

UK National Brownfield Forum
– 2023/24 Sector Review

May 2024

CL:AIRE

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Executive Summary

The National Brownfield Forum (NBF) 2023/24 sector review was an online survey open to the brownfield industry and interested parties between August and September 2023. It successfully attracted over two hundred respondents including a diverse range of public and private sector organisations across the UK. The sector review covered four themes:

- Theme 1 – barriers to brownfield development;
- Theme 2 – unlocking the financial barriers to brownfield development;
- Theme 3 – regulatory matters; and
- Theme 4 – workforce skills shortage.

Highlights of the results of the NBF 2023/24 sector review include:

1. Overwhelming support by respondents for proactive Government policies to support the development of brownfield land in the UK;
2. Barriers to expedient and cost-effective development are complex and interdependent, including a lack of consistency in regulatory approaches to excavated soils and waste management, land contamination, environmental permitting, and land use planning regimes;
3. A need improve our understanding of the wider social, environmental, and economic values of brownfield development;
4. Strong sense of importance and value for the regulatory role offered by local authorities and national agencies;
5. Regulatory roles are insufficiently funded;
6. A call for greater fiscal and financial support for both the public and private sector to support brownfield development;
7. An opportunity to improve the quality and efficiency of land contamination advice and support available to the brownfield sector both from public and private sector perspectives;
8. Professional competence frameworks such as the National Quality Mark Scheme exist but more needs to be done to widen its use and acceptance; and
9. Recruitment into the sector remains challenging, despite clear proactive organisational policies and initiatives such as equality, diversity and inclusion and training.

The NBF would like to extend its thanks to everyone who participated in this first-of-its-kind UK sector review. It is hoped that users of this report take benefit from the summaries but also take the time to read and assess the raw data so that they can direct efforts and make informed decisions.

This report and the raw survey responses are available to download directly from the CL:AIRE website (www.clare.co.uk).

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1. Introduction

The National Brownfield Forum (NBF) 2023/24 sector review was an online survey open to the brownfield industry and interested parties between August and September 2023.

This report summarises the results of the sector review based on four themes:

- Theme 1 – barriers to brownfield development;
- Theme 2 – unlocking the financial barriers to brownfield development;
- Theme 3 – regulatory matters; and
- Theme 4 – workforce skills shortage.

The sector review results for each theme are presented as short factual summaries with supporting figures. The report concludes with some closing remarks from its authors.

The Microsoft Forms survey report is presented in Appendix 1. For a more comprehensive understanding, it is recommended that users refer to the raw data, which are more expansive and informative. This report and the raw data are available to download directly from the CL:AIRE website (www.claire.co.uk).

What is the National Brownfield Forum?

The NBF was established by the Department for Communities and Local Government (DCLG) (now Department for Levelling Up, Housing and Communities (DLUHC)) and the Department for Environment, Food and Rural Affairs (DEFRA) in 2011. The aim of the NBF is to promote the sustainable (re)use of land. It represents a member group of private and public sector organisations interested in taking an open and forward-looking strategic overview of current and future land use issues including:

- Taking into consideration the full range of social, economic, and environmental factors in informing the development and implementation of Government policy;
- Supporting the development, dissemination, and adoption of best practices by regulators, practitioners and problem owners;
- Identifying key challenges as they arise and seeking appropriate resolutions; and
- Openly reporting on progress and outcomes.

The NBF considers UK-wide issues and references overseas experience where appropriate. Representation of organisations on the NBF is kept under review and seeks to promote engagement with a broad spectrum of interests including regulators, local government and industry groups.

CL:AIRE is the secretariat for the NBF, and all notes from its meetings are publicly available on CL:AIRE's website (www.claire.co.uk/brownfieldforum).

What is the sector review and why is it important?

The NBF 2023/24 sector review was an open online survey conducted between August and September 2023, aimed at all individuals and organisations with an interest in brownfield development for public good.

Brownfield land, also referred to as previously developed land is defined by the National Planning Policy Framework (NPPF)¹ as:

“Land which is or was occupied by a permanent structure, including the curtilage of the developed land and any associated fixed surface infrastructure (subject to exclusions).”²

In terms of promoting brownfield land to achieve sustainable development, Paragraph 23 of the NPPF states that:

“Strategic [planning] policies should set out a clear strategy for accommodating objectively assessed needs, in a way that makes as much use as possible of previously-developed or ‘brownfield’ land.”³

In many cases brownfield land is derelict, underused, contaminated and suffers from land stability issues. It is principally the land use planning system combined with a collective societal desire that is helping to bring brownfield land back into beneficial use. Progressing this agenda provides an opportunity to create sustainable places where people can live, work and interact with their environment.

To this end, DLUHC has made development on brownfield land a focus of specific policies and funding⁴. Devolved administrations have their own policies and financial incentives.

Despite supportive planning policies, complex barriers exist which challenge the development of brownfield land. To better understand what these are in the UK, the NBF, under its remit to facilitate knowledge exchange around the use of brownfields, conducted an industry-wide sector review in 2023.

To ensure a diverse range of views, the sector review was promoted to landowners, developers, consultants, contractors, investors, insurers, and research organisations together with officers from local and national regulators.

The contents of the sector review were co-designed with a range of groups representing industry, local authorities, regulators and Government. The sector review was tested before release with a test group and their feedback was included.

It is hoped that the results of the sector review can be used as evidence to assist members of the NBF and other organisations in focusing their collective resources and stimulate future discussions around the questions raised.

¹ NPPF is used as an example of national policy in England. Each devolved administration has its own planning policies that should be referred to where appropriate.

² <https://www.gov.uk/guidance/national-planning-policy-framework/annex-2-glossary#prev-dev-land>

³ <https://www.gov.uk/guidance/national-planning-policy-framework/1-1-making-effective-use-of-land>

⁴ [https://www.gov.uk/government/news/derelict-sites-to-be-transformed-into-new-homes-as-new-brownfield-fund-opens#:~:text=unused%20brownfield%20sites-,_Derelict%20and%20underused%20brownfield%20sites%20across%20England%20will%20be%20transformed.today%20\(8%20July%202022\)](https://www.gov.uk/government/news/derelict-sites-to-be-transformed-into-new-homes-as-new-brownfield-fund-opens#:~:text=unused%20brownfield%20sites-,_Derelict%20and%20underused%20brownfield%20sites%20across%20England%20will%20be%20transformed.today%20(8%20July%202022))

Limitations

This sector review is not being delivered directly on behalf of the UK Government. It is a voluntary initiative to inform, understand and formally record brownfield sector views from those directly involved in its regeneration.

The NBF cannot guarantee the delivery of time-limited solutions to the problems identified. However, the NBF can via its membership seek to inform the development and implementation of Government policy and industry initiatives by widely sharing and highlighting the views expressed.

2. Results

Who responded?

The sector review attracted 222 respondents who self-declared that most of their practice was either in England (71%), Scotland (6%), Wales (<1%) and Northern Ireland (<1%); the remainder (21%) declared representation for all or a combination of UK nations. In completing the survey, respondents could provide answers to questions in one or more of the four themes; theme-based response numbers are included in the relevant sections of this report. All questions together with responses and graphics are presented in an automated Microsoft Forms report in Appendix 1.

Survey respondents self-declared from a range of public (30%) and private sector (70%) backgrounds. Representations were made either by an individual (41%), organisation (15%), or both (44%). Figure 1 provides a breakdown of the individual or organisation type declared by each respondent.

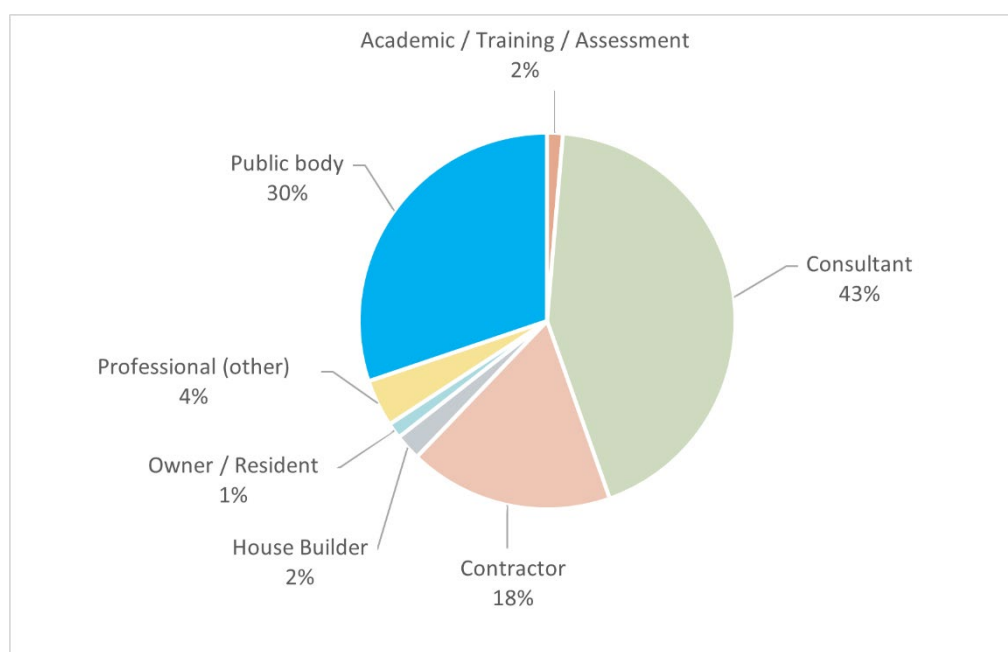
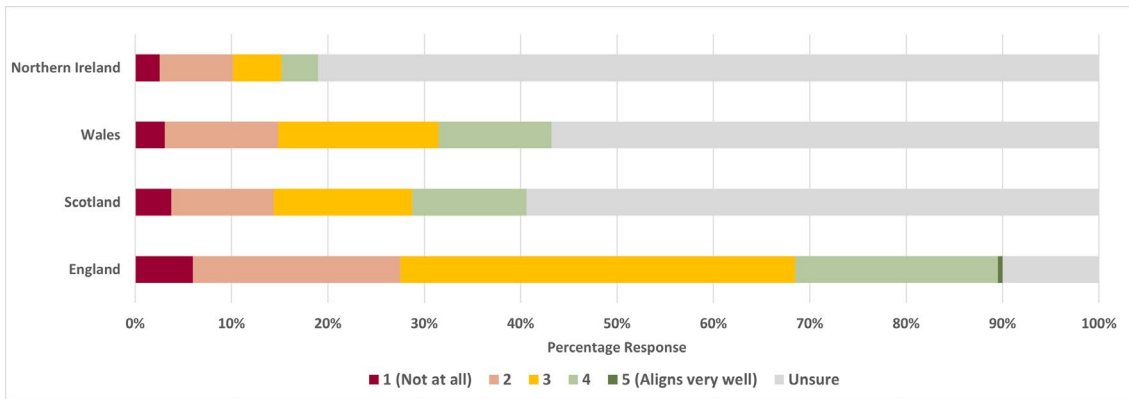


Figure 1: Breakdown by respondent individual or organisation type.

