-03	£436,223	£373,414	£378,515	£284,862
Change	£37,360	£13,866	£15,802	£22,285
	9.4%	3.9%	4.4%	8.5%

Source: Land Registry (June 2026)

3.2 This data shows that average prices have increased across the District. They have increased a little more than in the County or the wider South East. This data can be disaggregated and newbuild sales separated out.

Table 3.2 Change in Average Newbuild House Prices – MSDC

	Newbuild	**Existing**
2021-12	£471,040	£394,123
2026-01	£569,263	£428,646
	£98,223	£34,523
	20.9%	8.8%

Source: Land Registry (June 2026)

3.3 The Land Registry's latest data suggests that the average newbuild sale price in the District has increased by about 21% since the 2022 LPVS was completed.

3.4 The 2022 LPVS included data on newbuild price paid data sourced from Landmark (Tables 4.5 and 4.6). In this Note, similar data from Landstack is analysed, the price paid data from the Land Registry is married with the floor areas sourced from the EPC Register, for newbuild sales since the start of 2023. As set out in Table 4.4 of the 2022 LPVS, there is little data from the most recent years, the updated data has limited data from 2025 and 2026.

Table 3.3 Newbuild Price Paid Data by Year – MSDC 2023 - 2026

	Bungalow	Detached	Flats	Semi-detached	Terraced	**All**
Count						
2023	5	223	130	160	43	561
2024	2	127	53	92	59	333
2025		32	21	32	5	90
2026		1				1
All	**7**	**383**	**204**	**284**	**107**	**985**
Average of Price Paid £						
2023	£499,720	£680,481	£250,103	£475,004	£528,516	£508,888
2024	£462,500	£639,462	£315,046	£456,349	£451,516	£502,876
2025		£641,632	£246,139	£469,101	£493,660	£479,785
2026		£715,000				£715,000
All	**£489,086**	**£663,724**	**£266,567**	**£468,296**	**£484,430**	**£504,406**
Average of £ per sqm						
2023	£6,416	£4,979	£4,594	£4,776	£4,843	£4,834
2024	£6,870	£4,871	£4,810	£4,868	£4,705	£4,844
2025		£5,114	£5,025	£5,316	£4,676	£5,153
2026		£4,768				£4,768
All	**£6,546**	**£4,955**	**£4,684**	**£4,868**	**£4,759**	**£4,864**

Source: Landstack (June 2026)

3.5 The data above compares with that presented in Appendix 6 of the 2022 LPVS. This suggests that average newbuild house prices for the period 2023 to 2026 are about 10% greater than for the period 2017 to 2021 or when considered on a Gross Internal Area basis, 20% greater than for the period 2017 to 2021. Over the same period the average newbuild flat prices for the period 2023 to 2026 are about 8% less than for the period 2017 to 2021 or when considered on a Gross Internal Area basis, 7% greater than for the period 2017 to 2021.

Table 3.4 Change in Newbuild Price Paid Data – MSDC

	2017 to 2021	**2023 to 2026**	**Change**	
House	£513,998	£566,530	£52,531	10.22%
	£4,107	£4,912	£805	19.60%
Flat	£286,445	£266,567	-£19,878	-6.94%
	£4,388	£4,684	£297	6.77%

Source: Landstack (June 2026)

3.6 The above data can be disaggregated and is presented in **Appendix 1**. The data compares with that presented in Appendix 6 of the 2022 LPVS.

3.7 A survey of newbuild asking prices was carried out in October 2021. The survey data was refreshed in June 2026, when there were 115 newbuild homes being advertised for sale. The research is presented in **Appendix 2** and summarised below:

Table 3.5 Survey of Newbuild Asking Prices – June 2026.

Average £					
	Detached	Flat	Semi-detached	Terrace	All
Balcombe			£707,500		£707,500
Burgess Hill	£674,750	£300,833	£481,429		£551,000
Crawley Down	£937,500		£675,000		£780,000
Cuckfield			£649,950		£649,950
East Grinstead		£340,000			£340,000
Hassocks	£685,389		£463,333		£653,667
Haywards Heath	£533,750	£247,500	£475,000		£463,611
Lindfield	£695,714			£572,500	£638,846
Sayers Common	£641,250				£641,250
All	**£670,648**	**£312,000**	**£533,796**	**£572,500**	**£582,892**
Average £ per sqm					
	Detached	Flat	Semi-detached	Terrace	All
Balcombe			£5,874		£5,874
Burgess Hill	£5,158	£3,923	£5,164		£4,975
Crawley Down	£4,695		£5,262		£5,121
Cuckfield			£4,973		£4,973
East Grinstead		£5,206			£5,206
Hassocks	£5,237		£5,148		£5,224
Haywards Heath	£4,641		£4,948		£4,684
Lindfield	£5,407			£4,419	£4,951
Sayers Common	£5,318				£5,318
All	**£5,172**	**£4,506**	**£5,207**	**£4,419**	**£5,065**

Source: Market Survey (May 2026) (The blanks indicate where no asking price and or GIA is available).

3.8 In 2021 the asking prices started at £215,000 and went up to £775,000 (£3,319 per sqm to £5,930 per sqm). The average was about £468,457 (£4,746 per sqm). The updated data shows that the asking prices for newbuild homes start at £220,000 and go up to £1,100,000 (£3,430 per sqm to £6,092 per sqm). The average is now 24% higher at £582,892, and 7% greater when considered on a floor area basis (£5,065 per sqm).

3.9 The following values were used in the 2022 LPVS:

Table 3.6 2021 Residential Price Assumptions – £ per sqm

	North	AONB	South	Burgess Hill
Greenfield	4,300	4,400	4,600	4,100
Previously Developed Land	4,300	4,400	3,900	4,100
Flatted Development	4,100	4,000	4,600	3,700

Source: Table 4.10, 2022 LPVS

3.10 The areas were defined as follows:

a. The area to the north of the High Weald AONB, including East Grinstead.

b. High Weald AONB, which includes a number of small settlements and villages. Most development in this area will be on small greenfield sites.

c. The area to the south of the High Weald AONB, excluding Burgess Hill. Values do vary within this area; however the differences tend to be as a result of local factors. Within this area, most of the brownfield development is most likely to be with the built-up area of Haywards Heath.

d. Burgess Hill and sites adjacent to the town. Burgess Hill is a lower value area, however the villages around the town are not noticeably of lower value than the wider area.

3.11 Drawing on the information above, these values have been updated as follows:

Table 3.7 2026 Residential Price Assumptions – £ per sqm

	North	AONB	South	Burgess Hill
Housing	£4,800	£5,000	£4,900	£4,900
Flatted Development	£4,600	£4,800	£5,200	£4,700

Source: (HDH, June 2026)

Affordable Housing Values

3.12 The derivation of the value assumptions for affordable housing was set out from paragraph 4.49 of the 2022 LPVS.

3.13 In the 2022 LPVS, the assumptions were that Social Rent would have a value of £1,700 per sqm of market value (para 4.53), and Affordable Rent would have a value of £2,500 per sqm of market value (para 4.61). It was also assumed that Affordable Home Ownership units would have a value of 70% market value (para 4.63).

3.14 The assessment of values has been updated using the same method; however, the yield assumption has been increased to 4.5%. The calculations are set out in **Appendix 3**.

3.15 Whilst an updated value of £1,870 per sqm is derived for Social Rent and an updated value of £3,400 per sqm is derived for Affordable Rent, the 2022 assumptions are carried forward unchanged.

The Wider Housing Market

3.16 The development identified in the new Local Plan will be built out over many years and across development cycles. It is useful to consider how values may change in the future. There is a degree of uncertainty in the housing market as reported by the RICS. The April 2026 RICS UK Residential Market Survey[17] said:

> ***Higher mortgage rates continue to dampen buyer demand***
>
> - *Sales market activity indicators remain firmly negative*
> - *Headline house prices continue to see moderate downward pressure*
> - *Forward-looking sentiment points to a subdued picture over the months ahead*
>
> *The April 2026 RICS Residential Market Survey results continue to reflect a challenging global macroeconomic backdrop, with the associated rise in interest rate expectations weighing on buyer demand. Moreover, near-term sentiment indicators suggest that these subdued conditions are set to persist over the coming months, while the outlook for the year ahead has softened noticeably.*
>
> *From an aggregate perspective, the new buyer enquiries series registered a net balance of -34% in April. While this is marginally less downbeat than the -40% reading recorded last month, it still points to weak market momentum, with almost all regions of the UK experiencing a noticeable softening in demand.*
>
> *At the same time, the agreed sales indicator posted a net balance of -36% in the latest survey (compared with -35% previously), signalling that a firmly downward trend remains in place. Looking ahead, the near-term sales expectations balance of -32% suggests that the current muted conditions are likely to persist over the coming months. At the twelve-month horizon, sales expectations have edged into marginally negative territory (net balance of -6%), with this metric weakening progressively over each of the past three months.*
>
> *With regard to supply, the new instructions indicator recorded a broadly flat net balance of -3% in April (compared with -6% previously), suggesting that the flow of new listings coming onto the sales market was largely stagnant over the month. However, the new appraisals measure (which asks respondents to compare activity with the same period twelve months earlier) posted a net balance of -16%, down from zero last month. As such, this points to a potential slowdown in the pipeline of new instructions going forward.*
>
> *At the headline level, the house price indicator recorded a net balance of -34%, marking a further deterioration from the -25% reading seen last month. Regional results point to a growing divergence between the North and South, with more pronounced downward pressure on prices evident in London, the South East, East Anglia and the South West. By contrast, the North West and the North of England continue to post marginally positive readings for the time being. Meanwhile, house prices are still rising across Scotland and Northern Ireland.*
>
> *Returning to the aggregate level, near-term house price expectations remain negative, with a net balance of -38%, although this is less weak than the -45% reading recorded last month. Looking ahead over a twelve-month horizon, a net balance of +5% of contributors now expects prices to rise, albeit only marginally. That said, this represents the flattest reading for this series since late 2023. When broken down by region, London, the South East and East Anglia all now show moderately negative house price expectations for the year ahead (on a net balance basis).*
>
> *Across the rental market, tenant demand edged higher, with a net balance of +14% of respondents reporting an increase (from the seasonally adjusted quarterly lettings dataset). Meanwhile, the landlord instructions measure remained negative, albeit slightly less so than last quarter, registering a net balance of -17% (compared with -24% previously). Looking ahead,*

---

[17] UK Residential Market Survey

a net balance of +25% of contributors anticipates rental prices rising, broadly in line with the average reading seen over the past year.

3.17 HM Treasury brings together some of the forecasts in its regular *Forecasts for the UK economy: a comparison of independent forecasts* report[18].

Table 3.8 Consolidated House Price Forecasts

Table 2 - 2026: Growth in prices and monetary indicators (% change)

Forecasters and dates of forecasts			CPI (Q4 on Q4 year ago, %)	RPI (Q4 on Q4 year ago, %)	Average earnings (Q4 on Q4 year ago, %)	Sterling index (Jan 2005=100)	Official Bank rate (level in Q4, %)	Oil price (Brent, $/bbl)	Nominal GDP	House price inflation (Q4 on Q4 year ago, %)
City forecasters										
Barclays Capital	May	*	3.2	4.5	-	-	3.75	100.0	-	-
Berenberg	March		2.5	-	2.8	-	3.00	-	-	-
Bloomberg Economics	Dec		2.1	-	-	-	3.50	-	-	-
Capital Economics	May	*	4.0	5.3	2.4	81.3	3.75	80.0	4.0	1.5
Deutsche Bank	April		3.4	4.6	-	-	3.75	-	-	-
EY	May	*	4.1	-	-	-	3.75	95.0	5.1	-
HSBC	April		2.7	4.6	3.6	85.4	3.75	90.3	-	2.0
JP Morgan	May	*	3.5	-	-	-	4.00	-	4.2	-
KPMG	May	*	3.4	-	-	-	3.75	94.0	-	-
Natwest Markets	April		3.8	4.6	3.2	-	3.75	82.0	3.6	-
Nomura	May	*	3.4	4.0	3.0	-	4.00	-	-	-
Pantheon	Jan		2.7	2.9	4.0	-	3.50	-	-	2.0
UBS	May	*	3.6	4.1	2.5	-	3.75	-	5.0	-
Non-City forecasters										
British Chambers of Commerce	May	*	2.7	-	3.9	-	3.75	-	-	-
Beacon Economic Forecasting	May	*	3.1	3.8	3.5	83.4	4.00	88.2	4.4	1.1
CBI	Dec		2.4	2.6	2.8	-	3.50	63.6	3.9	-
CEBR	May	*	3.2	4.4	3.1	85.0	3.75	-	-	4.6
Experian Economics	May	*	4.7	5.3	3.0	-	3.75	90.4	-	0.1
Heteronomics	May	*	3.9	4.5	3.9	85.4	4.00	90.3	-	2.0
ICAEW	Jan		2.1	-	-	-	3.25	-	-	-
ITEM Club	Feb		2.3	-	-	-	3.5	-	-	2.8
Liverpool Macro Research	Jan		2.3	3.1	3.5	84.2	3.25	-	-	-
NIESR	Feb		2.2	3.3	3.7	-	3.25	-	-	-0.2
Oxford Economics	May	*	4.6	5.6	3.3	82.7	3.75	91.6	3.3	0.7
OECD	March		-	-	-	-	-	-	-	-
IMF	April		3.5	-	-	-	-	-	-	-
Average of forecasts received in the last 3 months (excludes OBR, IMF and OECD forecasts)										
Independent			3.5	4.6	3.2	83.9	3.8	90.2	4.2	1.7
Received this month (marked *)			3.6	4.6	3.2	83.6	3.8	91.2	4.3	1.7
City			3.4	4.5	2.9	83.4	3.7	90.2	4.4	1.8
Range of forecasts received in the last 3 months (excludes OBR, IMF and OECD forecasts)										
Highest			4.7	5.6	3.9	85.4	4.00	100.0	5.1	4.6
Lowest			2.5	3.8	2.4	81.3	3.00	80.0	3.3	0.1
Median			3.4	4.6	3.2	84.2	3.75	90.3	4.2	1.5
OBR	Mar		1.9	2.9	3.1	84.6	3.31	63.1	3.3	2.7

Source: Forecasts for the UK economy: a comparison of independent forecasts No 466 (HM Treasury, May 2026).

