Town Centre North, Crawley

Viability and Delivery Study

DTZ
125 Old Broad Street
London
EC2N 2BQ

26 May 2011

Executive Summary

This viability report has been produced to aid the Council's decision making processes on the future delivery of a major mixed use retail led development in Crawley town centre.

The Council has a continued desire to allocate part of Crawley town centre for a major retail led expansion of its comparison shopping offer with DTZ's recent updated retail capacity analysis work supporting this. However, du

completely (either through developer withdrawal, and/or a recognition by the Council that their project is now unviable/undeliverable. In Crawley, progress on TCN has stalled as a result of the economic recession.

1.7 The analysis described above and contained within this report has been underpinned by consideration of the Council's priorities and objectives for the town centre, which have been interpreted through a comprehensive review of Crawley's Core Strategy and Town Centre SPDs, together with information gathered from a

2. 'Context' - Grosvenor's Proposals

2.1 This section of the report provides a brief summary of Grosvenor's proposals, which were developed with the Council between 2005 and 2008. Grosvenor was selected as Crawley Borough Council's preferred development partner in 2005. DTZ has had access to the masterplanning drawings, schedule of areas and some earlier financial appraisal summary documents from which this information has been drawn.

Figure 2.1: TCN Core Strategy Plan

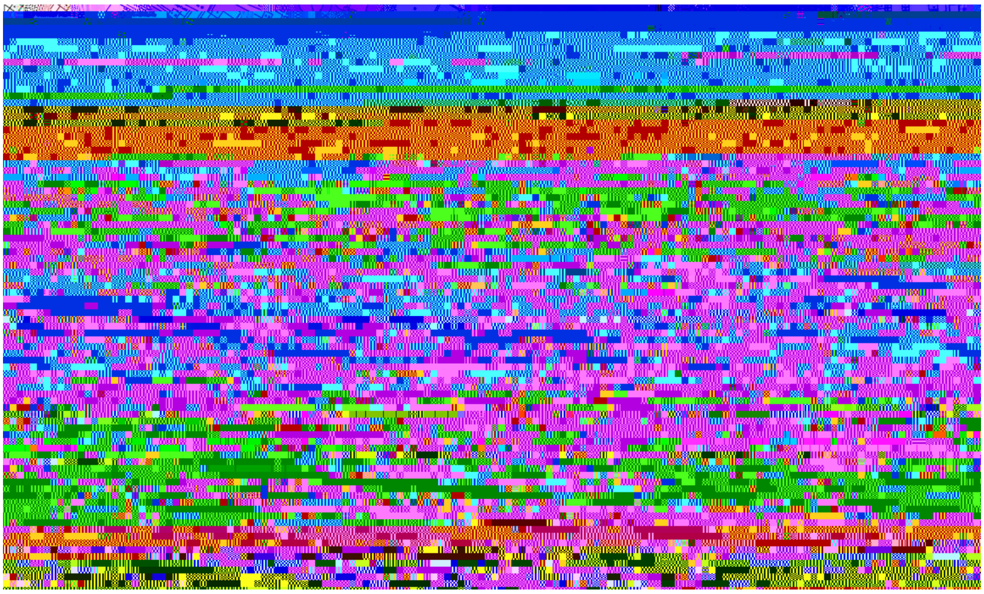
Table 2.1 – TCN 2008 Scheme

	Areas (sq m) or no. of units
	Grosvenor Aug 2008
Department Store (sq m)	24,610
Variety Store (sq m)	12,612
No of Shop Units (units)	69
Area of Shop Units (sq m)	28,766
No of Medium Shop Units (units)	7
Area of Medium Shop Units (sq m)	17,360
No of A3 Restaurants (units)	26
Area of A3 Restaurants (sq m)	16,707
Cinema (sq m)	4,049
Town Hall (sq m)	7,837
Primary Care Trust (sq m)	4,696
Shop Mobility (sq m)	160
Management Suite (sq m)	250
Car Parking Spaces (cps)	290
No of Residential Units (units)	760

The August 2008 Grosvenor scheme

2.3 In August 2008 Option '5Ea Revision G' for the TCN scheme, shown in Figure 2.2 below, was presented to the Council by Grosvenor, covering the majority of the redline area on the Core Strategy Plan for TCN. This was generally supported by the Council and was linked to the (unsigned) Development Agreement.