Theme 1 – barriers to brownfield development (Q9-18)

Responses to Theme 1 (207; 93%) were the highest out of the four themes.

A large proportion of Theme 1 respondents (97%) felt bringing brownfields back into productive use should be a key Government and devolved administration priority. However, Figure 2 shows that the dominant feeling in England was that national policy does not align well with the execution and successful delivery of brownfield development. The picture appears more favourable for the devolved nations although the number of responses for each nation was much lower and was dominated by professional services and contractors who declared their practice covered all nations.



NB: The number of respondents were higher for England than the devolved nations.

Figure 2: How well national policy aligns with the execution and successful delivery of brownfield development.

The perception of the value of brownfield sites varied between respondents. Many saw brownfields as a positive opportunity (71%) or as a necessity to help meet sustainability and net zero targets (44%). Others saw brownfield development as a risk or liability to be managed (75%) while much fewer thought brownfield sites are a liability to be avoided (13%). A small proportion did not give an answer (<1%). Respondents could select more than one option for this question and tick all options they felt applied.

Brownfields are often seen as an alternative to greenfield sites (i.e. not previously developed). Greenfield sites are often in the countryside, which as a result can create strong views in favour of their protection. The sector review asked whether greenfield sites are being selected for development ahead of brownfield sites over the past five years. A little over half of respondents thought that the development of greenfield sites had increased in favour of brownfield sites (56%), with 13% stating it had not and a proportion unsure (30%).

Based on an assumption that brownfield development is generally preferable to greenfield, the remaining questions in this theme focused on barriers to brownfield development.

Figure 3 shows that the reasons believed to lead to the promotion of greenfield over brownfield were varied and include policy, incentives, and poorly understood benefits of brownfield development. Most respondents agreed with five of the six factors presented, the exception being the location of brownfields.

Other factors leading to an increase in development on greenfield rather than brownfield sites were varied but consistently covered policy conflicts (waste and biodiversity), economic viability, financial risks, expertise and skills (private and public sector), delays in decision making, lack of strategic oversight and targets for developing brownfield land, and the increase in demand for new homes.

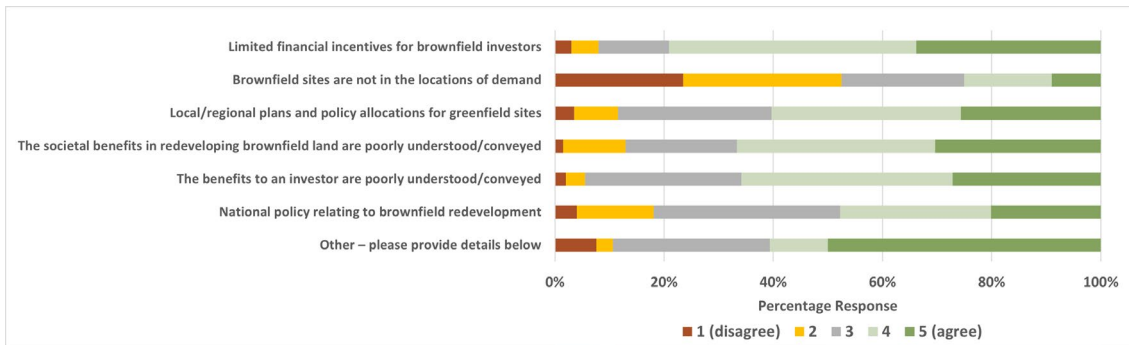


Figure 3: Ranked factors that could be leading to the promotion of greenfield over brownfield development.

The sector review asked respondents how they felt about the engineering, policy and regulatory challenges to brownfield development posed by eighteen different factors. Figure 4 shows that excavated soils and waste management, land contamination, [environmental] permitting issues, and the overall planning process were considered the most challenging, followed closely by geotechnical land stability, asbestos, ecology, and biodiversity.

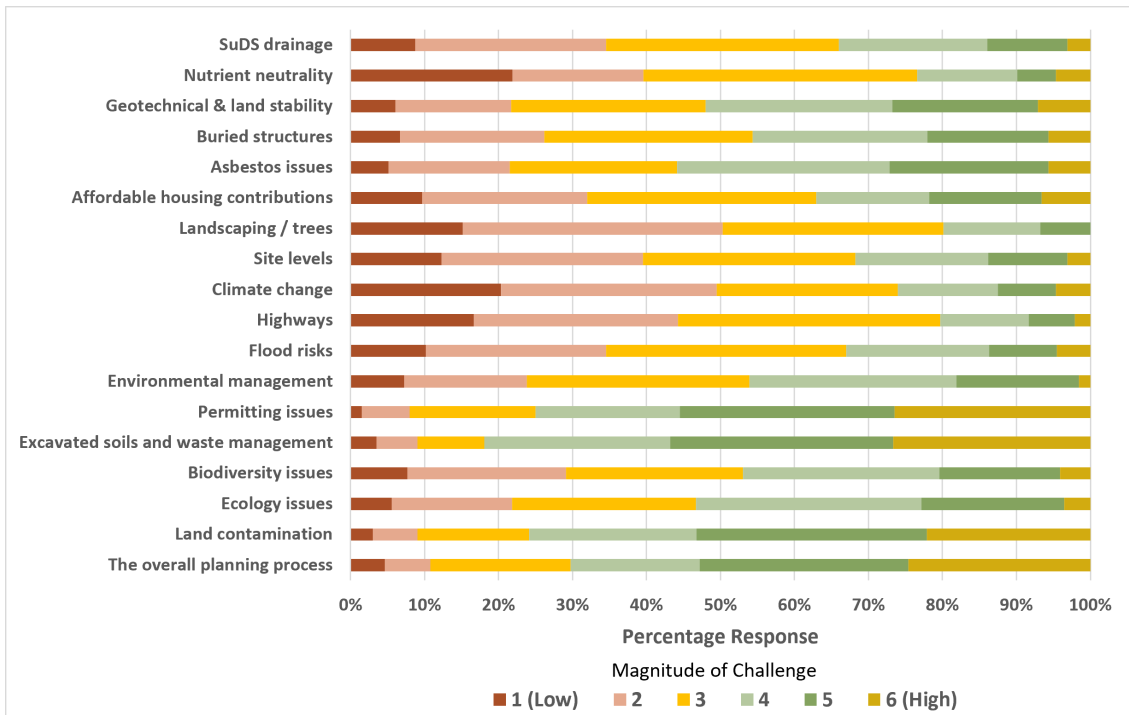


Figure 4: Consideration of the magnitude of the challenge posed by different factors to the development of brownfield land.

The final question in Theme 1 focused on ranking barriers to brownfield development. Figure 5 shows that respondents felt that the biggest barriers were the upfront investor uncertainties and the regulatory process. Other comments made in the free text box for this question included underfunding of regulatory system, lack of regulatory consistency (e.g. waste and planning), quality of professional advice (private and public sector), and strategic oversight of wider urban development.

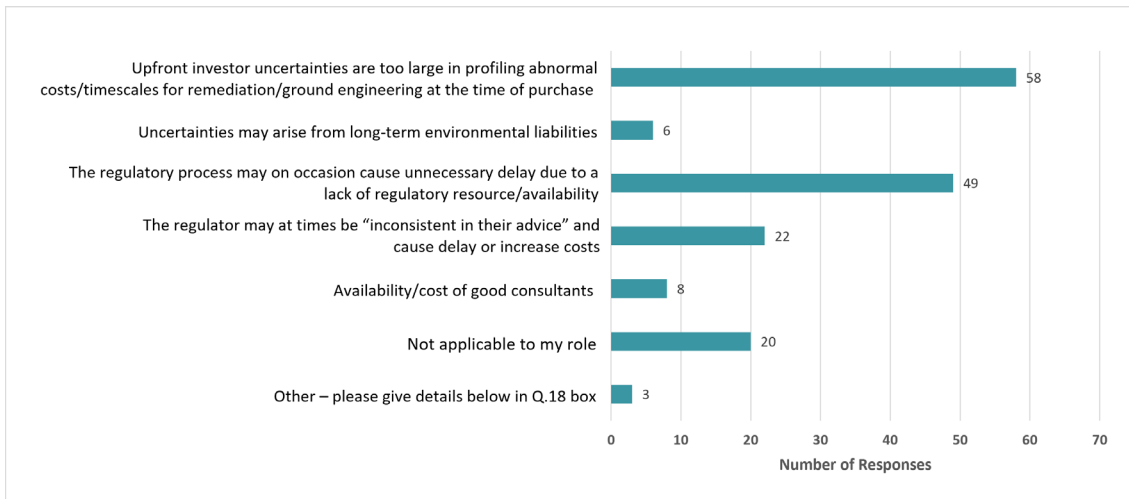


Figure 5: Barriers to brownfield development with respect to investor risk.

Theme 2 – unlocking the financial barriers to brownfield development (Q19-30)

Responses to Theme 2 (161; 73%) were the lowest out of the four themes.

Theme 2 started with questions about tax relief for brownfield remediation of soil and groundwater contamination and land stability hazards. Most of the respondents identified that an increase in land remediation tax relief⁵ would incentivise brownfield development by reducing investor risk (81%); remaining respondents answered either no (7%) or not sure (12%). A large proportion felt that if such an increase were to occur the focus should be on benefitting smaller builders (50%) to help them with cash flow and make their business more resilient to market variability. Some of the respondents disagreed (24%) and some were not sure (12%).

Implicit to land remediation tax relief is the definition of 'derelict land', which currently relates to land unused since 1998. The majority of respondents felt that the definition should change to land unused since 2011 (11 years, rather than 25 years) (83%). Only a very few felt that no change was required to the definition (5%), while some remained unsure (12%).

This theme continued to explore financial barriers to brownfield development and potential new policy measures including a new greenfield surcharge⁶. A large proportion of respondents agreed that a greenfield surcharge should be introduced as part of the extant community infrastructure levy (CIL)⁷ (77%); just a minority felt it should not (8%) with the remainder unsure (15%). If such a surcharge were to be introduced, the majority of respondents felt that the income should be channelled to the local authority to offset the cost of development infrastructure (71%); few disagreed (8%) and some were unsure (19%).

