



Retail Development in Historic Areas



FOREWORD

There has always been a direct relationship between the cultural and physical character of our towns and cities, and the commercial activity they accommodate.

The nature of trading today, influenced by ease of transport (both goods and customers), telecommunications, and the growth of large trading and property investment companies, is very different from that which shaped the layout and character of our historic shopping centres.

Through the later decades of the 20th Century, the growth in large-scale out-of-town retailing reduced activity in town centres, putting at risk the viability of some of our most characterful historic centres, and the mix of shopping provided for local people. PPG6/PPS6 has helped to slow this trend. We are now seeing substantial reinvestment in retail development, often as part of mixed use developments, in our historic town centres.

This can bring re-investment in the fabric of our town centres, including buildings and public realm, and greater footfall to support existing retailers. It may also, however, bring increasing homogeneity of town centres that all accommodate the same national and international names; and the loss of historic buildings and street layouts to accommodate larger, simpler footprints and efficient servicing.

This publication presents case studies that demonstrate how new retail development can be provided successfully and profitably while protecting the historic character of its setting, and introducing buildings that enhance this character.

None of the case study schemes are 100 percent successful. But they demonstrate what can be achieved when mutual understanding between the partners helps prioritise what is most important for each location.

The historic environment - buildings and public realm - cannot survive without continual investment in maintenance and repair. Keeping buildings in use generates the income necessary for this investment. An attractive and distinctive shopping environment will be increasingly important to attracting customers with increasing retail choice and discretion.

This publication points out some of the ways in which property investors, retail operators, and local planning authorities can work together to retain and strengthen shopping centres of great character that reinforce the links between their historic function and their future prosperity.

Steven Bee
Director of Planning and Development
English Heritage

Front cover: Duke of York Square, London
Opposite page: Bold Street, Liverpool
Grainger Town, Newcastle



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A Public spaces in the Bold Street area of Liverpool now support a wide range of social and leisure activities as well as a thriving retail function
 B Duke of York Square, London

Shops and retailing form the lifeblood of many historic areas, providing vitality, vibrancy and an essential economic base. The retail world is fast moving and highly competitive, and the challenge is accommodating larger shops and complex retail developments in historic areas in a way that enhances their competitiveness and protects their historic character. It is vital to address this in an imaginative and proactive way.

INTRODUCTION

This report pools the experience of English Heritage and the retail development industry, drawing on recent advice from ODPM, CABE, the English Historic Towns Forum (EHTF) and others. Its purpose is to set out guidelines for achieving high quality new retail development in historic areas.

The report includes a series of case studies which illustrate how the expectations of the developer, the trader and the customer can be accommodated while preserving historic places and enhancing their surroundings. The case studies show how retail development can be successfully integrated within an historic context and add to economic prosperity. In addition, the report provides guidelines to assist local authorities and the development sector to achieve creative, robust solutions for new retail development in historic areas.



The structure of this report includes an overview of the challenge facing retail development in historic areas, an outline of the importance of retailing in historic areas, trends in retailing, a series of case studies and guidance for achieving high quality new retail development within an historic context.

The report was developed over an eight month period by English Heritage, Urban Practitioners and CB Richard Ellis through a process which included workshops with government, the development industry and design specialists. The interaction between the historic buildings and development sectors has been a major strength in the development of these guidelines. In addition, the guidelines provide an up-to-date position statement in the context of PPS6.

The policy context for this report is provided by Planning Policy Statement PPS6: *Planning for Town Centres* (ODPM, 2005), which sets out the government's objective to promote the vitality and viability of town centres by planning for the growth and development of existing centres and encouraging a wide range of services in an attractive environment, accessible to all.

Other government objectives, set out in PPS6, to be taken account of include:

- enhancing consumer choice by providing a range of shopping, leisure and local services which allow genuine choice to meet the needs of the entire community and particularly socially excluded groups;

- supporting efficient, competitive and innovative retail, leisure and tourism sectors, with improving productivity;
- improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport; and
- promoting high quality and inclusive design, improving the quality of the public realm and open spaces, protecting and enhancing the architectural and historic interest of centres, providing a sense of place and a focus for the community and for civic activity and ensuring that town centres provide an attractive, accessible and safe environment for businesses, shoppers and residents.