Figure 2.2 Masterplan Option '5Ea revision G' August 2008



which would cancel out that assumed in Crawley. The Scenario 2 forecasts also allow for some impact on comparison goods sales in the non-central retail warehouses and food superstores in Crawley. The Scenario 2 forecast (which allows for the increased TC market shares and reduced out-of-centre market shares) shows there will still be capacity for a small amount of non-central

5. Possible Sites for the Retail Led Schemes

5.1 In this section we analyse a number of alternative options for delivering the Council's retail led regeneration aspirations for Crawley Town Centre, with the intention of being able to identify the most appropriate strategy for delivering new development in the town centre. The options that are tested within this section can best be described as:

- Option 1 – Continuing with the current Town Centre North scheme;
- Option 2 – Develop the overall TCN concept in phases, including a core retail element;
- Option 3 – A new scheme in Town Centre East;
- Option 4 – A new scheme in Town Centre West; and
- Option 5 – An Asset management and piecemeal approach to town centre development.

5.2 To inform and guide this analysis we have given due consideration to a number of criteria which stem from our understanding of the Council's ongoing priorities and commentary is provided in the right hand side of the assessment tables with a summary of the respective strengths, weaknesses and suitability of the option provided thereafter. It should be noted that the following analysis has been

5.6 An analysis of how this option responds to the key development and planning considerations is provided in Table 5.1 below:

Table 5.1: Option 1 Analysis

Consideration	Yes/No/ Maybe	Comment
Step Change	**Y**	If implemented as envisaged by the Core Strategy and TCN SPD, the resultant scheme would deliver the desired step change and successfully elevate Crawley's profile as a major sub-regional centre.
Environment	**Y**	This option would substantially improve the quality of the environment through the comprehensive regeneration of the town centre's northern quadrant, and flow on benefits to the rest of the town centre via strong direct pedestrian links.
Retail Quality		

- Provides other land uses
- Consistent with adopted plan policy

- Exceeds forecast retail capacity

5.8 **Synopsis:**

Figure 5.2: Option 2 Plan – Core Retail element of the overall revised TCN concept

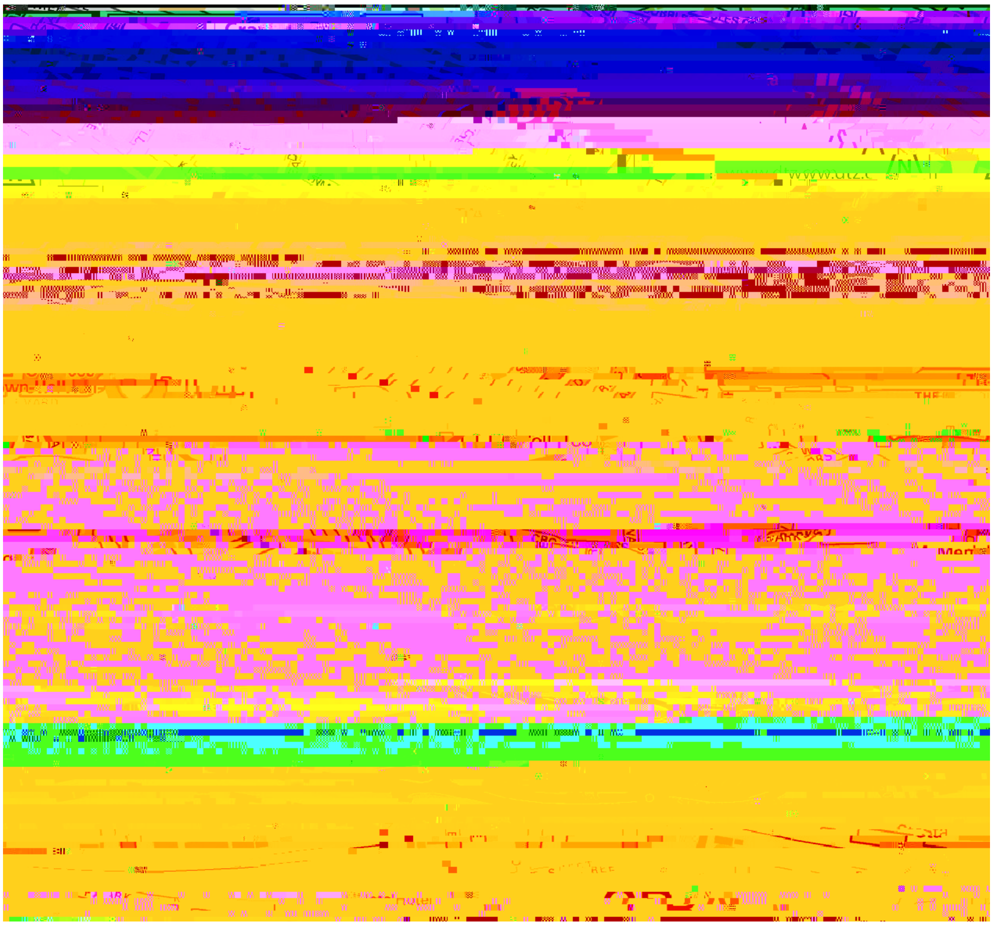
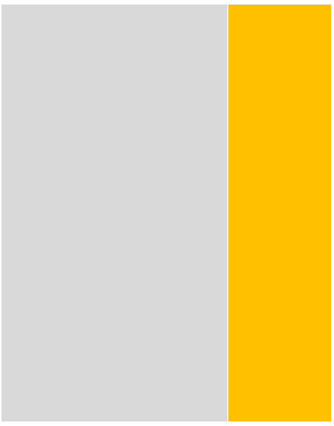