⁵ <https://www.gov.uk/hmrc-internal-manuals/corporate-intangibles-research-and-development-manual/cird60015>

⁶ <https://eic-uk.co.uk/media/yxcikjvo/making-better-use-of-our-land.pdf>

⁷ <https://www.gov.uk/guidance/community-infrastructure-levy>

This theme also explored other ways in which financial barriers could be unlocked. Suggestions from the free text box included:

1. Streamlined planning system: developers seek greater speed, consistency, and support from the planning system to overcome upfront costs associated with brownfield sites;
2. Simplify and align regulations and policy: simplifying planning and aligned regimes to mitigate additional costs and uncertainties;
3. Resource allocation: address the lack of resources for local authorities and regulators to effectively manage brownfield redevelopment;
4. Tax incentives: suggestions include reducing taxation on brownfield development, reintroducing landfill tax exemptions for contaminated land;
5. Government support and funding: proposals include government-backed funds linked to risk and economic benefit for local areas, as well as subsidies and grants for brownfield development. Small sites were highlighted as a focal point as were decentralised funding mechanisms.
6. Regulatory and policy adjustments: advocacy for better regulation and incentives for soil reuse and treatment, reforming waste permitting regulations, ensuring appropriate resourcing for regulatory bodies, policy changes such as tighter planning requirements on greenfield sites and incentivising proper soil reuse and treatment;
7. Awareness and education: increase awareness and valuation on the wider benefits and opportunities of brownfield redevelopment (e.g. social), as well as educating on good practice and competence of site investigation and remediation procedures; and
8. Stakeholder collaboration: encouragement for better communication between regulators and developers, as well as cooperation between different stakeholders in the redevelopment process.

Theme 2 concluded by exploring how contractual and longer-term financial liability of brownfield development is managed by asking about collateral warranties and professional indemnity. Of those respondents who considered collateral warranties relevant to their role most said they were required (70%). This requirement was driven by requests from a site/owner (55%) and principal contractors (17%). Note that responses to this question ($n=112$) were higher than those that said it was relevant to their role ($n=85$).

Theme 3 – regulatory matters (Q31-44)

Responses to Theme 3 (203; 91%) were second highest out of the four themes.

Theme 3 focused on understanding the role of formal advice on land contamination including: timeliness of advice, expertise, and quality and professional standards.

Regulatory advice for brownfield development is generally provided by trained technical/scientific officers through planning representatives in Local Planning Authorities, the Environment Agency (EA) (England), Natural Resources Wales (NRW) (Wales), the Scottish Environment Protection Agency (SEPA) (Scotland) and the Northern Ireland Environment Agency (NIEA) (Northern Ireland). The advisory and regulatory support

relates principally to land use planning, waste, environmental permitting, and groundwater protection.

Responses on the timeliness of advice through the planning process by planning officers in local authorities are summarised in Figure 6. No respondents were excluded from this or other service-specific question. For non-regulatory respondents (73%) most people felt that, at least in some authorities, responses to land contamination issues were not timely. Figure 7 shows that when asked about the level of expertise in local authorities, respondents mostly highlighted that levels vary between local authorities with specific examples ranging equally between insufficient to excellent.

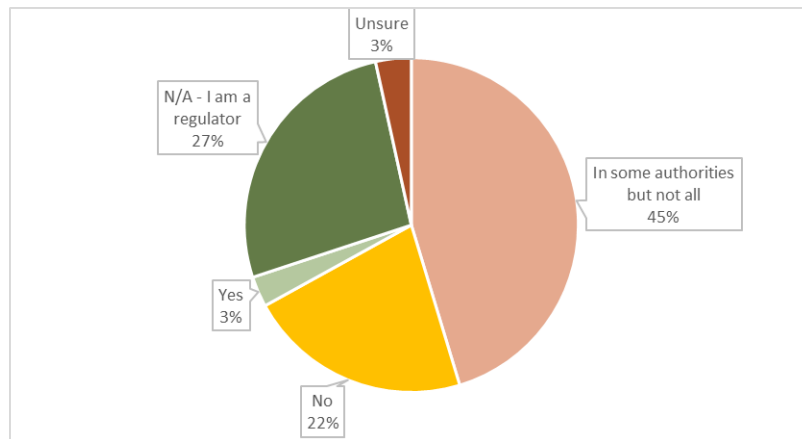


Figure 6: Timeliness of advice received through the planning process (i.e. where respondents were expecting a response to land contamination matters through the planning process, is a response received on time?).

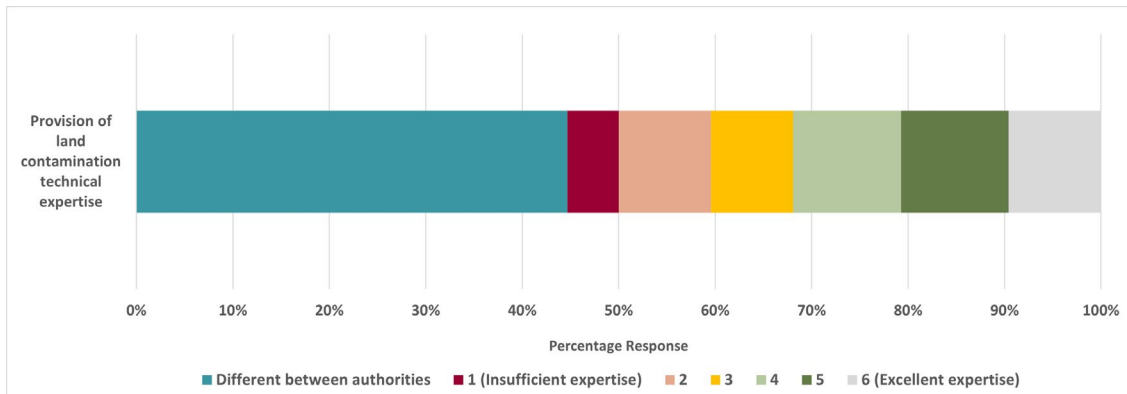
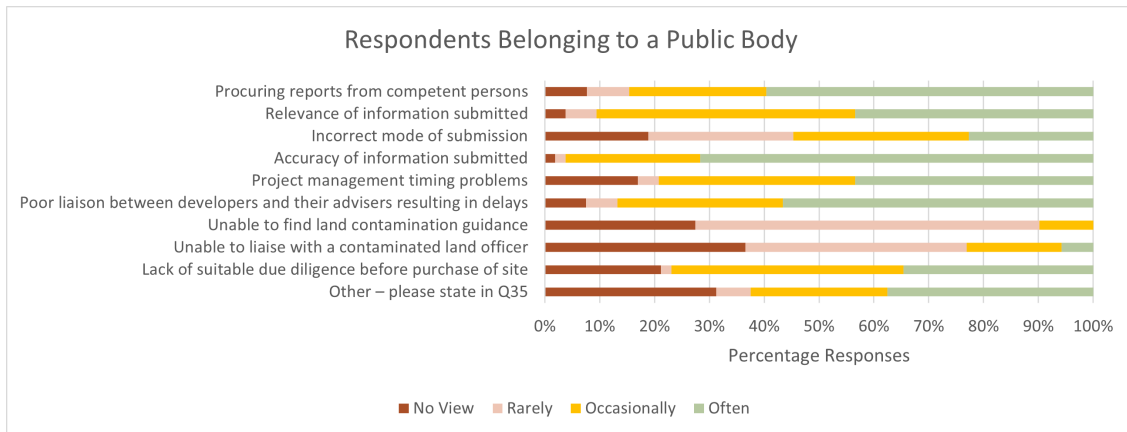


Figure 7: Opinions on the provision of land contamination technical expertise by local authorities regularly worked with.

Theme 3 then explored the reasons for the delays experienced in the planning process. Figure 8 shows nine ranked reasons for delays, based on the frequency of each possible reason experienced by public body and other respondents. The frequency of delay was topped by poor liaison between developers and their advisors, project management and timing problems, and the accuracy of the information submitted. Respondents were also given the chance to add 'other reasons'. Note that responses differed between regulators and those receiving advice. Public bodies suggested that 'procuring reports from competent persons', 'accuracy of submitted information' and 'relevance of information submitted' were often the cause of delays. Other respondents highlighted that most causes were only occasionally encountered.

(a)



(b)

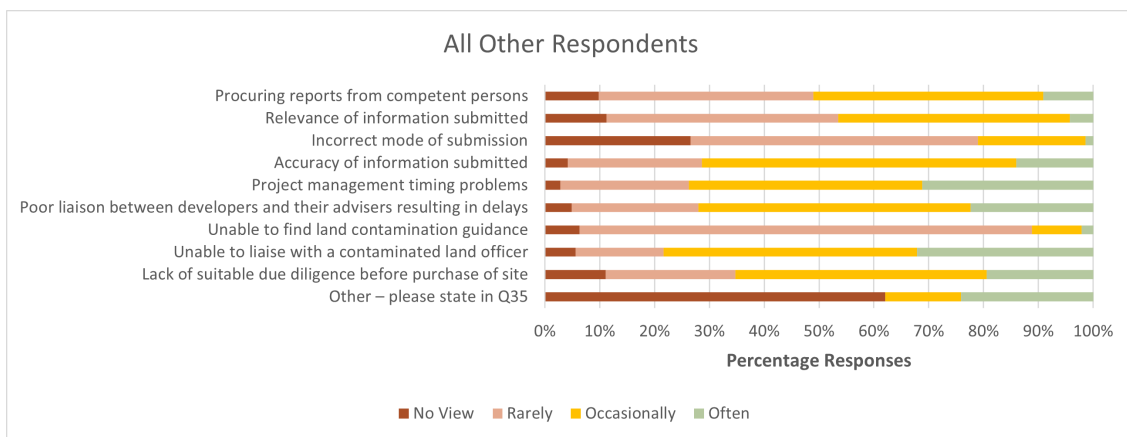


Figure 8: Reasons for delays in the planning process by (a) respondents belonging to a public body (b) all other respondents.

Other factors suggested in the free text boxes that were responsible for delays in the planning process included:

1. Quality of reports: spotlight on the pervasive problem with the quality of reports submitted by consultants. The standards of reports were described as "minimum viable products", lacking in-depth analysis and leaving room for doubts about their conclusions. This often leads to prolonged back-and-forth communications to resolve issues;
2. Outsourcing challenges: some local authorities outsource contaminated land expertise to consultants based on cost, resulting in delays due to insufficient experience or resources. Consultants may prioritise stringent investigations to protect their professional standing, leading to delays and communication challenges;
3. Regulatory delays: regulatory bodies were highlighted for slow response times, which contribute to project delays. However, there is also acknowledgement that developers sometimes delay submitting environmental reports, exacerbating the issue;
4. Communication and coordination: communication between consultants, developers, and local authorities can lead to misunderstandings, delays, and disagreements over project requirements and execution; and

5. Political influence: delays can occur within the planning process due to political fast-tracking of projects, bypassing necessary technical assessments and specialists, which can lead to complications later on.

When asked separately whether local authorities have sufficient and competent resources available to them to reply in a timely manner, responses suggested they do not (38%) or in some authorities but not all (56%). When asked the same question but about Agency staff (SEPA, NRW, EA, NIEA), replies were also heavily weighted to no (38%) or in some regions but not all (56%).