Planning Policy Guidance Note PPG15: *Planning and the Historic Environment* sets out guidance for the management of historic buildings, conservation areas and other elements of the historic environment. Its companion document PPG16: *Archaeology and Planning* sets out the government's policy on archaeological remains and how they can be preserved or recorded.

It is hoped that this document will be helpful to planning authorities and developers in preparing and considering new retail schemes in historic areas.

A Duke of York Square, London - enjoying the shopping experience

B Lancashire Court/Avery Row, London W1

In the early 1990s the yards and passageways between Brook Street and Bond Street in Mayfair were earmarked for redevelopment. Planning permission for demolition was granted, but the developers finally opted for a combination of refurbishment and judicious infill. The area is now a successful mix of high quality shops, restaurants and a museum, all supporting a lively street scene.



“Maintaining the economic prosperity of historic towns is vital to their future sustainability, but they must acknowledge that if they do not successfully incorporate planning for modern retail requirements into their existing fabric that their competitiveness will decline.”

Andrew Ogg, British Council for Shopping Centres, February 2005

THE IMPORTANCE OF RETAILING IN HISTORIC AREAS

The retail sector performs an important role in many historic centres. By their very nature, many larger historic centres, in particular cities such as York, Oxford, Canterbury and Bath, act as a focal point for the leisure and tourist industries. Visitors to historic centres can enjoy the opportunity to shop and linger in an attractive historic environment, and the existence of strong retail and leisure facilities provides an important additional reason for people to visit historic centres.

The historic nature of some centres acts as part of their retail brand and influences the way in which they are marketed. For example, the retail experience in historic centres often forms part of a wider day-out or functions as one of a number of linked attractions.

Retailing can also fulfil an important role in many smaller historic centres such as smaller cities and market towns. In historic market towns, retailing may primarily perform a convenience function, serving the local population's food retailing and wider day-to-day shopping needs.

Some forms of retailing - for example, music, restaurants, home interiors, books or cafés and bars - may naturally fit quite well within an historic environment, allowing certain centres to adopt more of a specialist retailing role and provide important life-blood to centres which would otherwise suffer from competitive pressures.

The importance of trading in historic town centres is key to their durability. In addition, retailing makes a key contribution to the culture and economy of towns today, as well as allowing for the continued viability of historic buildings through their adaptation for new uses.

CURRENT AND POTENTIAL FUTURE TRENDS IN RETAILING

There are a number of current and emerging trends in the retail sector which have been identified by CB Richard Ellis and can be summarised as follows:

- **The trend towards larger unit sizes**
Retailers' size requirements for new stores have increased significantly in recent years. For example, fashion and other comparison retailers who in the late 1980s/early 1990s might have sought shop units of approximately 460 sq m (5,000 sq ft) are now seeking units of 930 sq m -1,860 sq m (approximately 10,000 sq ft-20,000 sq ft) or more.

Larger store formats are less flexible and more challenging to accommodate within existing historic buildings. Similarly, such units require careful design to be accommodated within new developments in order to be in keeping with their historic neighbours.
- **The increasing tendency towards mixed-use schemes**
In recent years, there has been active promotion of mixed use developments, as reflected in the government's planning policy in PPS6. Acceptance of mixed-use investments by institutions has grown. There has been a realisation that the incorporation of leisure uses as part of a retail development can increase dwell times within shopping centres and town centres, and provide more reason for customers to visit. In addition, the inclusion of residential and leisure elements can increase activity outside shopping hours, which can increase perceptions of safety.

This trend may have particular benefits for historic locations, as it may allow for greater flexibility with regard to the uses which can be accommodated on the upper storeys of historic buildings. Such mixed-use development may also mirror the historic pattern of land use more closely, as in the past, town and city centres were rarely dominated by a single land use.

There may, however, also be specific challenges arising from such mixed-use schemes, including the large floorplates and blank walls associated with certain leisure uses. It may also be difficult to accommodate management and servicing arrangements associated with the incorporation of a number of different uses within a single building or block.

The trend towards the incorporation of a greater leisure element within retail developments may also present an attractive opportunity for historic centres because many such areas already contain a wealth of additional visitor attractions which help to draw in customers. Historic locations tend to be interesting locations to visit and explore in their own right.