18 [Forecasts for the UK economy - GOV.UK]

3.18 Property agents Savills are forecasting the following changes in house prices, suggesting continued growth:

Table 3.9 Savills Property Price Forecasts

	2026	2027	2028	2029	2030	2026-2030
Mainstream UK	-2.0%	2.5%	5.0%	6.0%	6.0%	18.5%
South East Mainstream	-3.5%	1.5%	4.0%	5.5%	5.5%	13.4%
Prime Regional Outer Commute	-2.5%	2.0%	3.5%	4.5%	4.5%	12.4%
Prime Regional Wider South	-2.0%	2.5%	4.0%	5.0%	5.0%	15.2%
UK Rents	2.5%	2.0%	2.0%	2.5%	2.5%	12.0%

Source: Savills [19]

3.19 In this context is relevant to note that the Nationwide Building Society reported in May 2026[20]:

Annual house price growth slows in May

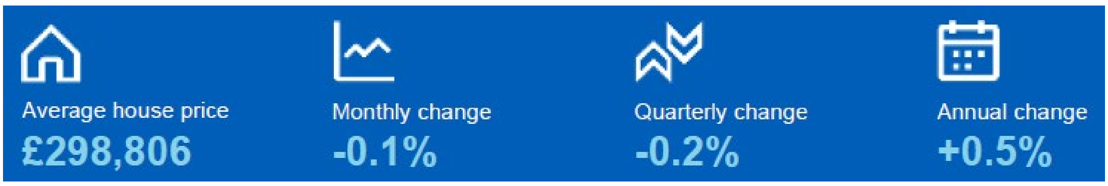
- *UK annual house price growth slowed to 1.7% in May, from 3.0% in April*
- *House prices were down 0.6% month on month*

Headlines	May-26	Apr-26
Monthly Index*	551.0	554.3
Monthly Change*	-0.6%	0.4%
Annual Change	1.7%	3.0%
Average Price (not seasonally adjusted)	£278,024	£278,880

** Seasonally adjusted figure (note that monthly % changes are revised when seasonal adjustment factors are re-estimated)*

3.20 Nationwide produces regional figures on a quarterly basis. This data suggests, for the Outer South East, an annual -0.7% change in Q1 2026 and an annual 0.1% change from the previous quarter.

3.21 Halifax Building Society reported a slightly different situation in June 2026[21]:



House prices steady in May despite broader market uncertainty

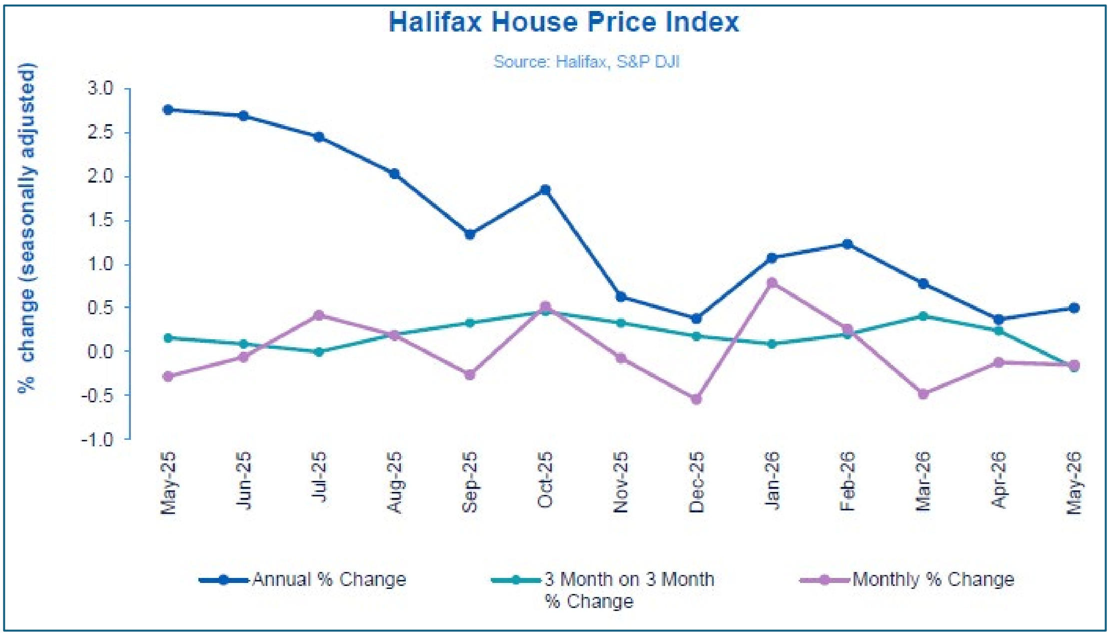
- *House prices edged down -0.1% in May, following a similar -0.1% fall in April*

[19] Savills UK | Residential Property Market Forecasts

[20] Nationwide HPI News - Reports

[21] Halifax UK | House Price Index | Media Centre

- *Average property price now £298,806, compared with £299,251 in April*
- *Annual growth up slightly to +0.5%, from +0.4% in April*
- *Northern Ireland continues to record the UK's strongest annual growth at +7.8%*



3.22 Whilst there is clearly uncertainty in the market, a degree of house price growth is anticipated.

3.23 The final section of this note includes a further set of appraisals based on the updated policy requirements, price and cost information. Sensitivity testing to changes in values has been carried out.

4. Changes in Development Costs

4.1 The build costs in the 2022 LPVS, as suggested in the PPG, were derived from the BCIS data. The cost figure for MSDC for 'Estate Housing – Generally' was £1,441 per sqm at that time (March 2022). The equivalent figure now (June 2026) has increased to £1,652 per sqm. This data suggests that the cost of construction has increased by about 14.6% since the 2022 LPVS was undertaken.

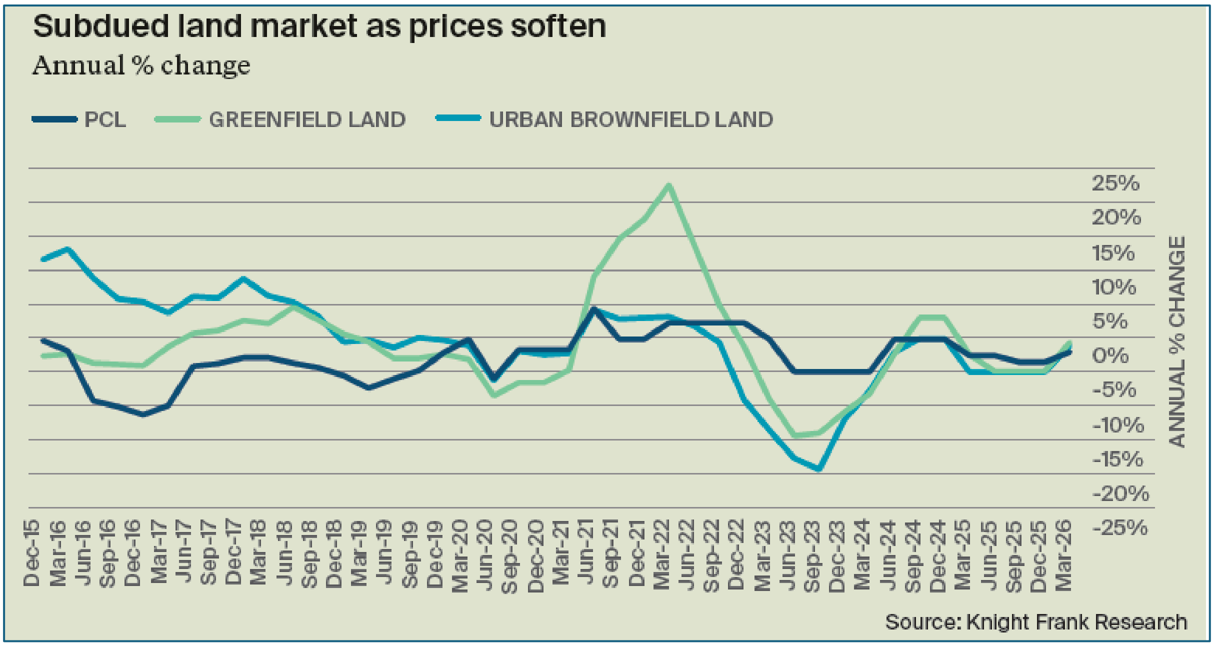
4.2 There has been much coverage in the press around build cost inflation. The BCIS is predicting that going forward, the General Build Cost Index will increase by about 2.1% over the next year (from June 2026 – 500.2 to June 2026 – 510.7) and by about 7.2% over the next three years. (from June 2026 – 500.2 to June 2029 – 536.0).

4.3 The final section of this Update Note includes a further set of appraisals based on the updated policy requirements, price and cost information. Sensitivity testing to changes in (BCIS based) build costs has been carried out.

5. Changes in Land Value

5.1 It is timely to review how the value of development land has changed over the last few years. There are several sources of relevant information. *Development Land Index* (Knight Frank Q1 2026 – being the most recently published) suggests that land prices may have fallen over the last few years.

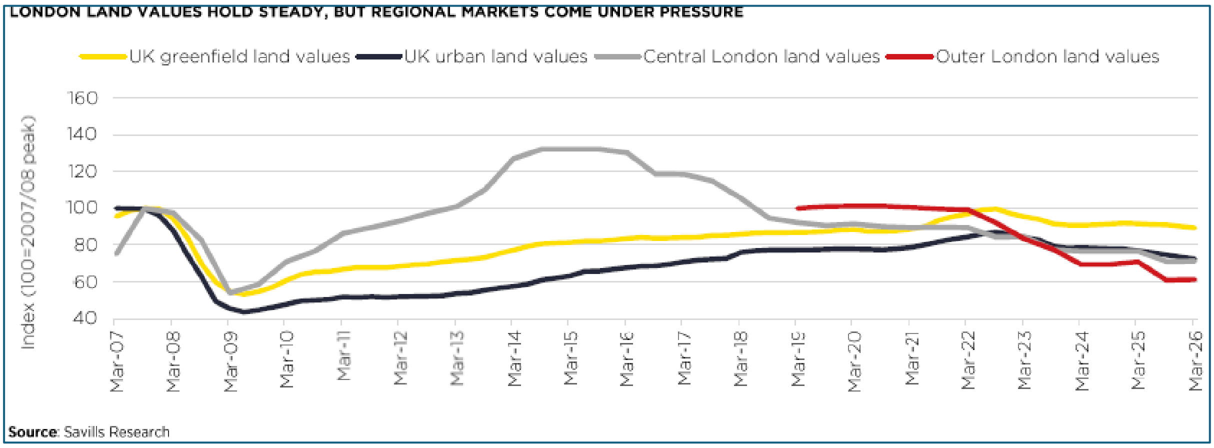
Knight Frank Development Land Index



Source: *Development Land Index (*Knight Frank Q1 2026)

5.2 A similar picture is given by Savills in its *Market in Minutes, Residential Development Land* (Savills Q1 2026).

Savills Indexed Residential Development Land Index (Index to 100 at 2007/2008 peak)



Source: Market in Minutes, Residential Development Land (Savills Q1 2026)

5.3 The above data suggests that the value of development land is broadly unchanged.

6. Changing Policy Requirements

6.1 The 2022 LPVS included a set of appraisals based on the recommended mix of policies (i.e. the combined planning obligations). The results were set out in Appendix 14 of that report. These were updated in the Regulation 19 Viability Note – September 2024, and were based on the following assumptions:

a.	Affordable Housing	30% (66.7% Affordable Rent, 25% First Homes, 8.3% Shared Ownership).
b.	Sustainability	Zero Carbon
		Water conservation – including rainwater harvesting – 85 Litres Per Person Per Day (LPPPD).
		10% Biodiversity Net Gain on typologies, 20% on Significant Sites.
c.	Design	5% of market housing to Part M4(3)a. 4% of affordable housing to Part M4(3)b and balance to Part M4(2).
d.	Developer Contributions	£12,000/unit (£25,000 per unit on the Significant Sites).