One-hundred and twenty responses were received to a follow-up two-part question about the impact of under-resourcing and how funding models might be changed. Examples of free text responses were selected from the raw data to reflect the cross-section of comments and are presented below:

“A dedicated, increased planning application fee specifically for the land contamination assessment could help fund the organisations further. We have often paid the EA separately for advice to move a project along and this gets a response quicker than standard applications.” (Specialist remediation contractor, UK wide)

“Staff not understanding reports, thus assuming since they have a report its “OK”. Planners are being pushed to get housing through, so don’t want to be held up by CLOs or even EHOs.” (Government organisation)

“Adequate funding provided from Central Government to the Local Authorities. The present funding model isn’t wrong, it hasn’t provided enough due to Central Government political decisions.” (Environmental Consultant, Scotland)

Building on the question about funding models, potential solutions to the issues of planning delays and resources were explored. Figure 9 summarises responses about the degree of improvement that might arise from eight suggestions to enhance the effectiveness of contaminated land officers and Agency officers (EA, SEPA, NRW, NIEA). Response results were generally equally balanced about whether improvements might be made or not by each solution. Forty comments were received suggestive of other options. Free text responses were presented in the raw data and a few selected quotes are shown below:

“Local authority and regulatory services need much better funding.” (Environmental consultant, England)

“Mandatory use of National Quality Mark Scheme (NQMS) [an NBF initiative administered by CL:AIRE⁸] and pre-app discussions (prior to submissions) would speed up planning consultations as the baseline quality of reports submitted should improve.” (Agency Officer)

“A large proportion of CLO time is spent dealing with substandard, incorrect, poor reports that don’t meet national guidance and best practice. Reports often bounce back and forth with little improvement. Environmental consultants should be required to meet a certain standard or [use a] national accreditation body that would look at substandard reports so there is some course of action that can be taken or at least a more manageable system.” (Contaminated land officer, England)

⁸ <https://www.claire.co.uk/projects-and-initiatives/nqms>

“Quick easy to access appeal system where the CLO has asked for something that is patently absurd. Applicant pays, if appeal upheld the council pay and refund money to applicant.” (Environmental consultant, England).

“EA should be the sole regulatory body for contaminated land - both Part IIA and under planning. Local authorities are not up to task.” (Legal professional, England)

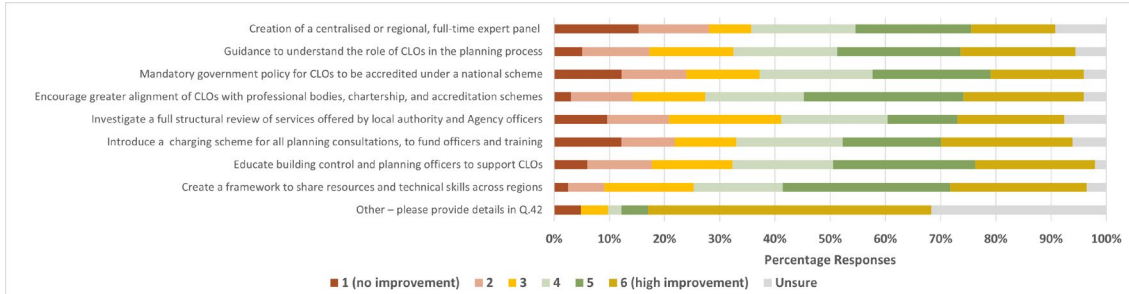


Figure 9: Degree of improvement that might arise from a range of suggested changes to raise the effectiveness of contaminated land and Agency officers.

Quality and professional standards were addressed by the remainder of Theme 3. These questions were geared partly around the NQMS⁹.

When asked whether a mandatory Government policy on a minimum competence standard for land contamination professionals would help support regulators, 52% felt it would, 26% thought it would not, and 22% were unsure. A follow-up question was posed on the NQMS. Figure 10 shows that views differ between respondent type. Public bodies appear to have strong views that the NQMS does not currently provide support for the role and responsibilities of local authorities, while views from other organisation types were more balanced and in favour of the scheme. These views should be taken in context with the number of overall respondents for each organisation type and that justification for the responses were not part of the question.

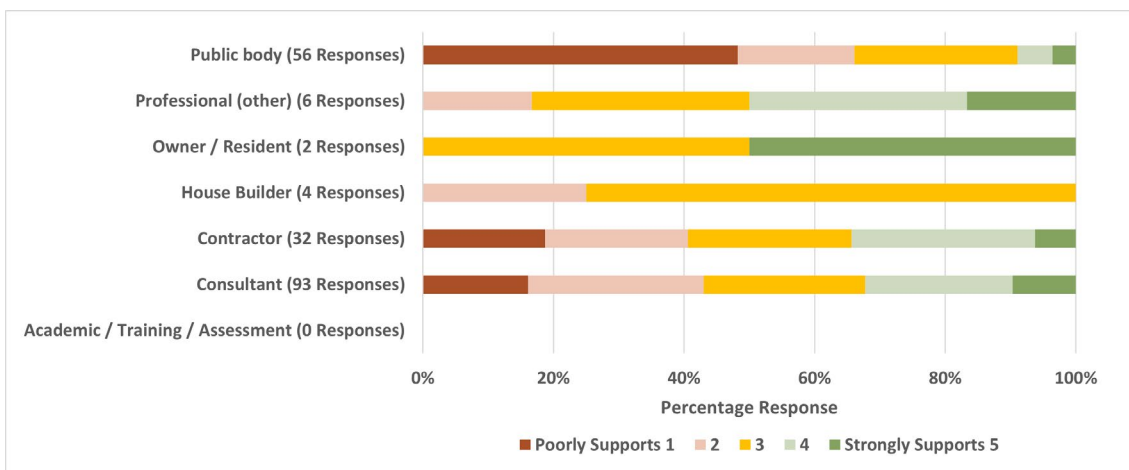


Figure 10: Does the NQMS support the role and responsibilities of local authorities?

Theme 4 – workforce skills shortage (Q45-60)

Responses to Theme 4 (189; 85%) were the third highest out of the four themes.

Theme 4 focused on questions related to workforce skills, recruitment and training.

Responses to questions in Theme 4 confirm there appears to be a skills shortage or at least an issue with recruiting skills into the range of organisations represented by the sector review. This is shown by most respondents have had difficulty recruiting skilled and competent staff (74%). Figure 11 shows that it is especially difficult to recruit geoenvironmental specialists (42%), risk assessors (29%), remediation specialists (23%), waste specialists (23%), hydrogeologists (22%), and regulatory experts (21%) (there was no limit imposed to the responses selected). Respondents said that they have the greatest difficulty in recruiting those with a particular level of experience (61%), in particular candidates with 2 to 10 years of experience (56%). Recruitment difficulties did not seem to be geographically linked (40%).

When probed about efforts being made to maximise recruitment, 92% have confirmed they have an equality, diversity, and inclusion policy. Of the respondents, 51% offer graduate training programmes, some of which are endorsed by professional institutions (18%) and some offer apprenticeship scheme opportunities (26%). A small proportion of respondents indicated that their training was in line with the SiLC National Brownfield Skills Framework (NBSF)⁹ (12%), more were not (26%). These responses may have been influenced by many of respondents not being aware of the NBSF (36%).

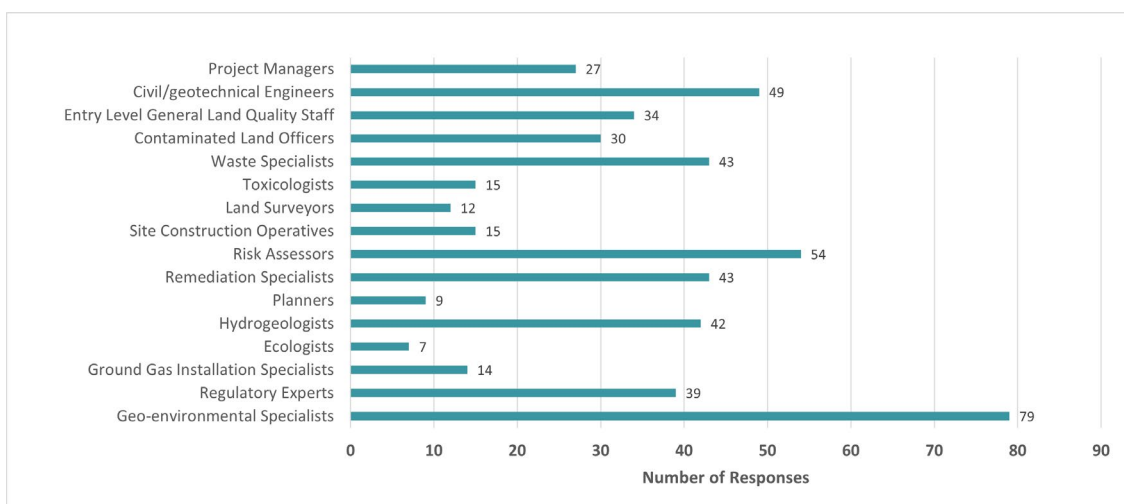


Figure 11: Specific workforce skills that are difficult to recruit for.

Respondents highlighted concerns with both under- and post-graduate training with many reporting that graduates do not have the right skills for the job types needed (36%). Missing skills mentioned in the free text box for this question were mainly transferable attributes and included: common sense, initiative, communication (written and verbal), conducting research, commercial and business awareness, field work. Respondents also suggested an understanding of the principles of land contamination and risk management were lacking, resulting in the need for extensive on the job training.

⁹ <https://www.silc.org.uk/mark-scheme/exam/downloads/skills-framework/>

3. Concluding Remarks

The NBF 2023/24 sector review successfully attracted over two hundred respondents from a range of public and private sector organisations across the UK.

The results confirm an overwhelming support for proactive policies to support the development of brownfield land in the UK. Respondents, however, identified that more could be done. It was highlighted that the barriers to expedient and cost-effective brownfield development are complex. It was also recognised that the true wider value of brownfield development is poorly understood and valued.

In equal measures, there is a strong sense of the importance and value of the regulatory role offered by local authorities and national agencies. However, it was highlighted that these roles are insufficiently funded and that more needs to be done to improve the quality and/ or efficiency of land contamination advice and support available to the brownfield sector. In a similar vein, private sector report quality and skills were questioned, which supports a shared need to resolve challenging quality of service issues for both the public and private sector.

Views on the quality and competence of land contamination advice, whether from a professional service or regulatory point, were varied. Existing frameworks such as the NQMS exist, but responses indicate that there is an opportunity to do more to widen their acceptance.

Recruitment into the sector remains challenging, even considering clear proactive organisational policies and initiatives such as equality diversity and inclusion and training. There was recognition that under-graduate training could be improved, especially in relation to transferable skills but also in land contamination skills.

The NBF would like to extend its thanks to everyone who participated in this first-of-its-kind UK brownfield sector review. It is hoped that users take the time to read and assess the raw data so that they can direct efforts and make informed decisions.

Lastly, the NBF would welcome any feedback on the review especially improvements that might be made and how questions and responses could in the future be enhanced to provide suitable evidence for member and wider community policy and decision-making.

Appendix 1

Microsoft Forms automated report of questions and responses.