Table 5.2: Option 2 Analysis

Consideration	Yes/ No/ May be	Comment
Step Change	**Y**	It is considered that a high quality retail element 47947(t1)27.93(S 0 1 258 h)-0.30004 -22233(t)p)-59.1581p)f59h1581f6tu6.32596c)--4.77682(h)1.319687(h1)26T93Td2[1)3

		would deliver a range of benefits to the rest of the town centre.
Retail Quality	**Y**	An initial retail element incorporating the quantum of retail proposed would provide a substantial improvement in both the quantity and quality of the town centre's retail offer, including a new department store anchor and prime retailing. If designed correctly this element would also enhance the town centre retail network.
Retail Capacity	**Y**	Based on the findings of our Retail Capacity and Impact Study there would be sufficient capacity to support a step change element comprising 50,400 sq m net by 2021 with it being implemented and operational by 2018 (see timescales in section 11 below) plus 2-3 years for scheme to reach trading maturity is considered to be a realistic target.
Other land uses	[redacted]	Through a re-design and 'value engineering' exercise of the current TCN scheme, it is likely that some aspects considered to be a 'cost' will be removed from the core retail element. This may include land uses such as housing, office floorspace, a new Town Hall and the proposed PCT. Whilst this is the case it would still be possible to deliver some of these as part of the wider TCN allocation through phased developmehdh9(t)-4T Q 1310 4847.6h9(t)-4T f 1314 4847.67 h9



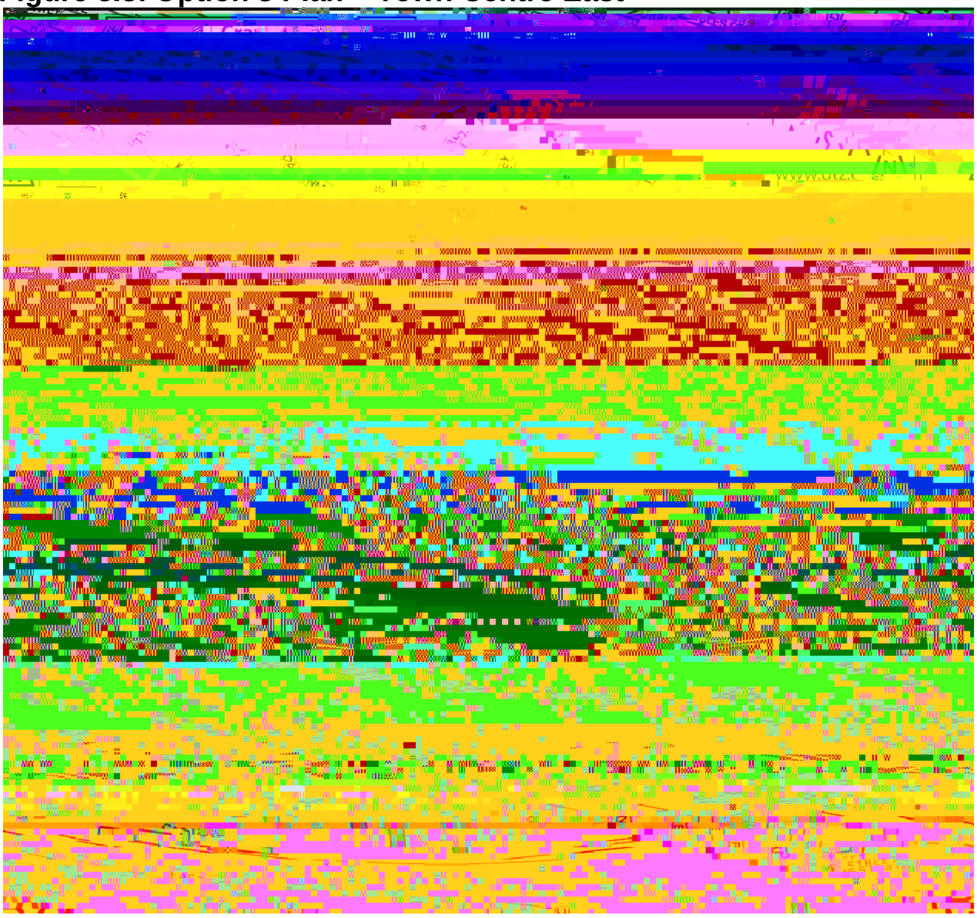
element of the overall revised TCN concept would be sufficient to deliver a step change and raise Crawley Town Centre's profile as a major sub-regional centre. A retail element of this magnitude would be department store anchored and would provide a substantial uplift in both the quantity and quality of Crawley's retail offer. The site's proximity also supports strong links to the existing primary shopping area and if designed correctly, would deliver major improvements to the physical environment through direct intervention and wider town centre regenerative benefits.