6.2 In August 2024 the Council updated the costs for strategic infrastructure and mitigation on the Significant Sites as follows:

Table 6.1 Significant Sites, Updated Costs of Strategic Infrastructure and Mitigation. £ per unit

		Units	Cost per dwelling
DPSC1	West of Burgess Hill and north of Hurstpierpoint	1,350	£22,700
DPSC2	Land at Crabbet Park (total)	2,000	£19,900
DPSC3	Land to the South of Reeds Lane, Sayers Common	2,000	£22,100

Source: MSDC (September 2024) N.B. based on September 2024 IDP.

6.3 Through the examination of the Local Plan a number of changes have emerged.

i. The construction standards concerning energy efficiency have been aligned with Building Regulations.

ii. The Water Efficiency Standards have been aligned with Building Regulations (110 LPPPD).

iii. The requirements for BNG have been aligned with national standards (ie a minimum of 10%), including in the case of the Significant Sites where 20% was sought.

iv. The housing mix has been aligned with the 2024 SHMA (this is as per the testing in 2024).

v. The affordable housing tenure mix has been updated to 75% Affordable Housing for Rent and the balance as Affordable Home ownership.

vi. The requirements for M4(2) Accessible Housing have been reduced to apply to 40% of homes.

vii. The requirements for water neutrality have been removed. Only a slither of the western area of the District lies within Southern Water's Sussex North Water Resource Zone (WRZ). The Council was not proposing allocations in this area which sits within an area of countryside, remote from any settlement boundary, so this was not considered in the earlier viability work (this is as per the testing in 2024).

viii. The Self and Custom Build policy has been refined, seeking 2% of units on sites of 100 dwellings and larger (capped at 5 plots for Significant Sites).

6.4 The cost implications of these are considered in below.

Zero Carbon v The Future Homes Standard

6.5 In the 2022 LPVS and 2024 Note, the construction costs were increased by 10% to reflect the Council's proposed move towards Zero Carbon development. The construction standards concerning energy efficiency have been aligned with Building Regulations.

6.6 As set out in Chapter 2 above, this is an area of changing national policy. It is national policy to achieve 'net zero' greenhouse gas emissions by 2050. The Department of Levelling up, Communities and Housing published revisions to Conservation of Fuel and Power, Approved Document L of the Building Regulations as a 'stepping stone' on the pathway to Zero Carbon homes. It sets the target of an interim 31% reduction in CO_2 emissions over 2013 standards for dwellings. The changes apply to new homes that submit plans after June 2022 or have not begun construction before June 2023 – so now applies to all new homes.

6.7 The costs of these higher standards depend on the specific changes made and are considered in Chapter 3 of the 2019 Government Consultation[22]. This suggests that the costs, having been indexed, would add about 1% to the current base cost of construction (these have been in place for some time, so are now largely, but not fully reflected within the up-to-date BCIS costs).

6.8 The Government announced in March 2026 that it will be implementing the Future Homes Standard and Future Building Standard through Building Regulations in 2027[23]. As this is likely to coincide with the adoption of the Local Plan it is prudent to assume the costs of meeting the Future Homes Standard apply.

[22] The Future Homes Standard 2019 Consultation on changes to Part L (conservation of fuel and power) and Part F (ventilation) of the Building Regulations for new dwellings (MHCLG, October 2019).

[23] FHBS_Circular.pdf

6.9 Paragraph 6.10 of The Future Homes Standard 2023 consultation on the energy efficiency requirements of the *Building Regulations affecting new and existing dwellings. Consultation-Stage Impact Assessment* sets out the following costs:

> *6.6 A summary of the impacts considered under this Impact assessment (IA) is provided below in Table 3, relative to the counterfactual – the counterfactual is the 2021 notional building specification, which has a gas boiler, lower efficiency solar panels and wastewater heat recovery, or a heat pump (see Routes to Compliance (para 5.23 - 5.25) section). This is with the exception of mid-high rise, which is an ASHP and gas boiler hybrid communal heat network. Broadly, Option 1 is a home with a heat pump and more efficient solar panels. Option 2 meets our public commitments through the use of heat pumps only. All figures are Net Present Values (NPV) over 10 years of policy and a subsequent 60-year life of the buildings. Negative NPVs are given in parenthesis and represent costs. The figures represent the aggregate impact across the building mix…*
>
> *6.10. … In 2022 prices, on a per-home basis (3-bed semi-detached), Option 1 leads to a ~£6,200 (4%) increase in upfront capital costs, whereas Option 2 only leads to a ~£1,000 (1%) increase….*
>
> *Additional Capital Costs*
>
> *6.16. The increase in capital costs from the proposed 2025 standards, compared with the continuation of existing 2021 standards (gas boiler and solar pv home), are shown in Table 5. Further breakdown of the costs of the different elements is provided in Appendix C.*
>
> *Table 5: Additional Capital Costs* relative to 2021 Gas Boiler and Solar PV Counterfactual (£)*

	Option 1	Option 2
Detached house	£6,390	£-200**
Semi-detached house	£6,170	£950
Mid-Terraced house	£5,960	£740
Low Rise Flats (<11m)	£4,460	£2,760
Mid Rise Flats (>11m) (same for both option)	£190	£190
Weighted Average (based on assumed build mix)	£4,360	£640
*Gross Undiscounted Costs in 2022 prices, excluding gas asset value cost in counterfactual. If included this would lead to the costs presented in table 5 falling. ** a minus equals a cost saving.		

> *6.17. Over the longer-term, Currie & Brown estimate that the costs associated with both heat pumps and solar PV will fall, as supply chains mature and become more integrated, and learning rates take effect. By the end of the policy appraisal period (10 years), it is assumed that the cost of a heat pump will be around 70% of the initial cost, whilst for Solar PV they will be around 60% of the initial cost.*

6.10 Separately, the *Future Homes Hub, Ready for Zero, Evidence to inform the 2025 Future Homes Standard – Task Group Report* (February 2023)[24] was published before the Government consultation, so is testing a wider set of options (CS1 to CS5) than are being considered at a national level. The following costs were estimated:

[24] Ready+for+Zero+-+Evidence+to+inform+the+2025+Future+Homes+Standard+-Task+Group+Report+FINAL-+280223-+MID+RES.pdf

Table 6.1 Additional Costs for Options Towards Zero Carbon

		Arcadis Cost uplift compared with Ref 2021	Arcadis Cost uplift compared with Ref 2025	Energy bills variance from Ref 2021 (£700/yr)*
CS1	to be consistent with the expectation that the FHS home should reduce carbon emissions by a minimum of 75% from 2013	2%	-3%	Circa 190/yr more
CS2	to align closely with the current Part L 2021 but electrify the heating	7%	2%	Circa £260/yr less
CS2a	As for CS2 but with batteries on PV and infra-red heating	10%	5%	Circa £50/yr less (Significant under-estimate)**
CS3	to be mainstream recognised low energy techniques and technologies for a very low energy specification, whilst allowing design flexibility	15%	9%	Circa £360/yr less
CS4	to minimise space and water heating, drawing on UK and European low energy building best practice	19%	13%	Circa £450/yr less
CS5	to improve the fabric efficiency to the level that a comfortable temperature is maintained without a heating system	17%	11%	Circa £410/yr less

Source: Future Homes Hub, Ready for Zero, Evidence to inform the 2025 Future Homes Standard – Task Group Report (February 2023)

6.11 These costs are somewhat greater than those in the more recent Government consultation, however they predate the Government announcement and are not directly comparable.

6.12 It is important to note that the above costs are the costs over the 2021 Part L, and not the costs over the current BCIS costs. As set out above, it would now be appropriate to assume the additional costs of the increase in standards, set out in 2021 Part L, add 1% to the current BCIS costs.

6.13 The Future Home Standard is expected to add 5% to the current BCIS base costs. This is assumed and is less than the 10% allowance used in the earlier work. The costs of providing an electric vehicle charging point is included in this cost.

Water Efficiency Standards

6.14 In the 2022 LPVS and the 2024 Note, the construction costs were increased (by £32 per sqm / about £3,000 per unit) to reflect the Council's proposed requirements for a water standard of 85 LPPPD. The Water Efficiency Standards have been aligned with Building Regulations (110 LPPPD).

6.15 The costs are modest, likely to be less than £10/dwelling[25]. This is assumed to apply.

Biodiversity Net Gain

6.16 In the 2022 LPVS and 2024 Note, the construction costs were increased to reflect the Council's proposed requirements for 10% Biodiversity Net Gain on the typologies and 20% on Significant Sites.

6.17 The requirements for BNG have been aligned with national standards (i.e. a minimum of 10%), including in the case of the Significant Sites where previously 20% was sought. In the earlier work, the cost of 20% BNG is assumed to cost 150% of the cost of achieving 10%. It is understood that the Council anticipates that BNG will be delivered on-site on the Significant Sites.

Housing Mix

6.18 In the 2022 LPVS the housing mix was tested on the following basis:

> *8.52 The policy previously specified a mix of affordable housing tenure comprising 25% intermediate homes / First Homes and 75% Social or Affordable Rented. This does not align with paragraph 65 of the 2021 NPPF (see Chapter 2 above), which seeks 10% of all homes to be Affordable Home Ownership and the policy has since been amended to align with the NPPF. With 30% affordable housing, the minimum NPPF compliant amount of Affordable Home Ownership is 1/3 of the affordable housing. This forms the base modelling.*
>
> *8.53 The following housing mix is sought.*

	1 bed / 2 person	2 bed / 4 person	3 bed / 5 person	4+bed / 6 person
Market housing	5-10%	20-25%	40-45%	25-30%
Affordable Ownership	10-15%	50-55%	25-30%	5-10%
Affordable Rented	30-35%	40-45%	15-20%	5-10%

> *8.54 It is important to note that that this is not applied rigidly across all sites, rather consideration is also given to the wider scheme and factors such as the situation are also material.*

6.19 The Council's mix was updated through the 2024 SHMA as follows – this is broadly similar:

[25] Paragraph 285 Housing Standards Review, Final Implementation Impact Assessment, March 2015. Department for Communities and Local Government.

Table 6.2 Suggested mix of housing by size and tenure

	Market Housing	Affordable Home Ownership	Affordable housing (rented)
1-bedroom	0-10%	10-15%	30-35%
2-bedrooms	20-25%	50-55%	40-45%
3-bedrooms	40-45%	25-30%	15-20%
4+-bedrooms	30-35%	5-10%	5-10%

Source: Table 5.5 Mid Sussex Strategic Housing Market Assessment Update (Iceni, October 2024)

6.20 The modelling has been aligned with this new mix, although as in the earlier modelling, this is not applied rigidly across all sites, rather consideration is also given to the wider scheme and factors such as the situation are also material.

Affordable Housing

6.21 In the 2022 LPVS and 2024 Note, the affordable housing was assumed to be delivered as 66.7% Affordable Rent, 25% First Homes, 8.3% Shared Ownership. As set out in Chapter 2 above, two of the requirements of earlier national policy have been dropped. Under Footnote 31 of the NPPF, the requirements for 25% for the affordable housing to be First Homes no longer applies. The requirement for 10% of all homes to be Affordable Home Ownership (as per paragraph 66 of the 2023 NPPF) no longer applies.

6.22 The Council has updated the affordable housing tenure mix so better to meet local need, to 75% Affordable Housing for Rent and the balance as Affordable Home ownership. For the purpose of this Update Note, a mix of 75% Affordable Rent, 25% Affordable Home Ownership (as shared ownership) is assumed.

Accessible Housing

6.23 In the 2022 LPVS and 2024 Note it was assumed that 5% of market housing would be to the Part M4(3)a (Wheelchair Adaptable) standard, 4% of affordable housing would be to the Part M4(3)b (Wheelchair Accessible) standard, and balance to Part M4(2) (Accessible and Adaptable) standard. The requirements for M4(2) have been reduced, to align with the December 2025 NPPF consultation, to apply to 40% of homes.

6.24 The costs in this regard have been updated. The additional costs of the further standards (as set out in the draft Approved Document M amendments included at Appendix B4[26]) are set out below. The key features of the 3 level standard (as summarised in the DCLG publication *Housing Standards Review – Final Implementation Impact Assessment* (DCLG, March 2015)[27], reflect accessibility as follows:

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[26] https://www.gov.uk/government/publications/access-to-and-use-of-buildings-approved-document-m

[27] https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/418414/150327_-_HSR_IA_Final_Web_Version.pdf

- Category 1 – Dwellings which provide reasonable accessibility.
- Category 2 – Dwellings which provide enhanced accessibility and adaptability (Part M4(2)).
- Category 3 – Dwellings which are accessible and adaptable for occupants who use a wheelchair (Part M4(3)).

6.25 The cost of a wheelchair accessible dwelling, based on the Wheelchair Housing Design Guide for a 3 bed house, is taken to be £25,136 per dwelling[28]. The cost of a wheelchair adaptable dwelling, based on the Wheelchair Housing Design Guide for a 3 bed house, is taken to be £10,111 per dwelling[29.] The cost of Category 2 is taken to be £521[30]. These costs have been indexed to £37,700/dwelling, £15,170 per dwelling and £780 per dwelling respectively.