National Brownfield Forum - 2023/24 Sector Review

222

Responses

51:16

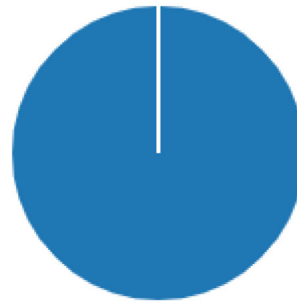
Average time to complete

Closed

Status

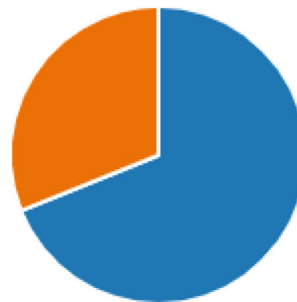
1. CONFIDENTIALITY

- Yes - I agree, understand and ac... 222
- No – I do not agree to the term... 0



2. If yes, would you be willing to provide additional clarity to your responses should you be contacted by CL:AIRE? Please ensure you provide your name and email below.

- Yes 153
- No 69



3. Name

171
Responses

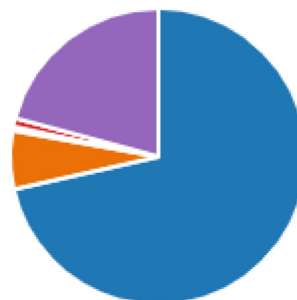
[Update](#)

4. Email

170 Responses

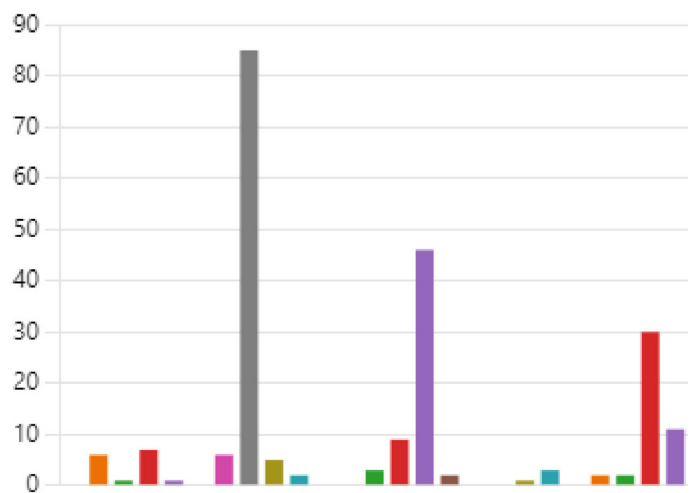
5. Country of majority practice?

● England	158
● Scotland	14
● Wales	1
● Northern Ireland	2
● All or combination of the above	46



6. A diversity of views is sought to ensure meaningful and balanced results. What is your role in the delivery of brownfield development?

● Agency Officer – non soil and gr...	0
● Agency Officer – soil and groun...	6
● Architect	1
● Civil engineering Contractor	7
● Designer	1
● Developer (non residential)	0
● Environmental consultant - non ...	6
● Environmental consultant – spec...	85
● House Builder	5
● Insurance Provider	2
● Investor	0
● Land Surveyor	0
● Legal Professional	3
● Local Authority – Environmental...	9
● Local Authority – Contaminated ...	46
● Local Authority – Planning Depa...	2
● Local Authority – Regeneration/...	0
● Local Authority – Building Contr...	0
● Logistics	1
● Non-Departmental Public Body	3
● Planning Consultant	0
● Researcher/Academic	2
● Site Owner	2
● Specialist remediation contractor	30
● Other	11



7. Does the selected answer above represent your role as an individual, an organisation, or both?

● Individual	90
● Organisation (company or an in...	34
● Both	98



8. 1. If completing on behalf of an organisation (company or an industrial group) please add their name?

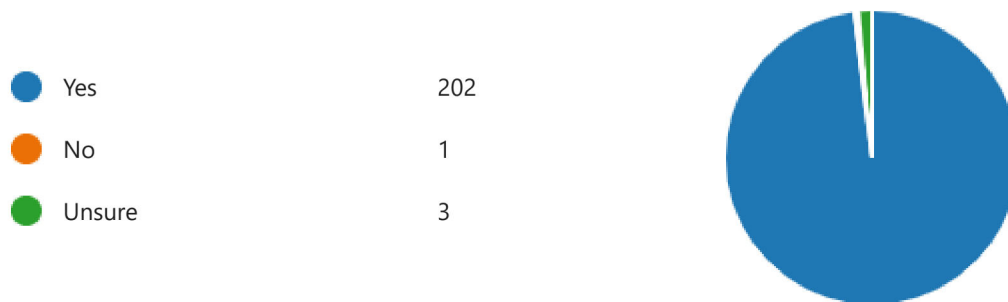
77 Responses

[Update](#)

9. Each Theme is optional. Would you like to answer questions on Theme 1: Understanding the barriers to brownfield development? **We estimate this section will take 7 minutes to answer.**

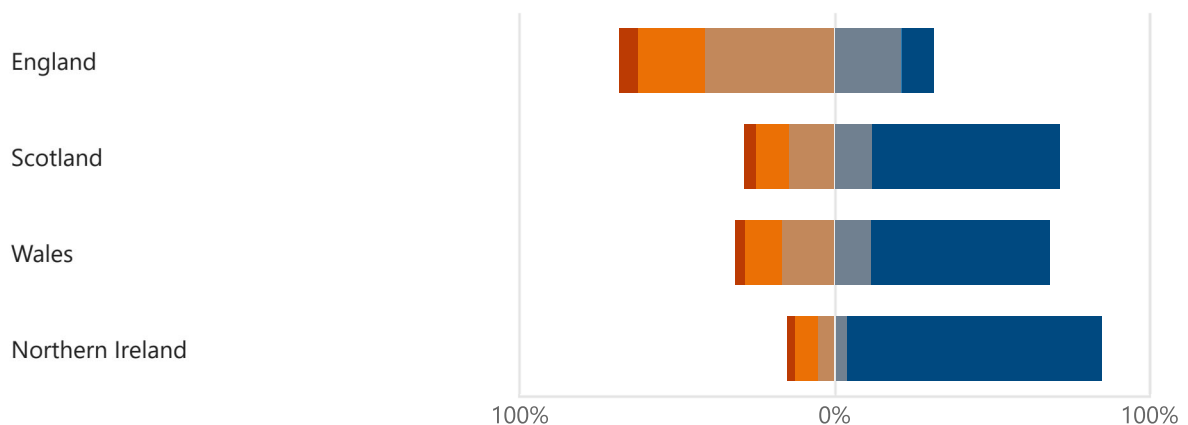


10. Should bringing brownfield land back into productive use be a UK government and the devolved administrations priority?








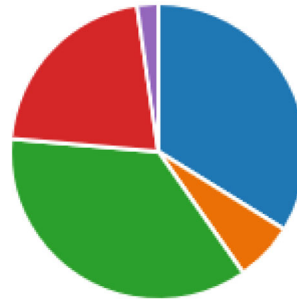
11. How well does national policy align with the execution and successful delivery of brownfield development in:

1 (Not at all) 2 3 4 5 (Aligns very well) Unsure



12. Do you (or your clients) consider brownfield land to be (tick all that apply)

	An opportunity	146
	A liability to be avoided	28
	A manageable risk/liability	156
	A necessity to help meet sustain...	92
	Other	10



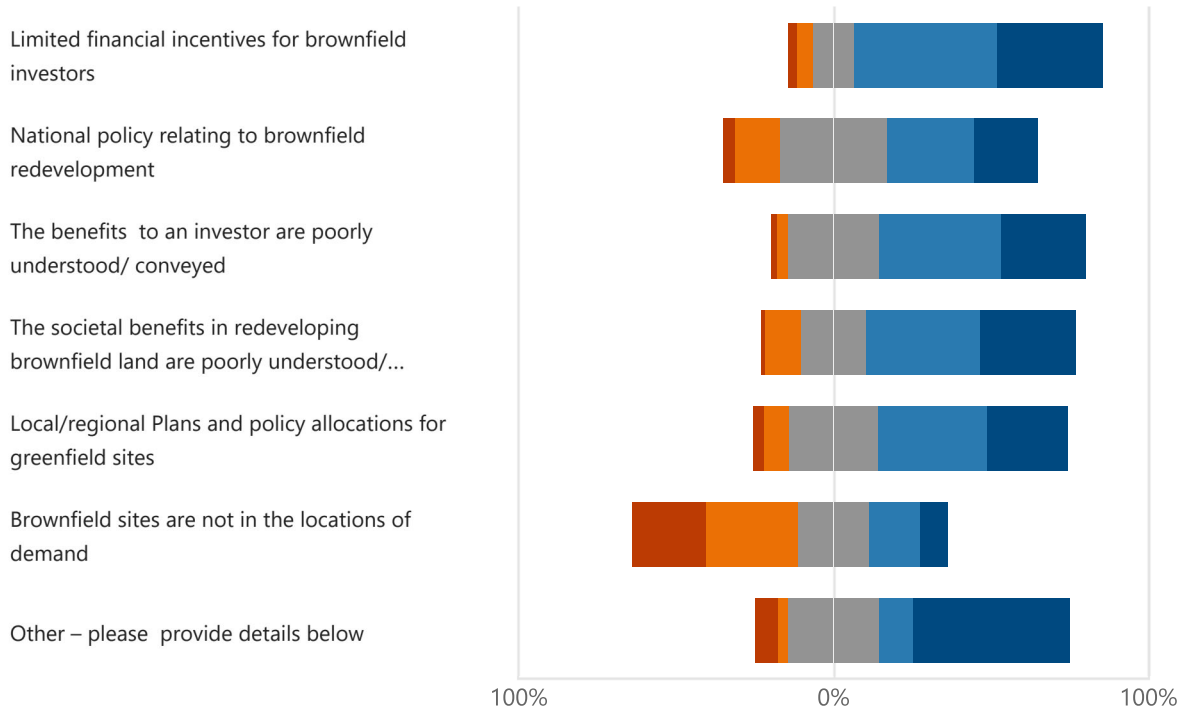
13. Has development on greenfield sites increased in favour of brownfield development in the last five years?

	Yes	116
	No	27
	Unsure	63



14. Please rank the factors that you feel could be leading to the promotion of greenfield over brownfield development.

1 (disagree) 2 3 4 5 (agree)



15. Other - provide details from question 14 above.

68 Responses

Latest Responses

"No comment "

"Predominantly rural area that encourages use of greenfield ..."