5.14 Through the 'value engineering' exercise it is likely that the current comprehensive scheme would be segmented into various phases and uses, for example de-coupling of the retail and residential components. Whilst this is the case it would still be possible to deliver these as separate but linked phases, which when combined together would deliver the TCN allocation.

5.15 Importantly through this comprehensive 'value engineering' process the resultant retail element of the overall revised TCN concept would represent more viable and

i

Figure 5.3: Option 3 Plan – Town Centre East



5.18 Pursuit of this option would require the conception of an entirely new scheme, underpinned by extensive new background, technical and evidential analysisiii63895(i)4.972335(a

Table 5.3: Option 3 Analysis

Consideration	Yes/No/ Maybe	Comment
Step Change	**M**	A scheme of a scale consistent with forecast retail capacity has the potential to deliver a step change to the town centre. However the site is divorced from the existing town centre core which would therefore severely limit the scheme's ability to

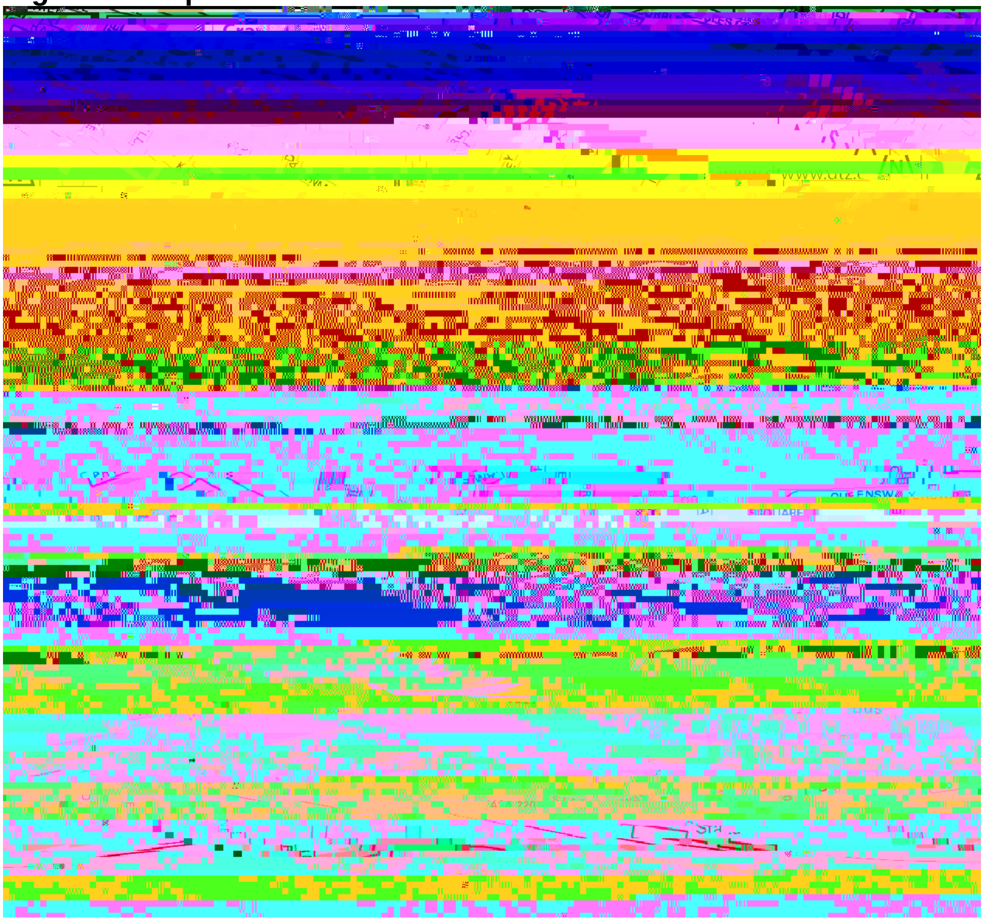
allocation. P

core and this would significantly limit the scheme's ability to successfully integrate with the established retail network and deliver wider regenerative benefits to the town centre. Moreover, we doubt key retailers would commit to it.