- **A move away from covered shopping centres and 'mega-schemes'**
In recent years, there has been a move away from covered shopping centres towards more open schemes which rely upon a high quality of public realm and streetscape and the creation of a number of individual development blocks rather than a monolithic structure. This move has been prompted by a number of factors, not least of which is the high cost of creating enclosed shopping centres - both in terms of the initial construction cost and also the resultant occupancy costs (for example, in terms of service charge) for prospective tenants.

Schemes with public streets rather than malls are more likely to be readily accommodated within historic centres and can enhance the historic fabric.
- **The increasing polarisation of the retail market**
Along with the trend towards larger unit sizes, there is an increasing and continuing polarisation by retailers towards larger schemes in larger centres. Research by CB Richard Ellis indicates that in 1971, the UK's 200 largest centres catered for approximately 50 percent of comparison goods sales. By 1998, they accounted for almost 75 percent of such sales. In addition, by 1998, the largest 75 centres accounted for approximately 50 percent of all comparison goods sales. Thus, there is a polarisation between a small number of large centres with high and increasing comparison goods sales, and a large number of smaller centres with comparison goods sales which are growing more slowly, or which are static or in decline.

This polarisation means that the competition faced by smaller centres, such as market towns, may be severe. The need to safeguard the historic environment is a key challenge which this guidance seeks to address in the context of the need for smaller centres to ensure that they have a viable economic future. In such instances, there may be a need for flexibility to allow for appropriate well designed new development which can help to ensure this future.

Restricting retail development to an inappropriate degree may actually starve such centres of the investment required to maintain their built environment and prejudice their ongoing economic viability. This pressure on smaller centres is further exacerbated by the way in which, despite the increasing planning restrictions on out of town centre development, many traditional high street retailers are seeking to diversify store formats and provide out of town centre facilities. In addition, some out of town centre store formats have continued to increase in size, and also to diversify the range of goods on offer, taking advantage, where possible, of ambiguous or non-existent goods conditions and installing mezzanine floors in order to increase trading floorspace.

More recently, CB Richard Ellis' National Survey of Local Shopping Patterns, updated in 2005, indicates that the largest 50 centres account for over 40 percent of the comparison goods market, and that travel distances and catchment sizes are increasing with the major food retailers taking an increasingly large share of non-food sales.

- **The advent of new technology and new forms of retailing**
Recent years have seen a dramatic rise in the use of new technology, including the internet and digital television home shopping as forms of retailing. To date, the impact of these new forms of retailing has been spread unevenly across the retail market, with certain goods types, for example, books and CDs, proving

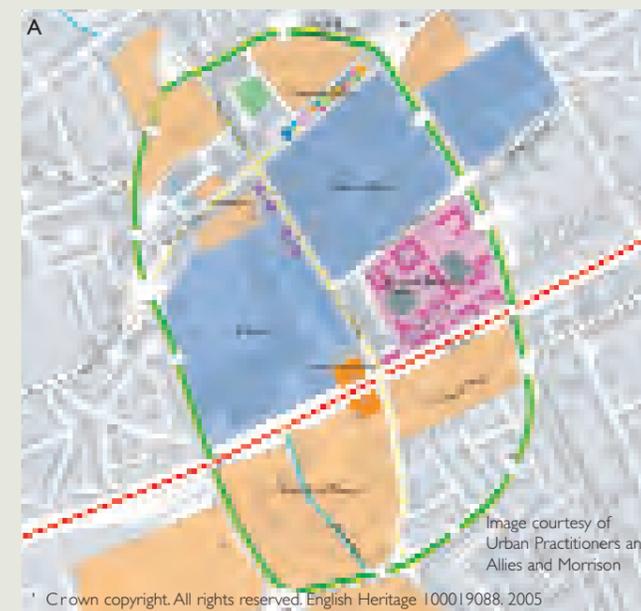


Image courtesy of Urban Practitioners and Allies and Morrison
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A New retail development should be set in the context of the historic area as a whole. In Romford, new large-scale mixed-use retail development has been introduced near the historic South Street area, while the historic market place is being similarly improved with a new retail-led scheme.

particularly popular for internet retailing. Indeed, music is increasingly being downloaded from the internet without a physical product changing hands.