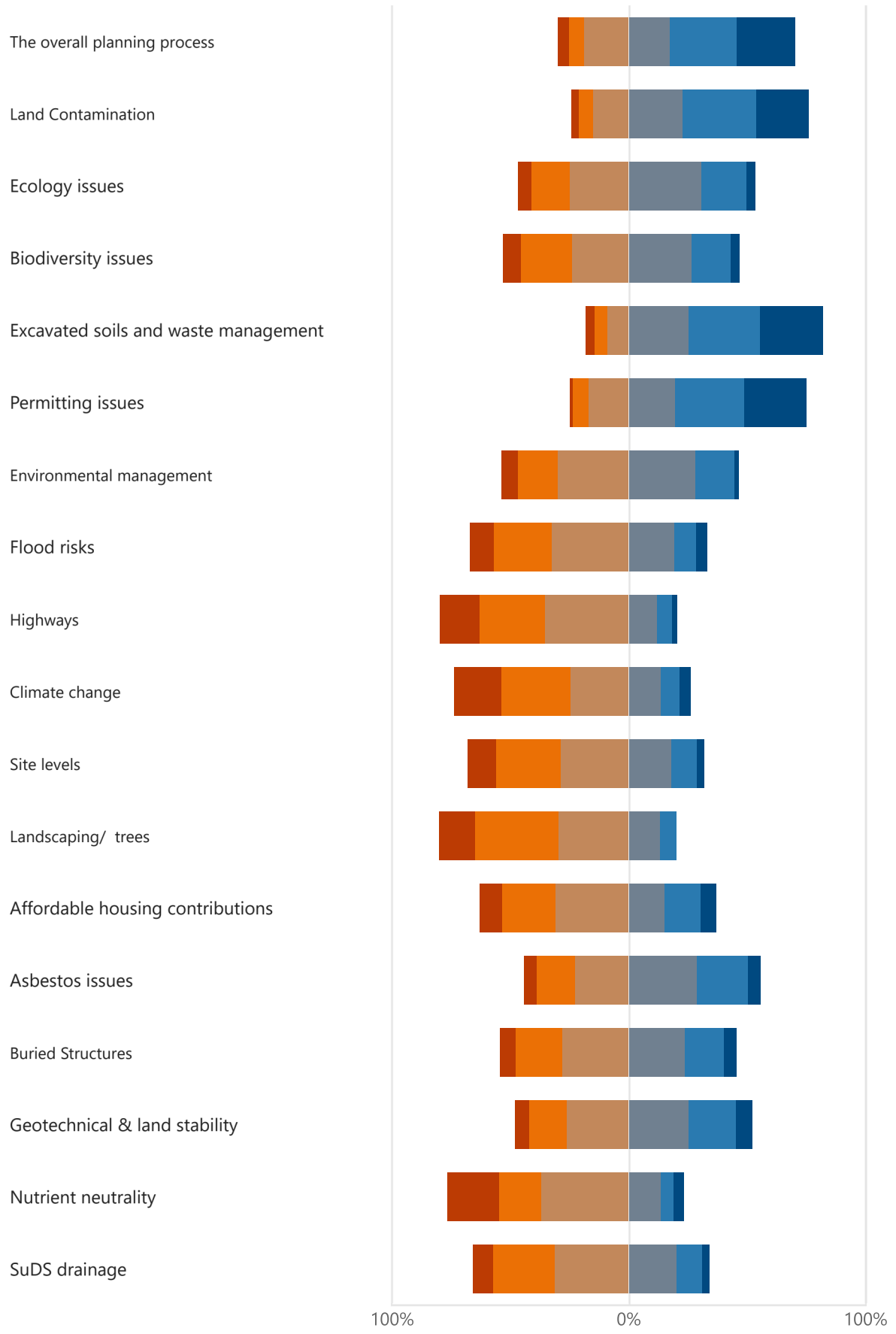
[Update](#)

12 respondents (19%) answered **developers** for this question.

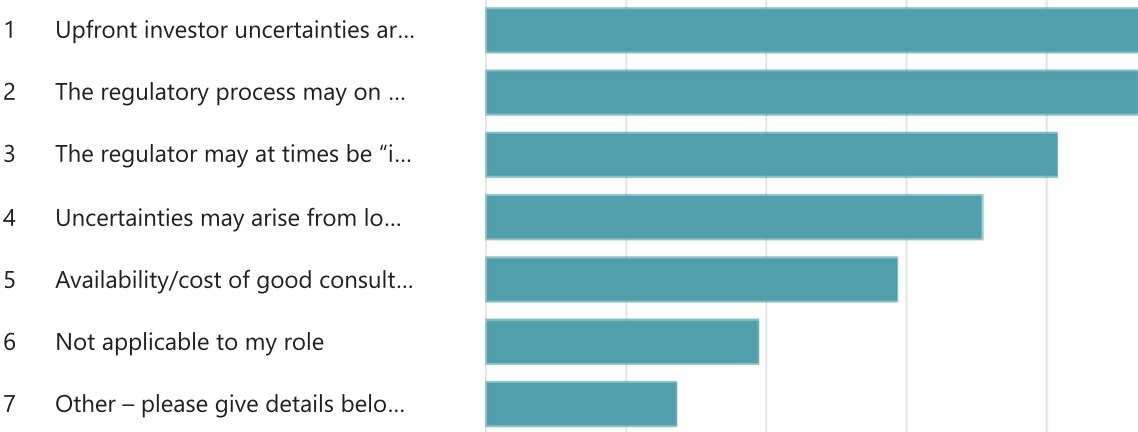


16. There are many different factors that can present a challenge to the redevelopment of brownfield land.

■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6



17. In respect of investor risk, please place in order of importance the barriers to brownfield development. To complete, please drag using left edge of each box, placing most important at the top.



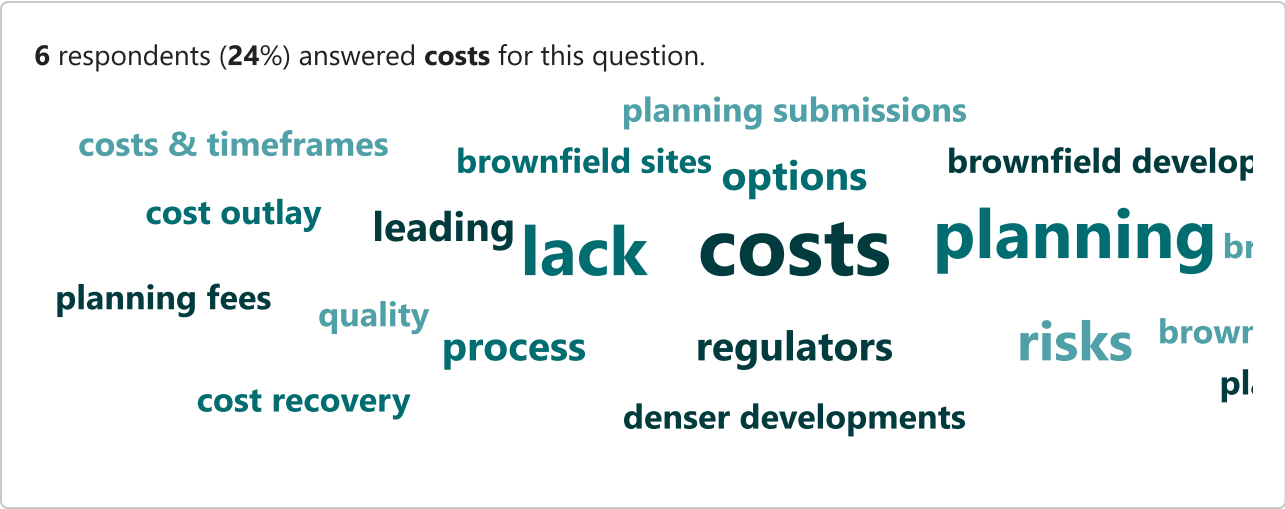
18. Other - please give further details from Q.17 above.

28
Responses

Latest Responses
"No comment "

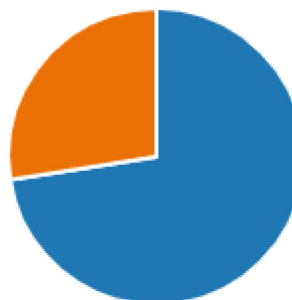
[Update](#)

6 respondents (24%) answered **costs** for this question.



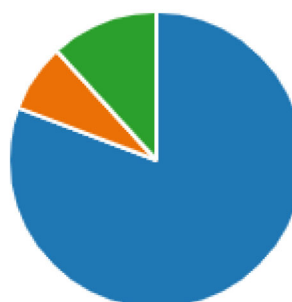
19. Each Theme is optional. Would you like to answer questions on Theme 2: Unlocking the financial barriers to brownfield development? **We estimate this section will take 4 minutes to answer.**

● Yes	161
● No, skip to next section	61



20. Do you believe that brownfield development would increase if land remediation tax relief on sites was increased to further incentivise and reduce risks to investors?

● Yes	130
● No	12
● Unsure	19



21. If an increase in tax relief was to occur, should it focus on the smaller builders and new entrants on the margin of development to increase cash flow and balance sheet strength i.e. to incentivise smaller firms to develop on brownfield land by making them more resilient to difficult market conditions?

● Yes	80
● No	39
● Unsure	42



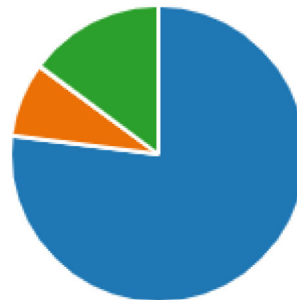
22. Do you believe that the tax relief definition of "derelict land" should be changed to be "land unused since 1 April 2011". The current definition of derelict means that the site must have been unused since 1 April 1998. A site would need to have been derelict for over 25 years for the additional relief offered for qualifying sites to be triggered. If enacted the site would only have needed to be unused in the last 11 years?

● Yes	134
● No	8
● Unsure	19



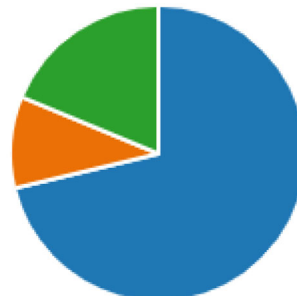
23. Should a greenfield surcharge be introduced as part of the new Community Infrastructure Levy (CIL)[5]?

● Yes	124
● No	13
● Unsure	24



24. If a greenfield surcharge is levied, should its earnings be earmarked by the local authority for infrastructure spending to mitigate the higher development costs of brownfield development?

● Yes	114
● No	16
● Unsure	30



25. How else do you think the financial barriers to brownfield development can be unlocked?

71
Responses

Latest Responses

"Better monetary valuation of wider social benefits that can b..."

[Update](#)

16 respondents (25%) answered **costs** for this question.



26. Are you regularly (most projects) required to provide collateral warranties (or similar) in relation to brownfield remediation projects?

● Yes	60
● No	25
● Not applicable to my role	76



27. If yes, who requires them?

● Site Owner/Client	61
● Principal Contractor	19
● Environmental Consultant	2
● At times a combination of the a...	18
● Other	12



28. Are you regularly required to provide Professional Indemnity Insurance for brownfield remediation projects that you work on?