Water Neutrality

6.26 The requirements for water neutrality have been removed. Only a slither of the western area of the District lies within Southern Water's Sussex North Water Resource Zone (WRZ). The Council was not proposing allocations in this area which sits within an area of countryside, remote from any settlement boundary, so this was not considered in the earlier viability work (this is as per the testing in 2024).

Self and Custom Build

6.27 The requirements for 5% of plots on sites of 100 dwellings and larger was tested. This policy has been refined, now seeking 2% of units on sites of 100 dwellings and larger (capped at 5 plots for Significant Sites). The impact of this is considered below.

Developer Contributions

6.28 The approach to developer contributions was set out at paragraph 8.108 of the 2022 LPVS:

> *A range of requirements are tested. A general figure to include the above, SAMM and SANG payments and other developer contributions of £12,000/ unit is used in the base appraisals. This is close to the average collected from recent schemes. The Council is currently updating the Infrastructure Delivery Plan (IDP), which will be used to better understand the need for developer contributions. As this is an area of uncertainty, a range of contributions of up to £30,000/unit is tested.*

6.29 In August 2024 the Council updated the costs for strategic infrastructure and mitigation on the Significant Sites as follows:

[28] Paragraph 152 Housing Standards Review – Final Implementation Impact Assessment (DCLG, March 2015).

[29] Paragraph 153 Housing Standards Review – Final Implementation Impact Assessment (DCLG, March 2015).

[30] Paragraph 157 Housing Standards Review – Final Implementation Impact Assessment (DCLG, March 2015).

Table 6.3 Significant Sites, Updated costs of Strategic Infrastructure and Mitigation. £ per unit

		Units	Cost per dwelling
DPSC1	West of Burgess Hill and north of Hurstpierpoint	1,350	£22,700
DPSC2	Land at Crabbet Park (total)	2,000	£19,900
DPSC3	Land to the South of Reeds Lane, Sayers Common	2,000	£22,100

Source: MSDC (September 2024) N.B. based on September 2024 IDP.

6.30 Whilst these are substantially above the allowance of £12,000 per units used in the 2022 Viability Study, they are within the £30,000 per unit range of sensitivity testing.

6.31 Having reviewed the updated IDP, the Council believes that it is prudent to assume a total costs of strategic infrastructure and mitigation is likely to be less than £35,000 per unit. This additional cost is tested below. Sensitivity testing is undertaken to reflect the uncertainty in this regard.

7. Significant Sites

7.1 At the time of the 2022 LPVS, four potential Significant Sites are modelled:

- **Crabbet Park**, Old Hollow, Near Crawley, for up to 2,300 units.
- **Land East of Ansty,** for about 1,600 units and 1,000 sqm of employment space.
- **Land to the West of Burgess Hill,** for about 1,400 units.
- **Land at Sayers Common,** for about 2,000 units[31], 2,000 sqm to 4,000 sqm of retail space and 9,000sqm of commercial space.

7.2 The residential elements of these sites were tested as follows in the 2024 Update Note and are retested now based on the updated unit numbers and site areas.

Table 7.1 Significant Sites – 2024

Crabbet Park	Units	2,300	Significant site. 1,950 dwellings all within Plan period. Mix as per policy. Policy compliant POS of 17.933 ha provided on-site. Whole site area of 150 ha but only 45% net developable - modelled assuming 60% net developable (127.778 ha).
	Gross	127.778	
	Net	76.667	
1	Density	30.0	
East of Ansty	Units	1,600	Significant site. Mix as per policy. Policy compliant POS of 12.457ha provided on-site. Whole site area of 212 ha but only 25% net developable - modelled assuming 60% net developable (88.889 ha).
	Gross	88.889	
	Net	53.333	
2	Density	30.0	
West of Burgess Hill and north of Hurstpierpoint	Units	1,400	Significant site. 1,350 dwellings all within Plan period. Mix as per policy. Policy compliant POS of 10.900 ha provided on-site. Whole site area of 57.8 ha. 71% net developable.
	Gross	66.000	
	Net	46.667	
3	Density	30.0	
South of Reeds Lane, Sayers Common	Units	2,000	Significant site. Mix as per policy. Policy compliant POS of 15.584 ha provided on-site. Whole site area of 90.34 ha. 75% net developable.
	Gross	88.500	
	Net	66.667	
4	Density	30.0	

Source: HDH 2026

7.3 These sites are re-tested on this basis, with the strategic infrastructure and mitigation costs set out towards the end of Chapter 6 above.

[31] As this report was being completed the likely capacity of this site was amended to 1,850 units. Whilst this will affect the results, the impact is unlikely to be material as the strategic infrastructure costs are calculated on a per unit basis.

8. Findings and Conclusions

8.1 HDH Planning & Development Ltd produced the *Mid Sussex District Council Local Plan Viability Study* (HDH, May 2022). The study was commissioned to support the development of the Local Plan. The report was undertaken in line with the requirements set out in the National Planning Policy Framework (NPPF) and National Planning Practice Guidance (PPG).

8.2 In December 2023 HDH produced a brief note to consider whether or not the 2022 Viability Study was up to date. A further September 2024 note was produced to replace the December 2023 note and further consider how the changes may impact on viability and whether it is necessary for the Council to fully update the viability evidence before submitting the Local Plan for examination.

8.3 This July 2026 Update Note has been produced, during the ongoing examination hearings, to answer the following question:

Is there scope to increase the affordable housing requirements in the submitted Local Plan, bearing in mind the changes in the wider policy standards and obligations that are suggested through the examination process?

8.4 This 2026 Update Note considers how the changes to the submitted Plan impact on viability. This is done in the wider context of changes in national policy, and changes in the main inputs to the Viability Assessment (costs and values).

8.5 The costs of construction have increased since the 2022 LPVS was undertaken, as has the value of newbuild housing. The Land Registry's latest data suggests that the average newbuild sale price has increased by about 21% over the last 4 years in the Council area. Analysis of the price paid data also suggests that the average price of newbuild houses, on a £ per sqm basis, is about 20% higher, although flats have increased by significantly less (6.8%). The analysis of newbuild asking prices suggests that whilst the average asking prices are about 24% higher, but when considered on a £ per sqm basis they are about 7% higher.

8.6 The BCIS suggests that build costs have increased by 14.6% since 2022, being less than the increase in values, suggesting, all other things being equal, that viability has improved a little since 2024.

8.7 House price forecasts and build costs forecasts suggest that, going forward, house prices are likely to increase at a broadly similar rate to that of build costs.

Updated Policy-on Appraisals

8.8 Paragraphs 10.43 to 10.45 of the 2022 LPVS considered the impact of changes in costs and values on the preferred set of policies, based on further appraisals that were summarised in Appendix 14 of that report. This analysis is now repeated. As set out in the preceding chapters above, there have been a number of changes to national policy and to the draft Local Plan since the 2022 LPVS was completed. The following adjustments are made in the fresh appraisals:

a. The value of market housing is increased as set out in Chapter 3 above.

b. The construction costs are increased to the latest (June 2026) BCIS costs.

c. The cost of meeting the Future Homes Standard, rather than a Zero Carbon standard is assumed, adding 5% to the costs of residential construction.

d. The water efficiency standard has been amended to 110 LPPPD.

e. Biodiversity is assumed as per the national standards (i.e. 10% including on Significant Sites).

f. The unit size mix is also updated to reflect the Council's updated Strategic Housing Market Assessment.

g. The affordable housing mix has been updated, in discussion with the Council, to 75% Affordable Rent and 25% Affordable Home Ownership (as Shared Ownership).

h. The requirement for 5% of market housing be to the Part M4(3)a (Wheelchair Adaptable) standard, and for 4% of affordable housing to be to the Part M4(3)b (Wheelchair Accessible) standard has been carried forward, however the requirements for M4(2) Accessible and Adaptable standard is reduced to 40%.

i. The base, all-inclusive s106 cost for strategic infrastructure and mitigation developer contributions assumption has been increased to £35,000 per unit. Sensitivity testing is carried out.

j. The common areas in flatted development have been increased to allow for second staircases.

k. The Building Safety Levy has been added at £20.12 per sqm for brownfield land and £40.23 per sqm for greenfield land and would apply to major development.

l. The updated national planning application fees are applied.

8.9 One further change is made. In the 2022 LPVS interest was assumed at 6%. In this update this has been increased to 7.5%, reflecting changes in the costs of borrowing.

8.10 The updated appraisals are run with varied levels of affordable housing and developer contributions, and the results are summarised in the tables below. The typologies and Significant Sites that can bear at least £35,000 in developer contributions are shaded green, and those that are unable to bear at least £35,000 in developer contributions are shaded red:

Table 8.1a Affordable Housing (%) v Developer Contributions – North including East Grinstead

	AFFORDABLE HOUSING	0%	10%	20%	30%	35%	40%	45%	50%
North									
Site 1	Green 350	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 2	Green 200	£50,000	£50,000	£50,000	£50,000	£50,000	£45,000	£40,000	£35,000
Site 3	Green 100	£50,000	£50,000	£50,000	£50,000	£50,000	£45,000	£45,000	£40,000
Site 4	Green 50	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£45,000
Site 5	Green 30	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 6	Green 20	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 7	Green 12	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 8	Green 9	£50,000							
Site 9	Green 9 DRA	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 10	Green 5	£50,000							
Site 11	Flats 100	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 12	Flats 40	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 13	Flats 20	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 14	Flats 10	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 15	Flats 6	Unviable							
Site 16	Brown 120	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 17	Brown 60	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 18	Brown 30	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 19	Brown 18	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 20	Brown 12	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 21	Brown 8	£25,000							
Site 22	Brown 4	£20,000							
Site 25	Crabett Park	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£40,000

Source: HDH (June 2026)

Table 8.1b Affordable Housing (%) v Developer Contributions – Central AONB

	AFFORDABLE HOUSING	0%	10%	20%	30%	35%	40%	45%	50%
Central AONB									
Site 4	Green 50	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 5	Green 30	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 6	Green 20	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 7	Green 12	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 8	Green 9	£50,000							
Site 9	Green 9 DRA	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 10	Green 5	£50,000							
Site 18	Brown 30	£10,000	£5,000	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 19	Brown 18	£15,000	£5,000	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 20	Brown 12	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 21	Brown 8	£40,000							
Site 22	Brown 4	£30,000							

Source: HDH (June 2026)

Table 8.1c Affordable Housing (%) v Developer Contributions – South, excluding Burgess Hill

AFFORDABLE HOUSING		0%	10%	20%	30%	35%	40%	45%	50%
South, excluding Burgess Hill									
Site 1	Green 350	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 2	Green 200	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£45,000	£40,000
Site 3	Green 100	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£45,000
Site 4	Green 50	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 5	Green 30	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 6	Green 20	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 7	Green 12	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 8	Green 9	£50,000							
Site 9	Green 9 DRA	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 10	Green 5	£50,000							
Site 11	Flats 100	£15,000	£10,000	£0	Unviable	Unviable	Unviable	Unviable	Unviable
Site 12	Flats 40	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 13	Flats 20	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 14	Flats 10	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 15	Flats 6	Unviable							
Site 16	Brown 120	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 17	Brown 60	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 18	Brown 30	£5,000	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 19	Brown 18	£5,000	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 20	Brown 12	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 21	Brown 8	£35,000							
Site 22	Brown 4	£25,000							
Site 26	East of Ansty	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000
Site 28	South of Reeds Lane	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000

Source: HDH (June 2026)

Table 8.1d Affordable Housing (%) v Developer Contributions – Burgess Hill and Adjacent

AFFORDABLE HOUSING		0%	10%	20%	30%	35%	40%	45%	50%
Burgess Hill and Adjacent									
Site 11	Flats 100	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 12	Flats 40	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 13	Flats 20	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 14	Flats 10	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 15	Flats 6	Unviable							
Site 16	Brown 120	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 17	Brown 60	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 18	Brown 30	£5,000	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 19	Brown 18	£5,000	£0	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 20	Brown 12	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable	Unviable
Site 21	Brown 8	£35,000							
Site 22	Brown 4	£25,000							
Site 27	West of Burgess Hill	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000	£50,000

Source: HDH (June 2026)

8.11 In response to the core question as to whether there is scope to increase the affordable housing requirements in the submitted Local Plan be increased, bearing in mind the reduction in wider policy standards and obligations that have been suggested through the examination process, the analysis suggests yes – there is scope to seek a greater level of affordable housing on the greenfield sites. The additional costs of the Building Safety Levy (£20.12 per sqm for brownfield land and £40.23 per sqm for greenfield land) and increasing the base assumption for strategic infrastructure and mitigation payments (from £12,000/unit on the typologies / £25,000 per unit on the Significant Sites to £35,000 per unit on all sites) is more than outweighed by the cost savings of building to the Future Homes Standard rather to a Zero Carbon Standard; the reduced water efficiency standard (110LPPPD rather than 90 LPPPD); BNG to the national standard on all sites (rather than 20% on the Significant Sites) and the reduction in the homes build to M4(2) Accessible and Adaptable standard to 40%.