Despite the rise in these new forms of retailing, high street sales continue to increase, and consequently there can be little certainty regarding the future impact of new technology. However, it seems likely that centres which offer a range of complementary, non-retail attractions will be more resilient to these changing patterns of retailing. Historic centres may be at an advantage in such a climate, because of the inherent interest and attractions which they hold for shoppers and other visitors.

Other trends

There are also a range of other relevant trends in the retail sector including the following:

- **The rise of value retailing:** There has been an increase in activity at the 'value' end of the retail market. While some retailers in this sector may provide an opportunity for smaller centres, owing to a preference for locating in lower cost locations, a number of such retailers typically require larger unit sizes, which do not always sit well in historic locations. In addition, part of the success of value formats is their ability to keep costs low, often through a relatively low quality store fit-out. This may have an implication for the readiness of such retailers to trade from historic properties which may require a higher degree of maintenance, and where planning considerations may dictate a more bespoke approach to store design and fit-out.
- **The rise of concept/interactive stores:** Some retailers have sought to develop concept stores or interactive stores in order to distinguish their offer from that of competitors. To date, such stores have typically been located only in the largest city centres, and it remains to be seen whether this trend will become more widespread.
- **Changes in service uses:** Certain service uses such as post offices and banks/building societies have been able to trade successfully from older and more historic buildings, particularly because they do not necessarily require the large display windows required by typical retail uses. However, the number of post office branches has been in steady decline, and there has also been a significant reduction in the number of bank branches. For example, between 1988 and 2000, the number of bank branches fell from approximately 17,500 to 12,000. The closure of such facilities, particularly in smaller

centres, can lead to difficulties in finding appropriate new uses for such buildings. Former banking premises can, for example, prove attractive to A3 uses, although in some centres the increasing dominance of the evening economy can present management challenges.

- **A resurgence of smaller foodstores:** Partly in response to the requirements of PPG6/PPS6, there has been a resurgence of smaller foodstores, in or on the edge of smaller centres and often as part of wider, mixed-use development schemes. These are often specialist foodstores or organic shops rather than mini-supermarkets or convenience stores.
- **The need to enhance local distinctiveness:** There is an increasing focus on the benefits of maintaining and enhancing local distinctiveness of historic areas to give them a competitive edge.

Above all, the retail sector represents a **dynamic, fast-changing and competitive environment**. The centres which are not able to adapt to new challenges and respond to the ever-increasing competitive pressures, are likely to lose trade to those centres which can. Clearly, many historic centres have the advantage of an attractive and interesting town centre environment but, on its own, this may be insufficient to ensure that they have a viable economic future in the years to come. If historic centres are starved of new investment, then it is likely that their built environment will suffer alongside their economic vitality and viability. The sensitive development of new retailing therefore is of vital importance.



A Bold Street, Liverpool

The next section sets out ten case studies which demonstrate ways in which new retail development has been introduced into historic areas.



B Bold Street, Liverpool



The case study locations are:

- 1 N1 Islington, London
- 2 Whitefriars, Canterbury
- 3 Chapelfield, Norwich
- 4 Grainger Town, Newcastle upon Tyne
- 5 Bold Street, Liverpool
- 6 Duke of York Square, London
- 7 Former County Hotel, Taunton
- 8 Vicar Lane, Chesterfield
- 9 Lion and Lamb Yard, Farnham
- 10 Tesco, Ludlow, Shropshire

CASE STUDIES

N1 ISLINGTON, LONDON

A skillful mixing of retail and leisure uses that supports cultural activities and urban vitality, including the evening economy, in an open street based scheme

N1 Islington is a combined retail and leisure development undertaken by Centros Miller. It is situated in the historic centre of Angel, a designated Town Centre in Islington Council's Unitary Development Plan. The scheme has 16 major retailers, including Borders, Mambo, HMV, Gap and French Connection, as well as two major leisure uses, a large Vue multiplex cinema and the Carling Academy Islington, an innovative music venue.