5.22 In plan policy terms, this option contradicts the policies of the adopted Core Strategy and Town Centre North SPD, and is entirely inconsistent with the underlining planning principles and evidence base that have informed the Council's decision making to date. Pursuit of this option would therefore require a comprehensive review of the LDF, which in itself has the potential to undermine any future application on the basis that the current TCN site is a more sequentially preferable and appropriate alternative for a comprehensive retail-led town centre expansion.

5.23 From a viability and deliverability viewpoint land assembly will be extremely expensive and complex, and the success of retail in this location will be dependent on a significant change in the retailing dynamics of the town centre to pull footfall to the east. Retail values in this location are untest

Figure 5.4: Option 4 Plan – Town Centre West



5.26 As the case with Option 3, this option would also require conception of an entirely new scheme, underpinned by extensive background, technical and evidential analysis to understand the intricacies and challenges of such an approach, and also to develop an appreciation of the potential effects (positive and negative) on delivering such a major extension to the town centre in this location.

5.27 An analysis of how Option 4 responds to key development and planning considerations is provided in Table 5.4 below:

Table 5.4: Option 4 Analysis

Consideration	Yes/No/ Maybe	Comment
Step Change	**M**	The size of the scheme capable of being delivered in this location is somewhat limited by the extent and availability of land between High Street and the existing Primary Shopping Area, and is also constrained by the town centre's High Street Conservation Area. While a scheme in this location would undoubtedly deliver a major improvement to the town centre it is questionable whether this would be significant enough to achieve the desired step change and raise Crawley's profile to that of the major sub-regional centre.
Environment	**M**	A scheme in this location could link in well with the existing Primary Shopping Area, could significantly enhance the environment in this area, and provide a much needed lift to the town centre . The magnitude of the positive benefits to the town centre's wider environment would however be limited by the amount of land available for such a scheme in this location.
Retail Quality and Quantity	**M**	This option would provide an improvement in both the quantity and quality of the town centre's retail offer and could link in well with the existing PSA. The area's spatial constraints and existing retail function would however limit the amount of new retail floorspace able to be achieved under this option, and it is questionable as to whether there would be sufficient space to deliver a department anchor store in this location.
Retail Capacity	**M**	Assuming this approach would struggle to achieve the desired step change, based on our Scenario 1 findings of our Retail Capacity and Impact Study (2010) there would only be sufficient capacity to support a scheme comprising circa 27,200 sq m net by 2021, rising to 38,500 sq m net by 2026.
Other Land Uses	**N**	Given the spatial constraints associated with this option, we consider there is limited capacity to provide other town centre uses alongside new retail floorspace. Other uses would therefore need to be delivered independently though separate development proposals.
Policy	**N**	Area is within Primary Shopping Area. However, planning policy for TCN would need to be fundamentally changed. Core Strategy town centre polices and the TCN SPD would need to be re

constraints, the site's existing retail uses, its partial inclusion in the conservation area and potential loss of listed buildings.

5.30 In plan policy terms, although this site is within the Primary Shopping Area, this option contradicts the adopted Core Strategy Policy TC1 and Town Centre North SPD, and is inconsistent with the underlining planning principles and evidence base that have informed the Council's decision making to date. Pursuit of this option would therefore require a comprehensive review of the LDF, which in itself has the potential to undermine any future application given the Council has previously demonstrated that TCN is the most appropriate location for a major retail-led expansion.

5.31 From a viability and deliverability point of view, land within this area would be

Option 5 – Piecemeal and Asset Management Approach

5.35 Option 5 is to pursue the future regeneration

		would significantly limit the ability of this option to provide the major improvement in the quality and quantity of the town centre's retail offer.
Retail Capacity	**Y**	Assuming that this approach would struggle to achieve the desired step change, based on our Scenario 1 findings of our Retail Capacity and Impact Study (2010), there would only be sufficient capacity to support a scheme comprising circa 27,200 sq m net by 2021, rising to 38,500 sq m net by 2026.
Other Land Uses	**N**	The piecemeal approach adopted under this option would be unlikely to be able to support the delivery of significant new housing and other town centre facilities. The Council would therefore need to pursue the delivery of other land uses independently in the town centre.
Policy	**N**	Planning Policy would need to be cha0.6134(1)1.4422(0)1.4422())

5.38 A summary of the strengths and weaknesses of this option is provided below:

Strengths	Weaknesses
• Smaller scale schemes likely to be viable and deliverable • Could improve specific areas of the town centre • May come forward earlier	• Won't achieve step change therefore likely to hinder the demand from some key retailers • Reduced retail capacity on the basis of a 'non-step' change scheme • Won't deliver major improvements to retail offer • Limited ability to deliver wider town centre improvements (e.g. environmental) • Inconsistent with adopted plan policy • Other land uses unlikely to be delivered until later in plan period

5.39 Synopsis: Under this option selecting the 'right' sites for promotion would be vital to delivering maximum change to the centre. Sites would need to be considered on the basis of their potential to maximise regenerative benefits, and proposals for these sites would need to be designed so they are complementary, as opposed to disparate schemes directly competing and undermining one other.