8.12 This finding is consistent with the results reported in Chapter 10 of the 2022 LPVS where the impact on the Residual Value of the various policy options that were being considered by the Council were assessed.

8.13 In considering the results it is important to set them in a wider context of uncertainty in the wider economy. Further, Policy DP31 Affordable Housing in the adopted Local Plan seeks 30% affordable housing and this is normally delivered, so whilst the adopted Local plan does not seek zero carbon development, the expectation of 30% affordable housing will have been (or should have been) anticipated by developers when agreeing to buy land for development. In this regard the PPG says:

> *… It is the responsibility of site promoters to engage in plan making, take into account any costs including their own profit expectations and risks, and ensure that proposals for development are policy compliant. Policy compliant means development which fully complies with up to date plan policies. …*
>
> *PPG 10-006-20190509*

8.14 Bearing in mind the 2023 Written Parliamentary Statement which did does not preclude the introduction of policies that go beyond national standards, but did suggest that such policies will need to be well justified and subject to greater scrutiny, it was not certain that such policies would survive the Local Plan examination. This position was reinforced by the more recent December 2025 draft NPPF, which did not include a full zero carbon standard in the draft decision-making policies.

8.15 Some of the Significant Sites are moving towards planning applications, as soon as this summer or in the autumn, a cautious approach is suggested. Pre application discussions have been carried out, and the developers will have based the schemes of 30% affordable housing. A late change could complicate matters, as the housing mix and types are reconfigured.

8.16 It is timely to note that whilst the £35,000 per unit assumption used is a relatively high figure to apply across the typologies, it is important to note that Mid Sussex is not a CIL charging authority. If CIL was sought in this area, then the assumption would be less.

8.17 Whilst the above analysis does suggest that the greenfield sites across the District may be able to bear a greater affordable housing requirement, a cautious approach is suggested. To inform the Council's decision in this regard, a further set of appraisals has been run, based on 40% affordable housing and assuming a £35,000 per unit s106 contribution towards strategic infrastructure and mitigation. The results are also subject to sensitivity testing in terms of changes in costs and values. The results are summarised in **Appendix 4** below. These results are directly comparable with those included in Appendix 14 of the 2022 LPVS.

8.18 In the 2022 LPVS it was advised that the Council should be cautious in relying on brownfield sites in the housing trajectory, as the delivery of these is likely to continue to be challenging. This advice stands, it will be necessary to have regard to the progress of such sites through the development management process and / or commitments from site promoters.

Conclusion

8.19 Based on the analysis in this Update Note, there is scope to increase the affordable housing requirements in the submitted Local Plan. Having said this, it is necessary to consider viability evidence in the round, and have regard to the impact that a late change may have on the wider delivery of development.

8.20 In the 2022 LPVS, it was advised that the Council should be cautious in relying on brownfield sites in the housing trajectory, as the delivery of these is likely to continue to be challenging. It will be necessary to have regard to the progress of brownfield sites through the development management process and / or commitments from site promoters. This advice remains.

Appendix 1 – Newbuild Price Paid Data by Ward

2023 to 2026

Count	Flat	House	All
Ashurst Wood & East Grinstead South	24	51	75
Burgess Hill Dunstall	5	9	14
Burgess Hill Franklands		24	24
Burgess Hill Meeds & Hammonds	2		2
Burgess Hill St Andrews		97	97
Burgess Hill Victoria	3		3
Copthorne & Worth	4	194	198
Crawley Down		30	30
Cuckfield, Bolney & Ansty		22	22
Downland Villages		41	41
East Grinstead Ashplats		3	3
East Grinstead Imberhorne	29	26	55
East Grinstead Town	17	2	19
Handcross & Pease Pottage	24	120	144
Hassocks	14	85	99
Haywards Heath Ashenground	9	39	48
Haywards Heath Bentswood & Heath	57		57
Haywards Heath Franklands		5	5
Haywards Heath Lucastes & Bolnore	10		10
Hurstpierpoint	5		5
Lindfield Rural & High Weald	1	33	34
Total	**204**	**781**	**985**

Average £	Flat	House	All
Ashurst Wood & East Grinstead South	£259,956	£509,893	£429,913
Burgess Hill Dunstall	£358,400	£558,792	£487,223
Burgess Hill Franklands		£753,414	£753,414
Burgess Hill Meeds & Hammonds	£276,250		£276,250
Burgess Hill St Andrews		£463,387	£463,387
Burgess Hill Victoria	£277,333		£277,333
Copthorne & Worth	£323,749	£508,874	£505,134
Crawley Down		£574,000	£574,000
Cuckfield, Bolney & Ansty		£622,455	£622,455
Downland Villages		£559,701	£559,701
East Grinstead Ashplats		£465,000	£465,000
East Grinstead Imberhorne	£202,020	£595,026	£387,805
East Grinstead Town	£219,525	£605,000	£260,101
Handcross & Pease Pottage	£353,646	£714,771	£654,583
Hassocks	£309,080	£518,762	£489,110
Haywards Heath Ashenground	£281,523	£569,687	£515,657
Haywards Heath Bentswood & Heath	£233,473		£233,473
Haywards Heath Franklands		£618,000	£618,000
Haywards Heath Lucastes & Bolnore	£264,600		£264,600
Hurstpierpoint	£489,000		£489,000
Lindfield Rural & High Weald	£331,500	£683,682	£673,324
Total	**£266,567**	**£566,530**	**£504,406**

Average £ per sqm	Flat	House	All
Ashurst Wood & East Grinstead South	£4,353	£5,041	£4,821
Burgess Hill Dunstall	£5,234	£4,912	£5,027
Burgess Hill Franklands		£5,703	£5,703
Burgess Hill Meeds & Hammonds	£2,675		£2,675
Burgess Hill St Andrews		£4,777	£4,777
Burgess Hill Victoria	£3,657		£3,657
Copthorne & Worth	£4,502	£4,724	£4,720
Crawley Down		£4,801	£4,801
Cuckfield, Bolney & Ansty		£4,795	£4,795
Downland Villages		£4,916	£4,916
East Grinstead Ashplats		£4,389	£4,389
East Grinstead Imberhorne	£3,597	£5,108	£4,311
East Grinstead Town	£5,075	£4,324	£4,960
Handcross & Pease Pottage	£4,817	£5,052	£5,012
Hassocks	£4,381	£4,811	£4,749
Haywards Heath Ashenground	£5,129	£4,904	£4,947
Haywards Heath Bentswood & Heath	£5,182		£5,182
Haywards Heath Franklands		£4,448	£4,448
Haywards Heath Lucastes & Bolnore	£4,887		£4,887
Hurstpierpoint	£5,861		£5,861
Lindfield Rural & High Weald	£5,718	£5,770	£5,768
Total	**£4,684**	**£4,912**	**£4,864**

2023

Count	Flat	House	All
Ashurst Wood & East Grinstead South	22	46	68
Burgess Hill Franklands		4	4
Burgess Hill St Andrews		39	39
Burgess Hill Victoria	3		3
Copthorne & Worth	2	112	114
Crawley Down		12	12
Cuckfield, Bolney & Ansty		17	17
Downland Villages		30	30
East Grinstead Ashplats		3	3
East Grinstead Imberhorne	28	13	41
East Grinstead Town	2	2	4
Handcross & Pease Pottage	6	59	65
Hassocks	7	41	48
Haywards Heath Ashenground	8	33	41
Haywards Heath Bentswood & Heath	48		48
Haywards Heath Lucastes & Bolnore	2		2
Hurstpierpoint	2		2
Lindfield Rural & High Weald		20	20
Total	**130**	**431**	**561**

Average £	Flat	House	All
Ashurst Wood & East Grinstead South	£260,861	£493,414	£418,176
Burgess Hill Franklands		£1,350,000	£1,350,000
Burgess Hill St Andrews		£503,408	£503,408
Burgess Hill Victoria	£277,333		£277,333
Copthorne & Worth	£325,000	£531,001	£527,387
Crawley Down		£567,875	£567,875
Cuckfield, Bolney & Ansty		£589,647	£589,647
Downland Villages		£590,990	£590,990
East Grinstead Ashplats		£465,000	£465,000
East Grinstead Imberhorne	£198,521	£666,975	£347,055
East Grinstead Town	£214,000	£605,000	£409,500
Handcross & Pease Pottage	£382,500	£757,788	£723,146
Hassocks	£310,017	£551,279	£516,095
Haywards Heath Ashenground	£279,339	£550,147	£497,306
Haywards Heath Bentswood & Heath	£229,167		£229,167
Haywards Heath Lucastes & Bolnore	£275,500		£275,500
Hurstpierpoint	£527,500		£527,500
Lindfield Rural & High Weald		£723,003	£723,003
Total	**£250,103**	**£586,944**	**£508,888**

Average £ per sqm	Flat	House	All
Ashurst Wood & East Grinstead South	£4,406	£5,066	£4,853
Burgess Hill Franklands		£6,144	£6,144
Burgess Hill St Andrews		£4,586	£4,586
Burgess Hill Victoria	£3,657		£3,657
Copthorne & Worth	£4,520	£4,685	£4,682
Crawley Down		£5,142	£5,142
Cuckfield, Bolney & Ansty		£4,810	£4,810
Downland Villages		£4,966	£4,966
East Grinstead Ashplats		£4,389	£4,389
East Grinstead Imberhorne	£3,577	£5,315	£4,128
East Grinstead Town	£4,948	£4,324	£4,636
Handcross & Pease Pottage	£4,768	£4,992	£4,971
Hassocks	£4,394	£4,916	£4,840
Haywards Heath Ashenground	£5,168	£4,939	£4,985
Haywards Heath Bentswood & Heath	£5,204		£5,204
Haywards Heath Lucastes & Bolnore	£4,669		£4,669
Hurstpierpoint	£5,187		£5,187
Lindfield Rural & High Weald		£5,833	£5,833
Total	**£4,594**	**£4,909**	**£4,834**

2024

Count	Flat	House	All
Ashurst Wood & East Grinstead South	2	5	7
Burgess Hill Dunstall	4	6	10
Burgess Hill Franklands		8	8
Burgess Hill Meeds & Hammonds	2		2
Burgess Hill St Andrews		47	47
Copthorne & Worth	2	76	78
Crawley Down		18	18
Cuckfield, Bolney & Ansty		5	5
Downland Villages		11	11
East Grinstead Imberhorne	1	11	12
East Grinstead Town	1		1
Handcross & Pease Pottage	13	37	50
Hassocks	7	39	46
Haywards Heath Ashenground	1	6	7
Haywards Heath Bentswood & Heath	9		9
Haywards Heath Franklands		3	3
Haywards Heath Lucastes & Bolnore	8		8
Hurstpierpoint	2		2
Lindfield Rural & High Weald	1	8	9
Total	**53**	**280**	**333**

Average £	Flat	House	All
Ashurst Wood & East Grinstead South	£250,000	£661,500	£543,929
Burgess Hill Dunstall	£356,750	£575,000	£487,700
Burgess Hill Franklands		£751,868	£751,868
Burgess Hill Meeds & Hammonds	£276,250		£276,250
Burgess Hill St Andrews		£432,899	£432,899
Copthorne & Worth	£322,498	£483,305	£479,182
Crawley Down		£578,083	£578,083
Cuckfield, Bolney & Ansty		£734,000	£734,000
Downland Villages		£474,368	£474,368
East Grinstead Imberhorne	£300,000	£523,636	£505,000
East Grinstead Town	£195,000		£195,000
Handcross & Pease Pottage	£373,654	£726,432	£634,710
Hassocks	£308,142	£471,521	£446,659
Haywards Heath Ashenground	£298,995	£677,162	£623,138
Haywards Heath Bentswood & Heath	£256,439		£256,439
Haywards Heath Franklands		£401,667	£401,667
Haywards Heath Lucastes & Bolnore	£261,875		£261,875
Hurstpierpoint	£515,000		£515,000
Lindfield Rural & High Weald	£331,500	£665,188	£628,111
Total	**£315,046**	**£538,429**	**£502,876**

Average £ per sqm	Flat	House	All
Ashurst Wood & East Grinstead South	£3,765	£4,808	£4,510
Burgess Hill Dunstall	£5,238	£5,293	£5,271
Burgess Hill Franklands		£5,768	£5,768
Burgess Hill Meeds & Hammonds	£2,675		£2,675
Burgess Hill St Andrews		£4,938	£4,938
Copthorne & Worth	£4,483	£4,760	£4,753
Crawley Down		£4,574	£4,574
Cuckfield, Bolney & Ansty		£4,744	£4,744
Downland Villages		£4,784	£4,784
East Grinstead Imberhorne	£4,167	£4,860	£4,802
East Grinstead Town	£5,009		£5,009
Handcross & Pease Pottage	£4,807	£4,956	£4,918
Hassocks	£4,368	£4,637	£4,595
Haywards Heath Ashenground	£4,825	£4,715	£4,731
Haywards Heath Bentswood & Heath	£5,068		£5,068
Haywards Heath Franklands		£3,842	£3,842
Haywards Heath Lucastes & Bolnore	£4,941		£4,941
Hurstpierpoint	£7,097		£7,097
Lindfield Rural & High Weald	£5,718	£5,960	£5,925
Total	**£4,810**	**£4,851**	**£4,844**