● Yes	101
● No	7
● Not applicable	52



29. If yes, at what level are you typically required to provide?

● £<1M	5
● £1-5M	47
● £5-10M	47
● Other	6



30. If no, please explain why not

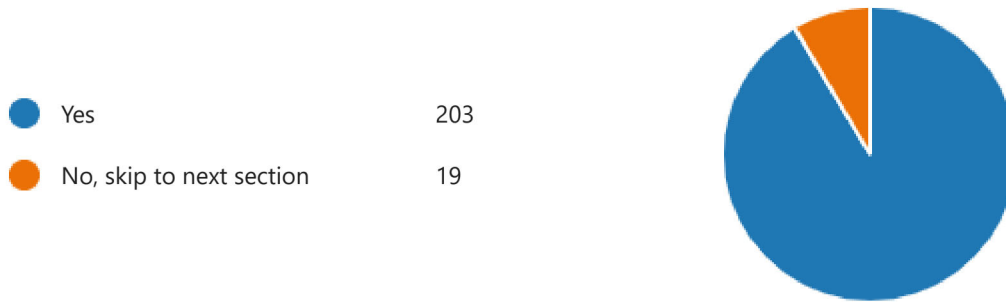
10
Responses

Latest Responses

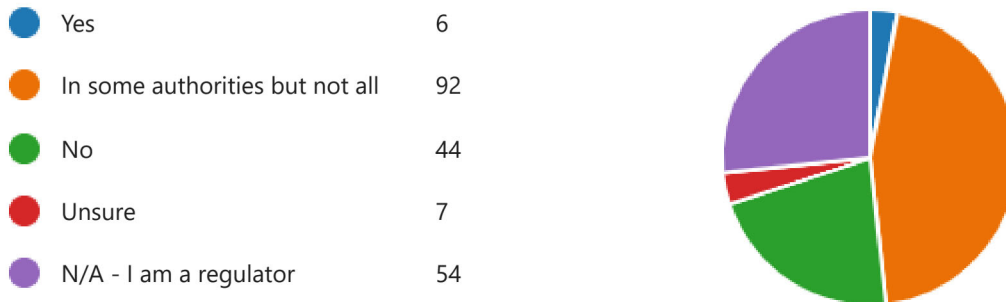
4 respondents (40%) answered **role** for this question.

smaller projects aware of the need **contractors**
investment surveyor **need for PI** **remedial work** **ha**
local authority **Warranties** **role** **work** **PI ins**
Not my role **PI** **Collateral Warranties** **design work**
larger ones **investors letters are more**

31. Each Theme is optional. Would you like to answer questions on Theme 3: Regulatory matters? We estimate this section will take 7 minutes to answer.

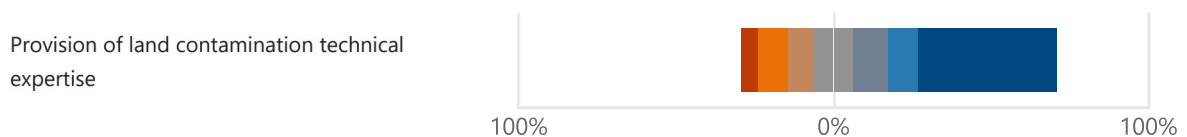


32. Where you are expecting a response on land contamination matters through the planning process (i.e., not directly from a CLO), in your experience, is a response received in a timely manner?



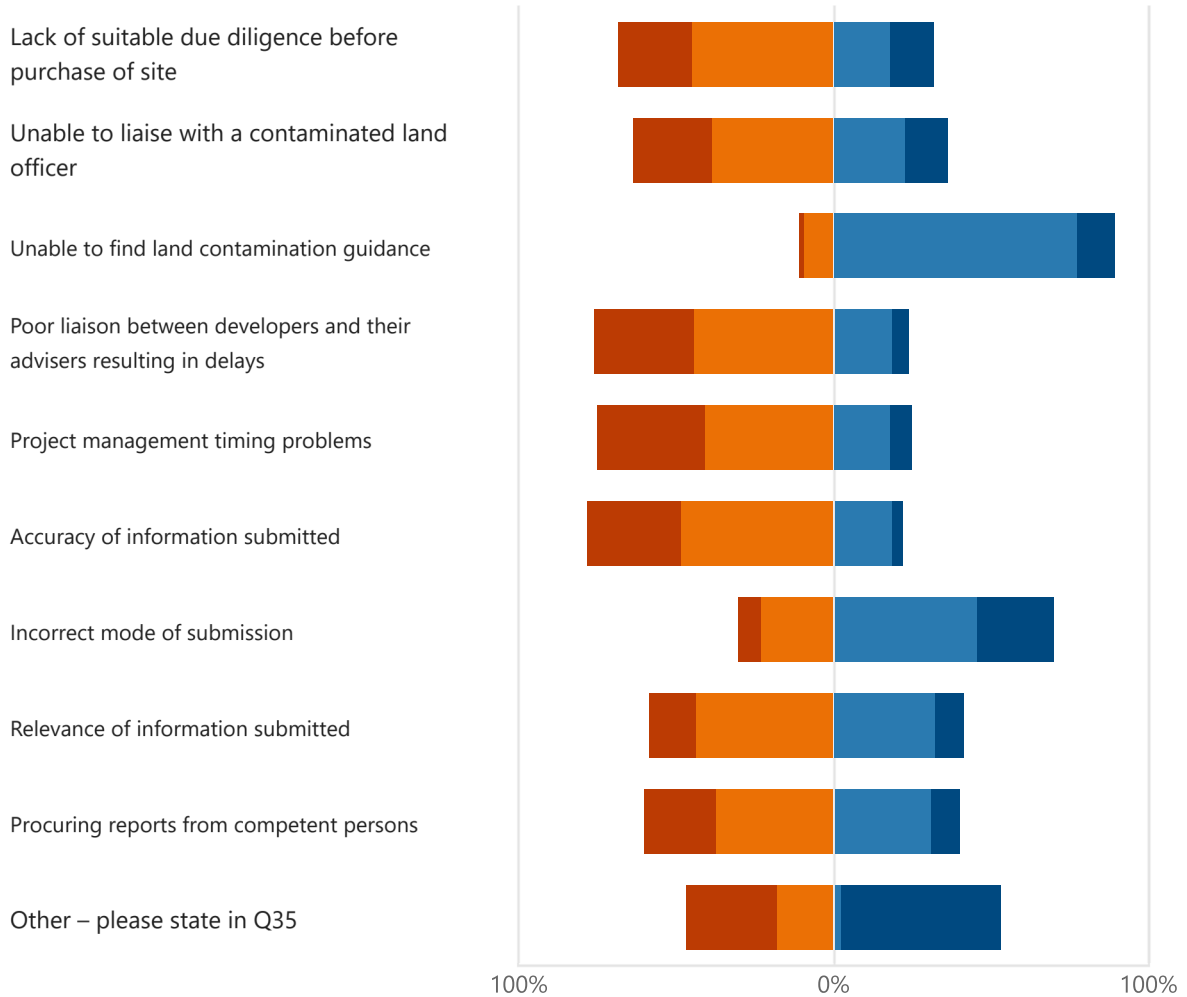
33. On a scale from 1-6, where 1 is insufficient expertise and 6 is excellent expertise, can you provide an opinion on the provision of land contamination technical expertise provided by those local authorities you regularly work with?

■ 1 insufficient expertise
 ■ 2
 ■ 3
 ■ 4
 ■ 5
 ■ 6 excellent expertise
■ Different between authorities



34. Local authority regulators note that delays can occur in the planning process for different reasons. In your experience, please rank how often the following delay factors arise during brownfield redevelopment:

■ Often
 ■ Occasionally
 ■ Rarely
 ■ No View



35. Other - please provide further details from Q34.

40
Responses

Latest Responses
"No comment"

[Update](#)

12 respondents (33%) answered **reports** for this question.



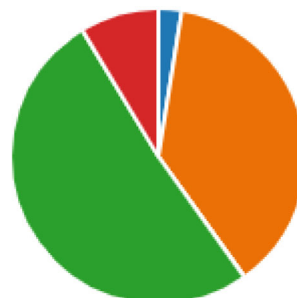
36. In your experience, how often are amendments or clarifications required to land contamination reports submitted under planning, before acceptance?

Always/almost always	42
Often	60
Sometimes	72
Rarely/Never	15
N/A – Unsure	10



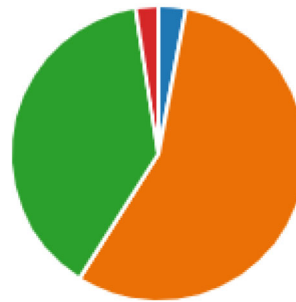
37. Do you consider that Agency Officers have sufficient competent resources available to them to respond to queries in a timely manner?

Yes	5
In some regions but not all	74
No	101
Unsure	17



38. Do you consider that Local Authority departments have sufficient competent resources available to them to respond to queries in a timely manner?

● Yes	6
● In some regions but not all	112
● No	77
● Unsure	5



39. Local authorities currently provide the funding for CLOs, usually either in the Environmental Health or Planning teams. Do you think funding should be secured differently?

● Yes	56
● No	45
● Unsure	99



40. If you consider land contamination regulators (CLO and Agency Officers) to be under resourced, from your perspective what is/are the impact(s) of this? How could they be funded differently?

123
Responses

Latest Responses

"I am not sure, sorry"

"Allocate part of the application fee to resource the regulator..."

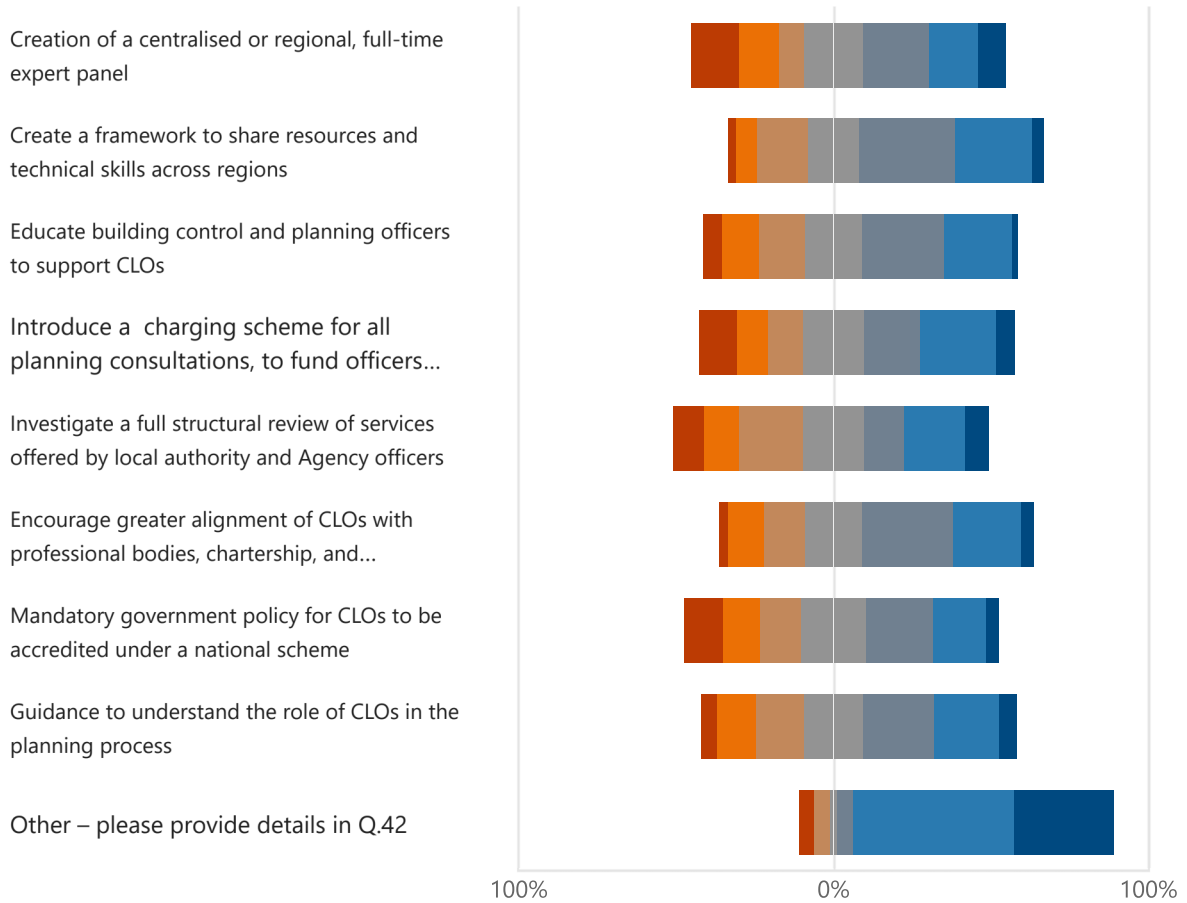
[Update](#)

32 respondents (30%) answered **funding** for this question.