5.40 This approach would be consistent with the planning strategy set out in the Town Centre Wide SPD which guides and co-ordinates future development proposals for opportunity sites outside Town Centre North.

5.41 Even if the above could be achieved this option would not deliver the desired step change, both in terms of the town centre's retail offer and physical environment. A series of individual proposals delivered by unrelat

Other Alternative Options

5.43 In addition to the above primary options for delivering new development in the town centre, we consider there are a number of other alternative 'lesser' options available to the Council.

5.44 The first is to undertake a major extension of County Mall shopping centre. As the main shopping centre, such a development would represent a natural extension of the existing Primary Shopping Area. An initial review of the site suggests County Mall is somewhat restricted in terms of opportunities to extend, and this would potentially have major implications on the quantum of new retail floorspace deliverable by such a development. The concept of a more limited County Mall extension is discussed in further detail in section 7 of this report.

5.45 The second alternative is to undertake a new town centre scheme using land predominantly within The Boulevard. Prima facie this option appears to represent a viable alternative. However, more in depth consideration indicates that such an approach would still incur the assembly costs for land south of the Boulevard without realising the benefits of higher quality development and an associated uplift in values. The new prime retail is likely to achieve the highest rents in terms of zone A by being positioned within a comprehensive major new retail scheme with new prime retail facing new prime retail and not facing the existing poor quality secondary retail units located on the south side of the Boulevard. Given this area is an untested retail location, we also feel that a developer would struggle to secure pre-lets on a scheme with compromised connections to the existing Primary Shopping Area.

5.46 In contrast to all the previously mentioned options and alternatives, the Council could adopt a more reactive approach to the town centre's regeneration by waiting for proposals to come forward from developers and assessing each scheme independently on its merits. This approach would, in theory, be less resource intensive and would essentially be letting the market determine where and when new development should take place. However, such an approach would have substantial risks as without an up to date Development Plan and town centre strategy, the Council may be bombarded by proposals for 'out-of-centre' development seeking to capitalise on identified retail capacity and a lack of clear direction for the town centre. Reacting to such proposals would be very resource intensive – negating any perceived benefit from that aspect. If permitted, out of

5.50 While Option 2 is the preferred approach for delivering a major retail led expansion of the town centre, we recognise that this approach will not provide the major improvements to the town centre until 2016 at best. In light of the Council's desire to see more immediate change, it is clear that an interim strategy needs to be developed that will help improve the town centre in the short term. With this in mind, we consider that selective implementation of Option 5 would assist with improving the town centre while the longer term strategy under Option 2 is pursued. Indeed, the redevelopment and refurbishment of smaller strategic town centre sites would help enhance the quality of the town centre in key locations, and through associated S106 contributions the Council will also be able to deliver necessary public realm improvements which enhance the town centre environment. Importantly, such an approach would also ensure the existing town centre is in a healthy position to compete and integrate with the new town centre scheme once delivered.

6. Building blocks to a revised TCN Retail Core

6.1 In this section we have developed an initial series of building blocks based on the Council's retail development aspirations, within the context of the changing development and retail markets and Crawley's up to date retail capacity predictions. We set out below a series of core building blocks to base our initial viability assessment on to help to guide the Council towards a deliverable scheme.

Department Store

6.2 The John Lewis Partnership (JLP) still has a requirement for Crawley town centre. JLP acknowledge that the market place is changing and the development pipeline is contracting, and have therefore been forward thinking in delivering new formats such as John Lewis At Home, a format showcasing high value homeware and electrical goods.

6.3 JLP acknowledge that their competitors have higher coverage in the UK and that there are growth opportunities for their business in smaller-format stores, giving their customers convenient access to their stores. The challenge for JLP will be in delivering new stores within the existing developme

Shop Units (SUs)

6.13 The focus on mid range fashion to complement a

Cinema

6.18 Cinema operators have also witnessed their pipeline dwindle, and as such are being more competitive in the level of rent they are willing to pay to secure space in a scheme. The main reason behind this is that private equity owners behind the operators are generally taking a longer term view and are keen to see their businesses grow and introduce new technologies and formats, for example in the cinema industry, 3D screens and sound and premium cinemas. We have maintained the cinema element therefore at 4,180 sq m. However, the inclusion of a cinema is not definitive but now more likely as a building block in schemes of this nature. The presence of a cinema increases the dwell time and improves the evening economy to encourage a robust town centre. There are currently a number of cinema operators in the market who would, in principle, be interested in Crawley.