2025

Count	Flat	House	All
Burgess Hill Dunstall	1	3	4
Burgess Hill Franklands		12	12
Burgess Hill St Andrews		11	11
Copthorne & Worth		6	6
East Grinstead Imberhorne		2	2
East Grinstead Town	14		14
Handcross & Pease Pottage	5	24	29
Hassocks		5	5
Haywards Heath Franklands		2	2
Hurstpierpoint	1		1
Lindfield Rural & High Weald		4	4
Total	**21**	**69**	**90**

Average £	Flat	House	All
Burgess Hill Dunstall	£365,000	£526,375	£486,031
Burgess Hill Franklands		£555,583	£555,583
Burgess Hill St Andrews		£451,764	£451,764
Copthorne & Worth		£419,714	£419,714
East Grinstead Imberhorne		£520,000	£520,000
East Grinstead Town	£222,066		£222,066
Handcross & Pease Pottage	£266,999	£591,041	£535,171
Hassocks		£620,600	£620,600
Haywards Heath Franklands		£942,500	£942,500
Hurstpierpoint	£360,000		£360,000
Lindfield Rural & High Weald		£516,238	£516,238
Total	**£246,139**	**£550,895**	**£479,785**

Average £ per sqm	Flat	House	All
Burgess Hill Dunstall	£5,218	£4,149	£4,416
Burgess Hill Franklands		£5,513	£5,513
Burgess Hill St Andrews		£4,777	£4,777
Copthorne & Worth		£4,993	£4,993
East Grinstead Imberhorne		£5,122	£5,122
East Grinstead Town	£5,115		£5,115
Handcross & Pease Pottage	£4,899	£5,357	£5,276
Hassocks		£5,237	£5,237
Haywards Heath Franklands		£5,356	£5,356
Hurstpierpoint	£4,737		£4,737
Lindfield Rural & High Weald		£5,290	£5,290
Total	**£5,025**	**£5,182**	**£5,153**

2026

Count	Flat	House	All
Lindfield Rural & High Weald		1	1
Total		**1**	**1**

Average £	Flat	House	All
Lindfield Rural & High Weald		£715,000	£715,000
Total		**£715,000**	**£715,000**

Average £ per sqm	Flat	House	All
Lindfield Rural & High Weald		£4,768	£4,768
Total		**£4,768**	**£4,768**

Appendix 2 – Newbuild Asking Prices, June 2026

Agent/Developer	Scheme Name	Address	Postcode	Name	Bedrooms	Type	sqm	£	£ per sqm
Charles Church	The Croft	Burgess Hill	RH15 0UU	Ashworth	3	S	77	£435,000	£5,649
Charles Church	The Croft	Burgess Hill	RH15 0UU	Whitehall485000	3	D	90	£485,000	£5,389
Charles Church	The Croft	Burgess Hill	RH15 0UU	Earlswood	4	D	115	£495,000	£4,304
Charles Church	Templegate	Burgess Hill	RH15 0XT	Barnwood	3	D	91	£520,000	£5,714
Charles Church	Templegate	Burgess Hill	RH15 0XT	Danbury	2	S	75	£430,000	£5,733
Charles Church	Templegate	Burgess Hill	RH15 0XT	Galloway	3	S	84	£470,000	£5,595
Charles Church	Templegate	Burgess Hill	RH15 0XT	Galloway	3	S	84	£470,000	£5,595
Charles Church	Templegate	Burgess Hill	RH15 0XT	Sherwood	3	D	89	£520,000	£5,843
Charles Church	Templegate	Burgess Hill	RH15 0XT	Barnwood	3	D	91	£540,000	£5,934
Charles Church	Templegate	Burgess Hill	RH15 0XT	Charnwood	3	D	91	£545,000	£5,989
Charles Church	Templegate	Burgess Hill	RH15 0XT	Marston	4	D	128	£630,000	£4,922
Barratt	Kingfisher park	Felbridge	RH19 2NY						
Bellway	Fallow Wood View	Burgess Hill	RH15 8RA	Reedmaker	4	D	115	£595,000	£5,174
Bellway	Fallow Wood View	Burgess Hill	RH15 8RA	Reedmaker	4	D	115	£630,000	£5,478
Bellway	Fallow Wood View	Burgess Hill	RH15 8RA	Reedmaker	4	D	115	£635,000	£5,522
Bellway	Fallow Wood View	Burgess Hill	RH15 8RA	Pronghorn	1	F	50	£250,000	£5,000
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Eynsford	3	S	90	£450,000	£5,000
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Eynsford	3	S	90	£465,000	£5,167
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Eynsford	3	S	90	£475,000	£5,278
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Aynesdale	3	D	98	£500,000	£5,102
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Plumdale	4	D	116	£595,000	£5,129
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Ransford	4	D	153	£750,000	£4,902
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Ransford	4	D	153	£770,000	£5,033
Taylor Wimpey	Ockley Park	Hassocks	BN6 8NX	Waysford	5	D	171	£860,000	£5,029
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Clayton	2	D	84	£455,000	£5,417
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Wood	4	D	138	£749,000	£5,428
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Wood	4	D	138	£740,000	£5,362
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Wood	4	D	138	£740,000	£5,362
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Pearce	4	D	167	£875,000	£5,240
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Albion	4	D	145	£820,000	£5,655
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Beacon	4	D	180	£925,000	£5,139
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Jill	3	D	121	£645,000	£5,331
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Jill	3	D	121	£590,000	£4,876
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Plomer	4	D	115	£630,000	£5,478
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Ockendon	3	D	114	£570,000	£5,000
Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Featherstone	3	D	110	£563,000	£5,118

Taylor Wimpey	Friars Oak	Hassocks	BN6 9NA	Salvat	3	D	99	£560,000	£5,657
Places for People	Abbeville Park	Burgess Hill	RH15 8BF	Holt	2	S	81	£442,500	£5,463
Places for People	Abbeville Park	Burgess Hill	RH15 8BF	Holt	2	S	81	£442,500	£5,463
Connells	Kilnwood Court	Burgess Hill	RH15 0WJ		2	F	85	£315,000	£3,706
Connells	Kilnwood Court	Burgess Hill	RH15 0WJ		2	F	85	£315,000	£3,706
Connells	Sussex House	East Grinstead	RH19		2	F		£320,000	
Elivia Homes	Woodlands	Sayers Common	BN6	plot 22	3	D	96	£525,000	£5,469
Elivia Homes	Woodlands	Sayers Common	BN6	plot 23	3	D	96	£525,000	£5,469
Elivia Homes	Woodlands	Sayers Common	Bn6	plot 21	3	D	96	£525,000	£5,469
Elivia Homes	Woodlands	Sayers Common	BN6	plot 28	3	D	104	£585,000	£5,625
Elivia Homes	Woodlands	Sayers Common	BN6	plot 26	4	D	130	£695,000	£5,346
Elivia Homes	Woodlands	Sayers Common	BN6	plot 24	4	D	150	£750,000	£5,000
Elivia Homes	Woodlands	Sayers Common	BN6	plot 25	4	D	150	£750,000	£5,000
Elivia Homes	Woodlands	Sayers Common	BN6	plot 36	4	D	150	£775,000	£5,167
Riverdale Developments	Martlet View	Burgess Hill	RH15 0DX	Greenfinch	5	D	240	£1,100,000	£4,583
Riverdale	Martlet View	Burgess Hill	RH15 0DX	Goldfinch	5	D	235	£1,100,000	£4,681
Riverdale	Martlet View	Burgess Hill	RH15 0DX	Starling	4	D	222	£1,000,000	£4,505
Riverdale	Martlet View	Burgess Hill	RH15 0DX	Wren	4	D	157	£825,000	£5,255
Riverdale	Martlet View	Burgess Hill	RH15 0DX	Wren	4	D	157	£825,000	£5,255
Denton Homes	Birdcage Lane	Hassocks	BN6 9HH				216	£1,000,000	£4,630
Cubitt and West		Crawley Down	RH10	Cantilever House	3	D		£950,000	
JW Stratton	Wheelwrights Place	Crawley Down	RH10 4HQ	plot 4	5	D	197	£925,000	£4,695
JW Stratton	Wheelwrights Place	Crawley Down	RH10 4HQ	plot 5	4	S	185	£875,000	£4,730
JW Stratton	Wheelwrights Place	Crawley Down	RH10 4HQ	plot 1	3	S	104	£575,000	£5,529
JW Stratton	Wheelwrights Place	Crawley Down	RH10 4HQ	plot 2	3	S	104	£575,000	£5,529
Jackson Stops	The Buxshalls	Lindfield	RH16	The Orchard	5	T	194	£750,000	£3,866
Jackson Stops	The Buxshalls	Lindfield	RH16	Jolland Lodge	2	D	98	£595,000	£6,071
Jackson Stops	The Buxshalls	Lindfield	RH16	Coach House	3	T	140	£595,000	£4,250
Jackson Stops	The Buxshalls	Lindfield	RH16	Coach House	3	T	140	£585,000	£4,179
Jackson Stops	The Buxshalls	Lindfield	RH16	the Courtyard	3	T	132	£560,000	£4,242
Jackson Stops	The Buxshalls	Lindfield	RH16	the Courtyard	3	T	132	£550,000	£4,167
Jackson Stops	The Buxshalls	Lindfield	RH16	the Courtyard	2	T	68	£395,000	£5,809
Sigma Homes	Hanlye View	Cuckfield	RH17 5SQ		3	S	118	£599,950	£5,084
Sigma Homes	Hanlye View	Cuckfield	RH17 5SQ		4	S	144	£699,950	£4,861
Shanly Homes	Rectory Gardens	Balcombe	RH17 6PA	home 6	3	S	119	£725,000	£6,092
Shanly Homes	Rectory Gardens	Balcombe	RH17 6PA	home 9	3	S	122	£690,000	£5,656
Bovis	Walstead Park	Lindfield	RH16 2QG	Clover	5	D	160	£795,000	£4,969
Bovis	Walstead Park	Lindfield	RH16 2QG	Watermill	3	D	101	£570,000	£5,644
Bovis	Walstead Park	Lindfield	RH16 2QG	Hayward	3	D	101	£580,000	£5,743
Bovis	Walstead Park	Lindfield	RH16 2QG	Clover	5	D	160	£795,000	£4,969
Bovis	Walstead Park	Lindfield	RH16 2QG	Pontin	4	D	141	£760,000	£5,390

Bovis	Walstead Park	Lindfield	RH16 2QG	Primrose	4	D	153	£775,000	£5,065
Thakeham	Templegate	Burgess Hill	RH15 0XT	Hickstead	3	S	104	£530,000	£5,096
Thakeham	Templegate	Burgess Hill	RH15 0XT	Sidlesham	2	S	73	£435,000	£5,959
Thakeham	Templegate	Burgess Hill	RH15 0XT	Linchmere	3	S	104	£530,000	£5,096
Thakeham	Templegate	Burgess Hill	RH15 0XT	Petworth	3	S	94	£495,000	£5,266
Thakeham	Templegate	Burgess Hill	RH15 0XT	Shottermill	4	D	130	£750,000	£5,769
Thakeham	Templegate	Burgess Hill	RH15 0XT	Wilmingtin	4	S	128	£675,000	£5,273
Brookworth Homes	Fairways	Burgess Hill	RH15		3	D	111	£650,000	£5,856
Antler Homes	Heatherlands	South Chailey	BN8 4FN	Sundew	3	S	96	£450,000	£4,688
Sigma Homes	Spring Bank	Haywards Heath	RH16 4LF	7	3	D	109	£500,000	£4,587
Sigma Homes	Spring Bank	Haywards Heath	RH16 4LF	8	3	D	102	£500,000	£4,902
Sigma Homes	Spring Bank	Haywards Heath	RH16 4LF	13	3	D	120	£552,500	£4,604
Sigma Homes	Spring Bank	Haywards Heath	RH16 4LF	15	3	D	120	£550,000	£4,583
Sigma Homes	Spring Bank	Haywards Heath	RH16 4LF	16	3	D	120	£550,000	£4,583
Sigma Homes	Spring Bank	Haywards Heath	RH16 4LF	17	3	D	120	£550,000	£4,583
Elivia Homes	Latham Grove	Ashington	RH20 3AS						
JW Stratton	Tawny Gardens	Angmering	BN16						
Countryside	Oakhurst at Brookleigh	Burgess Hill	RH15 8RW	Adur	4	S	115	£475,000	£4,130
Countryside	Oakhurst at Brookleigh	Burgess Hill	RH15 8RW	Adur	4	S	115	£485,000	£4,217
Countryside	Oakhurst at Brookleigh	Burgess Hill	RH15 8RW	Fairbridge	4	D	130	£600,000	£4,615
Countryside	Oakhurst at Brookleigh	Burgess Hill	RH15 8RW	Fairbridge	4	D	130	£600,000	£4,615
Cala	The Oaks		RH17 7RF	Fir	3	D	101	£525,000	£5,198
Cala	The Oaks		RH17 7RF	Burdock	2	D	97	£480,000	£4,948
Cala	The Oaks		RH17 7RF	Rowan	4	D	151	£760,000	£5,033
Cala	The Oaks		RH17 7RF	Poplar	4	D	144	£730,000	£5,069
Cala	The Oaks		RH17 7RF	Dandelion	3	D	107	£600,000	£5,607
Cala	The Oaks		RH17 7RF	Poplar	4	D	144	£760,000	£5,278
Kauto Homes	Foxes Mews	Haywards Heath	RH16		3	S	96	£475,000	£4,948
Connells	Oakhurst	East Grinstead	RH19		2	F	75	£430,000	£5,733
Connells	Oakhurst	East Grinstead	RH19		2	F	70	£375,000	£5,357
Whitehall Homes	Abbotsford Place	Burgess Hill	RH15		4	S	113	£425,000	£3,761
Whitehall Homes	Abbotsford Place	Burgess Hill	RH15		4	D	120	£450,000	£3,750
Connells	Sussex House	East Grinstead	RH19		3	F		£390,000	
Connells	Sussex House	East Grinstead	RH19		2	F	66	£320,000	£4,848
Connells	Sussex House	East Grinstead	RH19		1	F	54	£270,000	£5,000
Henry Adams	Church Corner House	Haywards Heath	RH16		1	F		£220,000	
Henry Adams	Church Corner House	Haywards Heath	RH16		2	F		£275,000	
G&H	Whittaker House	East Grinstead	RH19		2	F	54	£275,000	£5,093
Hunters		Burgess Hill	RH15 9TR		2	F	86	£295,000	£3,430
Connells	Kilnwood COurt	Burgess Hill	RH15		2	F	85	£315,000	£3,706
Connells	Kilnwood COurt	Burgess Hill	RH15		2	F	79	£315,000	£3,987