41. To further facilitate brownfield development, please score how you think each of the following could increase the effectiveness of CLOs and Agency Officers?

■ 1 (no improve-ment)
 ■ 2
 ■ 3
 ■ 4
 ■ 5
 ■ 6 (high improve-ment)
 ■ Unsure



42. Other - please provide further details

45
Responses

Latest Responses
"No comment "

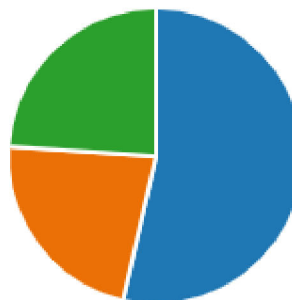
Update

13 respondents (33%) answered CLOs for this question.



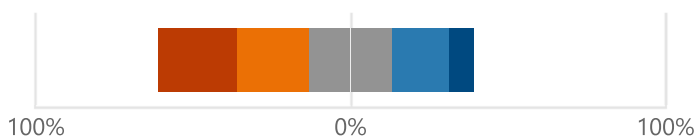
43. Would a mandatory government policy for the accreditation/competence of all professionals working in the field of land contamination, by way of a national scheme, be one step towards supporting the role of regulators?

● Yes	105
● No	44
● Unsure	47



44. On a scale of 1 to 6 to what extent do you think the National Quality Mark Scheme for Land Contamination Management (NQMS) www.claire.co.uk/nqms supports the role and responsibilities of the local authority

■ Poorly Supports 1
 ■ 2
 ■ 3
 ■ 4
 ■ Strongly Supports 6



45. Each Theme is optional. Would you like to answer questions on Theme 4: Workforce, skills shortage? **We estimate this section will take 4 minutes to answer.**

● Yes	189
● No, skip to next section	33



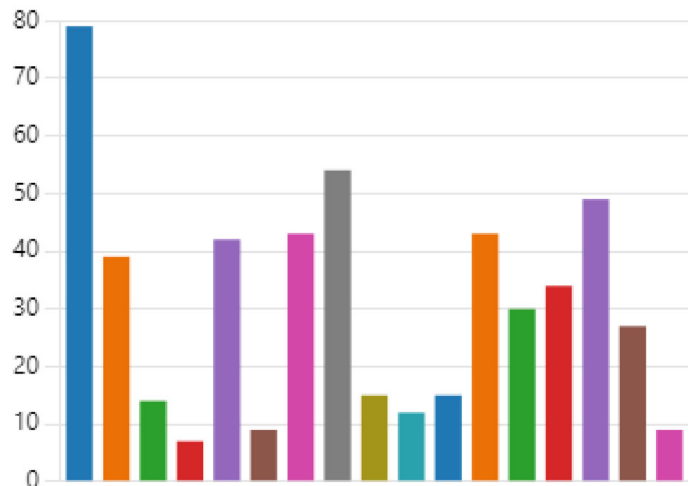
46. Do you have problems recruiting skilled and/or competent staff?

● Yes	139
● No	16
● Not applicable to my role	34



47. If Yes are there any specific skills particularly hard to recruit for, please select as many as are appropriate?

● Geo-environmental Specialists	79
● Regulatory Experts	39
● Ground Gas Installation Speciali...	14
● Ecologists	7
● Hydrogeologists	42
● Planners	9
● Remediation Specialists	43
● Risk Assessors	54
● Site Construction Operatives	15
● Land Surveyors	12
● Toxicologists	15
● Waste Specialists	43
● Contaminated Land Officers	30
● Entry Level General Land Quality...	34
● Civil/geotechnical Engineers	49
● Project Managers	27
● Other	9



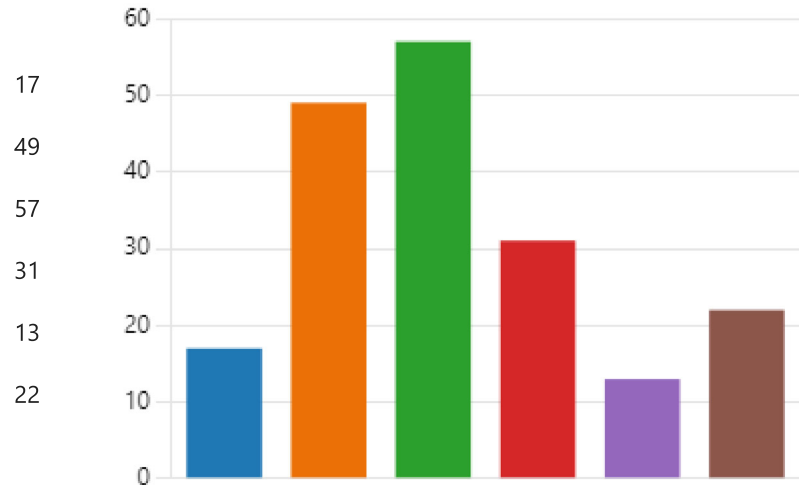
48. Is there a level of experience you particularly struggle to recruit?

● Yes	116
● No	22
● Not applicable to my role	44



49. If yes, please indicate

- 0-2 years
- 2-5 years
- 5-10 years
- 10-20 years
- 20 + years
- All



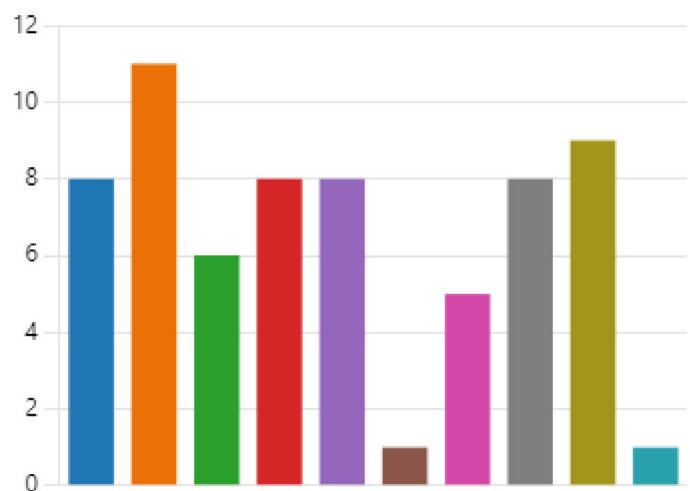
50. Is there a geographic region in which you particularly struggle to recruit in?

- Yes 41
- No 77
- Not applicable to my role 65



51. If yes please indicate

- London 8
- Midlands 11
- North East 6
- North West 8
- Yorkshire/Lincolnshire 8
- Northern Ireland 1
- Scotland 5
- South East 8
- South West 9
- Wales 1



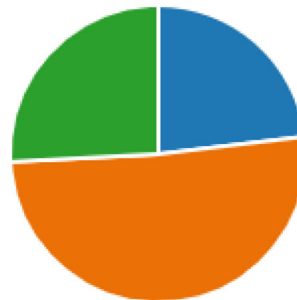
52. Do you have a Equity, Diversity, and Inclusion Policy?

● Yes	173
● No	7
● Not sure	4



53. Do you run an apprenticeship scheme with the inclusion of geosciences?

● Yes	43
● No	95
● Not applicable to my role	48



54. Do you believe that graduates leaving university and joining the workforce have the right quality of skills?

● Yes	53
● No	68
● Unsure	64



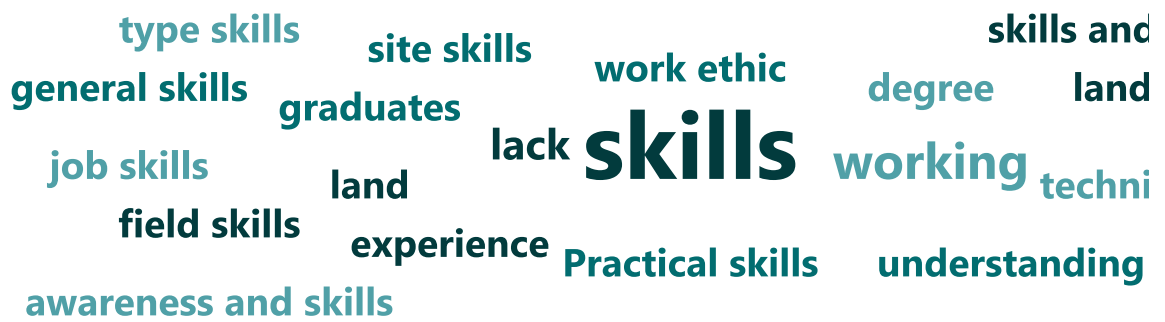
55. If no, what skills are missing?

74
Responses

Latest Responses

[Update](#)

24 respondents (35%) answered **skills** for this question.



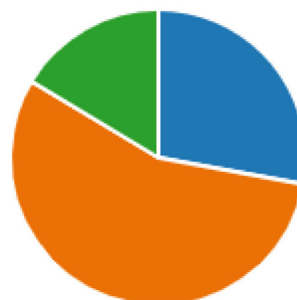
56. Does your company/organisation have an internal training programme for graduates to follow?

● Yes	96
● No	51
● Not applicable to my role	38



57. If yes, is this a professional institution endorsed framework?

● Yes	34
● No	68
● Unsure	20



58. If no, is your company/organisation framework in line with the National Brownfield Skills Framework[6]?

● Yes	23
● No	52
● Unsure	67



59. If no, were you aware of the National Brownfield Skills Framework?

● Yes	68
● No	69



60. Please share any further comments or feedback below.

35
Responses

Latest Responses

[Update](#)

10 respondents (31%) answered **land** for this question.