Shop Mobility

6.19 The assumption that a 120 sq m shop mobility unit will be incorporated is based on a 25% reduction in line with the general reduction in scale of the combined building blocks outlined above in comparison to the Grosvenor 2008 proposals.

Management Suite

6.20 The assumption that a 185 sq m management suite will still be incorporated is based on a 25% reduction in line with the general reduction in scale of the combined building blocks outlined above in comparison to the Grosvenor 2008 proposals.

Car Parking spaces

6.21 From current experience many town centre retail led schemes are under commercial pressure from retailers to achieve higher parking ratios. This issue will need to be considered in the core building blocks for the Crawley town centre scheme and could be linked to a revised parking strategy for the wider town centre.

6.22 Opportunities should be considered to focus the parking in areas convenient to shoppers which potentially may allow for the redevelopment of underperforming surface car parks in public ownership for high value uses whilst maintaining the due to reduced flexibility and the current reduced viability of the retail and residential elements.

6.27 A major town centre retail scheme therefore that decouples construction of these elements but has them incorporated within the wider mix of uses as later phases on adjoining sites is expected to significantly improve the deliverability of the main retail led element of the scheme.

7. Interim Town Centre Strategy

7.1 Once delivered TCN, if designed appropriately, will achieve the desired step change and act as the catalyst for the town centre's wider regeneration. This step change is however unlikely to be delivered until at least 2017, as set out in section 10 below, given the current economic climate and time required preparing and implementing a new scheme.

7.2 There is a strong, understandable local desire to see change in the town centre sooner rather than later. This is particularly the case given delays to the current TCN scheme. To maintain the town centre's vitality and viability and give a positive message to the local community it is therefore important that an interim strategy is produced in the mean time that will help deliver change over the short-medium term.

7.3 Equally important is the need to achieve a step change which will help elevate Crawley's status as the major sub-regional centre south of London. The interim strategy will therefore need to focus on delivering tangible positive improvements to the town centre in the short to medium term, whilst not jeopardising the future delivery and viability of a revised major retail-led scheme north of the town centre.

7.4 With this in mind, we consider the interim strategy should focus on delivering quick wins aimed at improving the quality, image and perception of the town centre, and which provide a platform for TCN proposals to come forward at a later stage.

7.8 It is considered that the Sussex House foodstore based scheme is not directly in competition with the core retail led TCN scheme (which is to be a high quality comparison based “step change” sub-regional scheme),although conditions would be required limiting the range of goods to primarily convenience based.

Telford Place

7.9 Telford Place has a small foodstore consented as part of a mixed use scheme and interest has been expressed in the provision of a larger foodstore. We have assumed that this would mean at least an additional 1,000 sq m to the 893 sq m net sales space already granted for a foodstore.

7.10 Whilst the principle of a food store is reflected in development plan policy, it is arguable that the SPD and Development Brief did not envisage a store of the size an operator might now want. The site is in the town centre, but in PPS4 terms at best edge of centre - arguably it would act as out of centre. The impact of the scale of the proposed store on the proposals in the SPD and Development Brief, and the overall town centre regeneration strategy and TCN, would need to be carefully considered in assessing the application.

7.11 Like Sussex House a scheme at Telford Place could be seen as a good “early win” for the town centre. Taking into account existing commitments, there is very little forecast capacity for convenience goods going forward to 2016. It is therefore important that the Council seeks to prioritise proposals which most meet planning policy and regeneration objectives and strongly resist those that do not. In this regard, we consider there is no compelling planning or regeneration arguments for consenting convenience schemes on sites outside the town centre.

County Mall Extension and/or refurbishment

7.12 County Mall is the town centre’s existing main retail centre and the only enclosed mall in the town centre at present. Originally constructed in 1974

Public Realm Improvements

7.14 DTZ recommends that a public realm strategy should be developed for the town centre, identifying key priorities for improvements and providing a delivery and implementation programme to guide future works. The strategy should focus on existing prime shopping areas but also look to improve secondary areas where possible. Funding for any public realm improvements could potentially be drawn from the above interim strategy projects through Section 106. A public realm strategy could be used as a tool to both quantify and justify these Section 106 payments.