Appendix 3 – Derivation of Affordable Housing Value Assumptions – April 2026

Social Rent

General needs (social rent) Average weekly rent (£ per week) and unit counts by unit size for Mid Sussex - large PRPs					
	£ per week				
Unit Size	**Net rent**	**Formula rent**	**Service charge^**	**Gross rent^**	**Unit count**
Non-self-contained					
Bedsit	£94.42	£93.39	£31.98	£126.40	17
1 Bedroom	£116.34	£117.01	£10.45	£126.39	1,140
2 Bedroom	£138.85	£139.06	£7.09	£144.51	1,394
3 Bedroom	£161.55	£161.84	£2.98	£163.27	1,483
4 Bedroom	£180.22	£182.56	£4.63	£183.80	110
5 Bedroom	£170.95	£170.12	£0.38	£171.33	1
6+ Bedroom					
All self-contained	£141.70	£142.14	£7.20	£147.21	4,145
All stock sizes	**£141.70**	**£142.14**	**£7.20**	**£147.21**	**4,145**
Owned stock. Large PRPs only - unweighted. Excludes Affordable Rent and intermediate rent, but includes other units with an exception under the Rent Policy Statement. Stock outside England is excluded. Source: SDR 2025					

Source: Table 9, SDR 2025 – Data Tool[32]

Affordable Rent

Affordable Rent general needs Average weekly gross rent (£ per week) and unit counts by unit size for Mid Sussex		
	£ per week	
Unit Size	**Gross rent**	**Unit count**
Non-self-contained	-	-
Bedsit	£130.87	2
1 Bedroom	£174.27	711
2 Bedroom	£226.12	1,295
3 Bedroom	£252.68	497
4 Bedroom	£307.24	43
5 Bedroom	-	-
6+ Bedroom	-	-
All self-contained	£218.13	2,548
All stock sizes	**£218.13**	**2,548**
Owned stock. All PRPs owning Affordable Rent units - unweighted. Stock outside England is excluded. Source: SDR 2025		

Source: Table 1, SDR 2025 – Data Tool[33]

[32] Private registered provider social housing stock and rents in England 2024 to 2025 - GOV.UK

[33] Private registered provider social housing stock and rents in England 2024 to 2025 - GOV.UK

BRMA LHA Caps - £ per week

	Brighton and Hove BRMA	Crawley & Reigate BRMA
Shared Accommodation	£135.00	£109.62
One Bedroom	£211.73	£197.92
Two Bedrooms	£276.16	£253.15
Three Bedrooms	£333.70	£314.14
Four Bedrooms	£460.27	£402.74

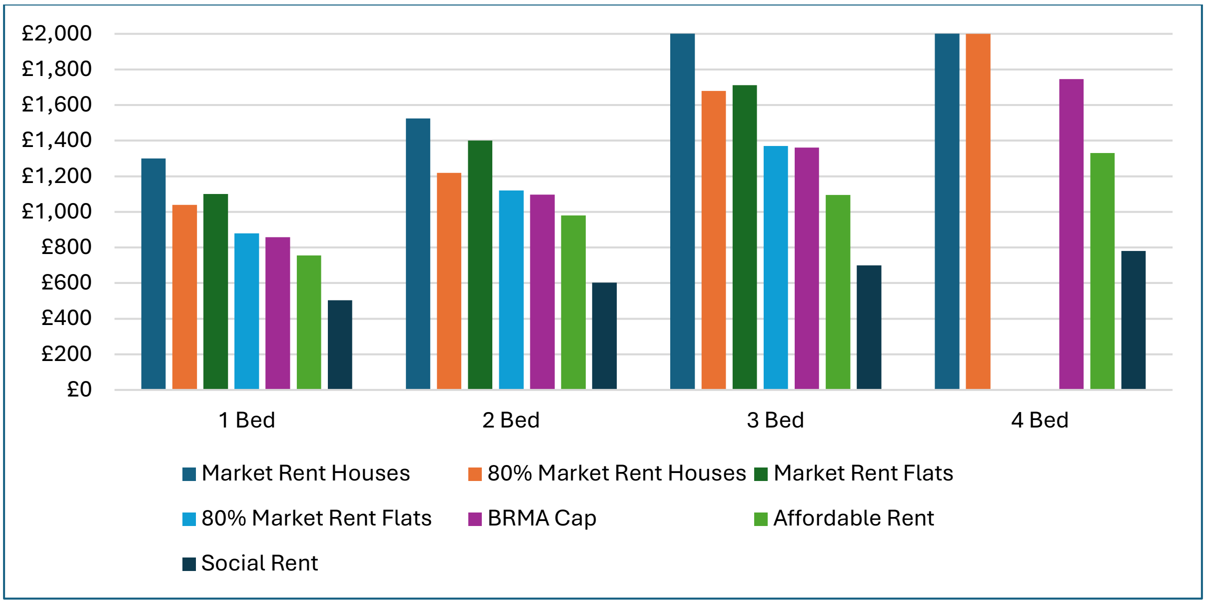
Source: VOA (June 2026)

Average Rents – Mid Sussex, April 2026 - £ per month

1 Bed	£1,000
2 Bed	£1,280
3 Bed	£1,605
4 Bed	£2,196
Detached	£2,027
Semidetached	£1,590
Terraced	£1,399
Flat maisonette	£1,133

Source: ONS (June 2026) [Price Index of Private Rents, UK: monthly price statistics - Office for National Statistics]

Rents by Tenure – £/Month



Source: Market Survey, SDR and VOA June 2026)

Capitalisation of Social Rents

	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
Rent (£/month)	£504	£602	£700	£781
Rent (£/annum)	£6,050	£7,220	£8,401	£9,371
Net Rent	£4,840	£5,776	£6,720	£7,497
Value	£107,550	£128,359	£149,344	£166,603
sqm	50	70	84	97
£ per sqm	£2,151	£1,834	£1,778	£1,718

Source: HDH (June 2026)

Capitalisation of Affordable Rents

	1 Bedroom	2 Bedrooms	3 Bedrooms	4 Bedrooms
Gross Rent (£/week)	£198	£253	£314	£403
Less Service Charges	£187	£242	£303	£392
Gross Rent (£/annum)	£9,720	£12,592	£15,763	£20,370
Net Rent (£/annum)	£7,776	£10,073	£12,611	£16,296
Value	£172,797	£223,854	£280,236	£362,142
sqm	50	70	84	97
£ per sqm	£3,456	£3,198	£3,336	£3,733

Source: HDH (June 2026)

Appendix 4 – Sensitivity Testing Based on Updated Policy Requirements and 40% Affordable Housing

North, including East Grinstead

		EUV	BLV	**Residual Value** (£ per gross ha)														
			Value Change	-10%	-5%	0%	+5%	+10%	+15%	+20%								
			BCIS Change									-10%	-5%	0%	+5%	+10%	+15%	+20%
Site 1	Green 350	25,000	525,000	874,576	1,059,207	1,243,838	1,428,469	1,613,101	1,797,732	1,982,110		1,523,962	1,383,900	1,243,838	1,103,776	963,714	823,652	680,121
Site 2	Green 200	25,000	525,000	348,195	542,331	736,466	930,602	1,124,738	1,318,874	1,513,009		1,085,213	910,840	736,466	562,093	387,719	213,346	38,973
Site 3	Green 100	25,000	525,000	359,033	569,512	779,991	990,470	1,200,949	1,411,428	1,621,907		1,157,520	968,756	779,991	591,226	402,461	213,696	23,987
Site 4	Green 50	25,000	525,000	450,516	704,284	958,052	1,211,819	1,465,587	1,719,355	1,973,122		1,414,742	1,186,397	958,052	729,707	501,362	273,017	41,862
Site 5	Green 30	25,000	525,000	606,927	854,969	1,103,012	1,351,055	1,599,097	1,847,140	2,095,183		1,531,182	1,317,097	1,103,012	888,927	674,842	460,757	246,672
Site 6	Green 20	25,000	525,000	684,259	933,603	1,182,947	1,432,291	1,681,635	1,930,979	2,180,323		1,613,846	1,398,397	1,182,947	967,497	752,047	536,598	321,148
Site 7	Green 12	50,000	550,000	560,102	775,728	991,354	1,206,980	1,422,606	1,638,233	1,853,859		1,354,660	1,173,007	991,354	809,701	628,048	446,395	259,649
Site 8	Green 9	50,000	550,000	951,376	1,296,501	1,641,627	1,986,753	2,331,878	2,677,004	3,022,130		2,303,637	1,972,632	1,641,627	1,310,622	979,617	643,257	298,769
Site 9	Green 9 DRA	50,000	550,000	919,683	1,273,908	1,628,132	1,982,357	2,336,581	2,690,805	3,045,030		2,238,941	1,933,537	1,628,132	1,322,728	1,017,323	708,399	392,056
Site 10	Green 5	50,000	550,000	759,174	1,152,907	1,542,681	1,922,678	2,302,674	2,682,671	3,062,668		2,305,922	1,924,301	1,542,681	1,151,236	755,767	355,348	-45,072
Site 11	Flats 100	2,500,000	3,000,000	-2,185,497	-1,634,272	-1,083,048	-532,062	-942	512,189	1,018,375		188,628	-436,252	-1,083,048	-1,732,758	-2,382,469	-3,039,980	-3,699,949
Site 12	Flats 40	2,500,000	3,000,000	-1,366,099	-1,027,322	-688,546	-349,769	-22,827	299,726	610,822		96,618	-289,526	-688,546	-1,088,729	-1,488,913	-1,889,097	-2,289,281
Site 13	Flats 20	2,500,000	3,000,000	-1,187,507	-888,645	-589,783	-291,026	-3,063	284,748	564,177		97,230	-240,879	-589,783	-940,186	-1,290,589	-1,640,992	-1,991,395
Site 14	Flats 10	2,500,000	3,000,000	-1,191,961	-891,986	-592,010	-292,034	-2,944	286,091	574,761		86,645	-247,185	-592,010	-937,978	-1,283,946	-1,629,914	-1,975,882
Site 15	Flats 6	2,500,000	3,000,000	-1,472,257	-1,106,154	-740,052	-374,145	-21,394	331,356	684,107		151,266	-287,815	-740,052	-1,195,098	-1,650,144	-2,105,190	-2,560,236
Site 16	Brown 120	2,500,000	3,000,000	560,814	844,212	1,127,611	1,411,009	1,694,408	1,977,806	2,261,205		1,630,705	1,379,158	1,127,611	876,064	624,517	372,971	121,424
Site 17	Brown 60	2,500,000	3,000,000	568,843	864,009	1,159,175	1,454,342	1,749,508	2,044,674	2,339,841		1,687,918	1,423,547	1,159,175	894,804	630,433	366,062	100,958
Site 18	Brown 30	2,500,000	3,000,000	591,884	896,056	1,200,227	1,504,399	1,808,570	2,112,741	2,416,913		1,737,372	1,468,799	1,200,227	931,655	663,083	394,511	121,606
Site 19	Brown 18	2,500,000	3,000,000	641,524	941,090	1,240,656	1,540,222	1,839,789	2,139,355	2,438,921		1,770,932	1,505,794	1,240,656	975,518	710,380	445,242	171,191
Site 20	Brown 12	2,500,000	3,000,000	477,722	667,665	857,608	1,047,550	1,237,493	1,427,435	1,617,378		1,190,223	1,023,915	857,608	691,300	524,992	356,422	183,782
Site 21	Brown 8	2,500,000	3,000,000	1,207,630	1,582,479	1,956,135	2,329,791	2,703,447	3,077,103	3,450,759		2,641,512	2,298,824	1,956,135	1,613,446	1,270,758	918,738	562,493
Site 22	Brown 4	2,500,000	3,000,000	993,222	1,352,002	1,706,708	2,058,555	2,410,402	2,754,861	3,096,796		2,352,082	2,029,395	1,706,708	1,381,736	1,052,691	723,646	394,601
Site 25	Crabbet Park	25,000	525,000	476,159	590,031	703,904	816,570	929,137	1,041,705	1,154,273		879,658	791,830	703,904	614,629	525,353	434,976	343,896

Central – AONB

		EUV	BLV	**Residual Value** (£ per gross ha)														
			Value Change	-10%	-5%	0%	+5%	+10%	+15%	+20%								
			BCIS Change									-10%	-5%	0%	+5%	+10%	+15%	+20%
Site 4	Green 50	25,000	525,000	640,842	905,183	1,372,896	1,433,866	1,698,207	1,962,549	2,226,890		1,626,215	1,397,870	1,372,896	941,180	712,835	484,490	256,145
Site 5	Green 30	25,000	525,000	792,959	1,051,337	1,516,072	1,568,092	1,826,470	2,084,847	2,343,225		1,737,884	1,523,799	1,516,072	1,095,629	881,544	667,459	453,375
Site 6	Green 20	25,000	525,000	871,267	1,131,000	1,598,554	1,650,467	1,910,200	2,169,934	2,429,667		1,821,633	1,606,183	1,598,554	1,175,284	959,834	744,384	528,935
Site 7	Green 12	50,000	550,000	721,821	946,432	1,360,166	1,395,653	1,620,264	1,844,874	2,069,485		1,534,348	1,352,695	1,360,166	989,390	807,737	626,084	444,431
Site 8	Green 9	50,000	550,000	1,210,220	1,569,726	2,148,530	2,288,738	2,648,243	3,007,749	3,367,255		2,591,242	2,260,237	2,148,530	1,598,227	1,267,221	936,216	598,599
Site 9	Green 9 DRA	50,000	550,000	1,185,352	1,554,335	2,210,888	2,292,303	2,661,287	3,030,271	3,399,254		2,534,128	2,228,724	2,210,888	1,617,915	1,312,510	1,007,106	697,886
Site 10	Green 5	50,000	550,000	1,055,154	1,462,457	2,100,259	2,255,175	2,651,005	3,046,835	3,442,665		2,622,586	2,240,965	2,100,259	1,477,079	1,084,397	687,611	287,191
Site 18	Brown 30	2,500,000	3,000,000	820,013	1,136,858	1,706,586	1,770,548	2,087,394	2,404,239	2,721,084		1,990,848	1,722,275	1,706,586	1,185,131	916,559	647,987	379,415
Site 19	Brown 18	2,500,000	3,000,000	866,198	1,178,247	1,741,442	1,802,343	2,114,391	2,426,439	2,738,487		2,020,571	1,755,433	1,741,442	1,225,157	960,018	694,880	429,740
Site 20	Brown 12	2,500,000	3,000,000	620,179	818,036	1,172,568	1,213,750	1,411,607	1,609,464	1,807,320		1,348,509	1,182,201	1,172,568	849,585	683,277	516,969	348,167
Site 21	Brown 8	2,500,000	3,000,000	1,489,065	1,878,290	2,509,415	2,656,740	3,045,965	3,435,190	3,824,414		2,952,892	2,610,204	2,509,415	1,924,826	1,582,138	1,239,143	886,522
Site 22	Brown 4	2,500,000	3,000,000	1,262,307	1,633,407	2,227,695	2,366,421	2,726,366	3,082,549	3,438,732		2,641,195	2,322,601	2,227,695	1,677,227	1,351,674	1,022,629	693,584

South, excluding Burgess Hill

		EUV	BLV	Residual Value (£ per gross ha)														
			Value Change	-10%	-5%	0%	+5%	+10%	+15%	+20%								
			BCIS Change									-10%	-5%	0%	+5%	+10%	+15%	+20%
Site 1	Green 350	25,000	525,000	943,812	1,132,290	1,478,631	1,509,246	1,697,723	1,886,201	2,073,502		1,600,892	1,460,830	1,478,631	1,180,706	1,040,644	900,582	758,635
Site 2	Green 200	25,000	525,000	420,996	619,176	968,120	1,015,537	1,213,717	1,411,897	1,610,077		1,166,103	991,730	968,120	642,983	468,609	294,236	119,863
Site 3	Green 100	25,000	525,000	437,962	652,826	1,032,721	1,082,554	1,297,418	1,512,282	1,727,146		1,245,220	1,056,455	1,032,721	678,925	490,161	301,396	112,631
Site 4	Green 50	25,000	525,000	545,679	804,734	1,253,786	1,322,843	1,581,897	1,840,952	2,100,006		1,520,478	1,292,133	1,253,786	835,443	607,098	378,753	150,408
Site 5	Green 30	25,000	525,000	699,943	953,153	1,399,408	1,459,573	1,712,783	1,965,994	2,219,204		1,634,533	1,420,448	1,399,408	992,278	778,193	564,108	350,023
Site 6	Green 20	25,000	525,000	777,763	1,032,302	1,481,012	1,541,379	1,795,918	2,050,456	2,304,995		1,717,740	1,502,290	1,481,012	1,071,391	855,941	640,491	425,041
Site 7	Green 12	50,000	550,000	640,961	861,080	1,258,556	1,301,317	1,521,435	1,741,553	1,961,672		1,444,504	1,262,851	1,258,556	899,545	717,892	536,239	352,162
Site 8	Green 9	50,000	550,000	1,080,798	1,433,114	1,987,807	2,137,745	2,490,061	2,842,377	3,194,692		2,447,440	2,116,434	1,987,807	1,454,424	1,123,419	791,228	449,656
Site 9	Green 9 DRA	50,000	550,000	1,052,517	1,414,122	2,044,187	2,137,330	2,498,934	2,860,538	3,222,142		2,386,535	2,081,130	2,044,187	1,470,321	1,164,917	859,512	546,014
Site 10	Green 5	50,000	550,000	908,525	1,307,682	1,923,300	2,088,926	2,476,840	2,864,753	3,252,666		2,464,254	2,082,633	1,923,300	1,314,157	921,476	521,479	121,060
Site 11	Flats 100	2,500,000	3,000,000	-891,318	-278,048	718,935	886,326	1,458,536	2,030,745	2,602,955		1,509,111	911,614	718,935	-304,581	-944,492	-1,594,203	-2,243,913
Site 12	Flats 40	2,500,000	3,000,000	-570,710	-193,133	423,271	529,667	881,341	1,233,015	1,584,689		914,022	546,007	423,271	-210,279	-605,148	-1,005,332	-1,405,516
Site 13	Flats 20	2,500,000	3,000,000	-485,831	-153,305	399,701	492,584	802,823	1,113,063	1,423,303		826,815	504,579	399,701	-165,891	-510,949	-861,352	-1,211,755
Site 14	Flats 10	2,500,000	3,000,000	-487,671	-153,745	403,714	499,726	821,239	1,135,615	1,447,011		835,153	506,820	403,714	-160,839	-501,400	-847,368	-1,193,336
Site 15	Flats 6	2,500,000	3,000,000	-612,712	-205,438	466,834	592,085	990,847	1,384,495	1,775,551		1,071,485	632,404	466,834	-245,757	-695,093	-1,150,139	-1,605,185
Site 16	Brown 120	2,500,000	3,000,000	667,088	956,391	1,467,990	1,534,996	1,824,299	2,113,602	2,402,904		1,748,787	1,497,240	1,467,990	994,147	742,600	491,053	239,506
Site 17	Brown 60	2,500,000	3,000,000	679,530	980,846	1,506,996	1,583,477	1,884,792	2,186,108	2,487,424		1,810,904	1,546,532	1,506,996	1,017,790	753,419	489,048	224,676
Site 18	Brown 30	2,500,000	3,000,000	705,949	1,016,457	1,563,852	1,637,474	1,947,982	2,258,490	2,568,998		1,864,110	1,595,537	1,563,852	1,058,393	789,821	521,249	252,620
Site 19	Brown 18	2,500,000	3,000,000	753,861	1,059,668	1,600,484	1,671,283	1,977,090	2,282,897	2,588,704		1,895,752	1,630,614	1,600,484	1,100,337	835,199	570,061	301,303
Site 20	Brown 12	2,500,000	3,000,000	548,951	742,851	1,083,433	1,130,650	1,324,550	1,518,449	1,712,349		1,269,366	1,103,058	1,083,433	770,442	604,135	437,827	266,731
Site 21	Brown 8	2,500,000	3,000,000	1,348,944	1,730,385	2,335,415	2,493,265	2,874,706	3,256,146	3,637,587		2,797,202	2,454,514	2,335,415	1,769,136	1,426,448	1,078,941	725,852
Site 22	Brown 4	2,500,000	3,000,000	1,127,765	1,494,019	2,063,851	2,212,488	2,569,646	2,918,705	3,267,764		2,498,685	2,175,998	2,063,851	1,530,624	1,202,183	873,137	544,092
Site 26	East of Ansty	25,000	525,000	605,241	737,253	981,197	1,001,277	1,133,068	1,263,717	1,394,365		1,069,765	969,894	981,197	768,636	668,007	566,282	463,455
Site 28	South of Reeds Lane	25,000	525,000	682,574	832,952	1,112,087	1,133,560	1,283,279	1,432,104	1,580,930		1,211,888	1,098,139	1,112,087	868,372	753,400	636,255	519,110

Burgess Hill and adjacent

		EUV	BLV	Residual Value (£ per gross ha)														
			Value Change	-10%	-5%	0%	+5%	+10%	+15%	+20%								
			BCIS Change									-10%	-5%	0%	+5%	+10%	+15%	+20%
Site 11	Flats 100	2,500,000	3,000,000	-1,969,800	-1,406,593	-549,946	-289,594	248,093	765,282	1,282,471		408,708	-205,330	-549,946	-1,493,096	-2,142,806	-2,795,823	-3,455,793
Site 12	Flats 40	2,500,000	3,000,000	-1,233,534	-887,393	-363,766	-200,229	133,288	455,274	773,134		236,983	-147,603	-363,766	-941,435	-1,341,619	-1,741,803	-2,141,987
Site 13	Flats 20	2,500,000	3,000,000	-1,070,561	-765,202	-302,348	-159,565	134,658	425,946	707,365		222,431	-115,678	-302,348	-810,246	-1,160,649	-1,511,052	-1,861,455
Site 14	Flats 10	2,500,000	3,000,000	-1,074,580	-768,083	-303,497	-160,028	135,290	430,609	722,648		212,312	-121,517	-303,497	-807,554	-1,153,522	-1,499,489	-1,845,457
Site 15	Flats 6	2,500,000	3,000,000	-1,329,000	-954,938	-390,614	-213,106	147,313	507,732	868,151		304,636	-134,445	-390,614	-1,035,923	-1,490,969	-1,946,015	-2,401,061
Site 16	Brown 120	2,500,000	3,000,000	667,088	956,391	1,467,990	1,534,996	1,824,299	2,113,602	2,402,904		1,748,787	1,497,240	1,467,990	994,147	742,600	491,053	239,506
Site 17	Brown 60	2,500,000	3,000,000	679,530	980,846	1,506,996	1,583,477	1,884,792	2,186,108	2,487,424		1,810,904	1,546,532	1,506,996	1,017,790	753,419	489,048	224,676
Site 18	Brown 30	2,500,000	3,000,000	705,949	1,016,457	1,563,852	1,637,474	1,947,982	2,258,490	2,568,998		1,864,110	1,595,537	1,563,852	1,058,393	789,821	521,249	252,620
Site 19	Brown 18	2,500,000	3,000,000	753,861	1,059,668	1,600,484	1,671,283	1,977,090	2,282,897	2,588,704		1,895,752	1,630,614	1,600,484	1,100,337	835,199	570,061	301,303
Site 20	Brown 12	2,500,000	3,000,000	548,951	742,851	1,083,433	1,130,650	1,324,550	1,518,449	1,712,349		1,269,366	1,103,058	1,083,433	770,442	604,135	437,827	266,731
Site 21	Brown 8	2,500,000	3,000,000	1,348,944	1,730,385	2,335,415	2,493,265	2,874,706	3,256,146	3,637,587		2,797,202	2,454,514	2,335,415	1,769,136	1,426,448	1,078,941	725,852
Site 22	Brown 4	2,500,000	3,000,000	1,127,765	1,494,019	2,063,851	2,212,488	2,569,646	2,918,705	3,267,764		2,498,685	2,175,998	2,063,851	1,530,624	1,202,183	873,137	544,092

HDH Planning and Development Ltd is a specialist planning consultancy providing evidence to support planning authorities, landowners and developers. The firm is regulated by the RICS.
The main areas of expertise are:

- Community Infrastructure Levy (CIL)
- District wide and site specific Viability Analysis
- Local and Strategic Housing Market Assessments and Housing Needs Assessments

HDH Planning and Development have clients throughout England and Wales.

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