7.15 In summary, there are 3 current retail opportunities in the Town Centre; Sussex House, Telford Place and County Mall. These proposa

8. Concept Scheme Viability Analysis

9. Delivery

Delivery Structure

9.1 The fundamental market changes over the last 3 years have forced the development industry to consider different approaches to delivering major town centre schemes. In contrast to the pre-downturn era, in general developers are no longer prepared to take up all the upfront risk.

9.2 Although we believe that the core building blocks for a major retail led development in Crawley, outlined in section 6 of this report, are now at a more deliverable level, we are also of the view that the Council should still consider innovative ways of working with developers to enable the project to move forward and gain as many public benefits from the scheme as possible.

9.3 Considering the current context of public sector finances, there is a parallel pressure on the UK Government and the Council for a reduction in spending and the private sector to lead on redevelopment. Finding some middle ground between developers and the public sector will be crucial to optimise the delivery of public benefits to Crawley town centre.

9.4 Currently many developers are struggling to find funding due to the high level of risk perceived by banks and their reluctance to lend. A key risk for the core retail element of the project moving forward is that, although we believe it is now of a deliverable scale and could achieve funding, it is possible that funding may still be expensive. The more finance costs can be reduced, the greater the likelihood that the scheme can be viable.

9.5 In terms of 'grant' funding, we consider that the following sources could assist in improving the viability of the core scheme, increas

Type of funding	Sources

A marketing and awareness raising process should be undertaken, led by the Council, to raise private sector interest in investing in the area.

Funding Mechanisms

9.8 Following the economic downturn and the withdrawal of private sector funding Central and Local government organisations have been looking to use publicly owned assets to leverage in private funding. Various models have been developed such as LABV's whereby Councils provide land in return for developers providing finance and development management skills, with both parties sharing in the long-term profits.

9.9 We summarise a few of the key alternative Public Private delivery mechanisms currently being considered by Local Authorities acr

Tax Increment Financing (TIFs)

9.15 The Local Government Resource Review (launched current Government proposals. The Council has already committed to use capital reserves to support the delivery of Town Centre North. It is almost certain that this would be less expensive than prudential borrowing.

9.25 The recent Comprehensive Spending Review and resulting cut in expenditure has focused Government's strategy firmly on reducing the national deficit and as such the public sector finds itself in a position of having to do more with less.

Planning Issues

9.26 The policy context for the development of TCN is clearly set out in the Core Strategy. Policy TC1 identifies TCN for a major mixed-use, retail-led development in the region of 50,000 sq m net gain of comparison floorspace, an appropriate range and quantity of high quality offices (including a new Town Hall), about 800 residential units, and a range of leisure, community and other uses.

9.27 However, it must be open to the Council to determine a planning application for a core retail element which would form part of the overall revised TCN concept within this policy context. When the Council considers any smaller application, it can take economic and viability circumstances into account as material considerations. If it is persuaded that such material considerations outweigh the full provisions of policy then it would be appropriate for them to grant planning permission.

9.28 It could be argued that the Sussex House site is the first phase of the development with the main retail element becoming phase 2. Housing to the north could be a separate phase. This would also fit with the policy context.

9.29 The Council could pursue a parallel strategy by reviewing the relevant policy so that it becomes adopted before planning permission is granted. Granting permission and reviewing policy need not be mutually exclusive – the Council could review the policy taking into account changing circumstances and/or granting a permission in broad compliance with the existing policy but taking into account material circumstances prevailing at the time of the decision.

9.30 We emphasise that at this stage DTZ are strongly of the opinion that the Borough Council, West Sussex County Council and the HCA need to initially decide on clear goals in relation to their aspirations for the town centre. These include "planning" aspirations but also financial and land ownership i

10. Key conclusions and next steps

10.1 DTZ's updated retail capacity analysis supports the Council's continued desire to allocate part of Crawley town centre for a major retail led expansion of its comparison shopping offer.

10.5 Ongoing retail demand for Crawley is significant. Moreover, Crawley has a real opportunity to become the pre-eminent retail location for the area immediately South of London, but only provided that it now moves redevelopment proposals forward proactively, and on the right basis.

10.6 Whilst the revised retail element of TCN will need to reduce to reflect revised market factors, our proposed new concept for this element still has the ability to create the desired retail step change.

10.7 There are various existing retail proposals in the town centre; at its edge, and out of town. We have outlined an approach that we consider would provide the best interim position to sustain the town centre, whilst in parallel giving most comfort that the medium to long term delivery of the retail step change is not impaired. Indeed, this can be assisted.

10.8 What the Council wants from the TCN area – both in terms of revised policy requirements, and financially, for its associated property and occupational needs – will have a significant impact on whether a revised project will ultimately be viable and deliverable. The same applies for the Council's two key Public Sector Partners – the HCA and the County Council. Clarity on these base 'inputs and outputs' at