Given its very central location, the key challenge for the N1 Islington scheme was to accommodate major retail and leisure facilities in a way which respected the historic character and appearance of the area. The site was previously occupied by car parking and industrial uses, and so there were few concerns about demolition. However, the scale and massing of neighbouring buildings along Upper Street provided a clear context for the scale of new development.

Through a striking contemporary architectural solution, N1 Islington has met these challenges by providing a new heart for the area, which is active during the day and evening. The scheme provides a new public space, animated by public art including Wolfgang and Heron's Angel Wings sculpture, which reinforces local distinctiveness. An unrestricted pedestrian access route through the development has improved the permeability of the area, giving better access to the historic Chapel Market.

During the day, the centre is a busy shopping area, making a significant contribution to the comparison goods retail offer within Angel. Furthermore, the incorporation of bars and restaurants, along with the cinema and an innovative music venue (a 300 capacity live music and club space, with a separate 250 capacity room showcasing new performers), ensures that the area remains vibrant after the shops have closed.

This new urban centre has been achieved with respect for the local built fabric. Neighbouring building heights have been adopted, and the large volumes of both the cinema and the concert venue have been largely concealed through imaginative design. In summary, the development has been sensitively inserted into an historic frontage, with the bulk of the development hidden from key view points.



A Angel Wings sculpture, Wolfgang and Heron
B N1 Islington street frontage onto Upper Street
C New public space within the N1 Islington scheme.



A Public space within the Whitefriars development
B The Whitefriars scheme viewed from Canterbury city centre

WHITEFRIARS, CANTERBURY

Re-integration of a damaged quarter into the historic city core

The centre of Canterbury is a major cathedral city that receives 4.5 million visitors each year. It is an important regional shopping centre.

The Whitefriars site covers approximately one eighth of a quadrant of the city within the medieval walls that was severely bombed in the Second World War and subsequently redeveloped in the 1950s and 1960s. The shopping precinct that resulted from this rebuilding was architecturally weak, commercially inefficient, had very poor links to its historic surroundings and was unpopular locally.

The major challenge for the Land Securities scheme, which has a floor area of 37,000 sq m (400,000 sq ft) was to re-integrate the new buildings into the historic core of Canterbury. The redevelopment was conceived well beyond its own boundaries as part of a Whitefriars 'Quarter', linking the development to the adjacent streets with a network of new pedestrian routes and public spaces. These new spaces provide 24-hour access through the scheme and contribute to remaking the urban grain of this part of the city.

The retail layout of four large stores and 30 other shops is anchored primarily by a Fenwick department store and includes Tesco, Boots, Next and Marks & Spencer. The scheme also incorporates 35 apartments, and having residents brings out-of-hours life and a degree of surveillance to the area. The development includes car parking for 528 vehicles, mostly concealed from view by buildings around the perimeter. Servicing is at basement level.

A notable aspect of the scheme was a 'continuity of trade' programme which, through careful phasing, allowed the existing retailers to continue trading throughout the construction period. Whilst this extended the construction period, which included a large archaeological excavation, it provided stability and ensured customer confidence. Public involvement and information was considered to be essential throughout the planning and construction period and a quarterly publication, 'Whitefriars Watch', was produced by the developers to communicate progress and encourage support.

The latest phase of the scheme opened in June 2005.



A Chapelfield's entrance integrated into the existing city centre shopping street



B The Chapelfield development, situated within the context of the city wall

CHAPELFIELD, NORWICH

Innovative mix of retail and residential uses to create a new city centre quarter

Chapelfield is a major mixed use scheme which opened in 2005. At the core of the development is a shopping mall comprising 90 shops and catering outlets, anchored by House of Fraser at its far end.

One of the features of this scheme is the way in which 118 residential apartments have been successfully integrated with the retail uses, yet remain physically separate structures. A mix of social and private housing wraps around much of the retail core, providing high quality single-aspect apartments, some of which overlook Chapelfield Gardens. In addition to this there are pods of housing set in landscaped gardens between the main complex and the city wall.

Integration with the traditional shopping streets nearby is achieved by forming one of the main entrances within a historic street-front plot. Another main entrance is handled with particular sensitivity, with the formation of a new civic space linked to St Stephen's churchyard.

Following the closure of the Nestlé chocolate factory in 1996, the City Council prepared a planning brief for the site. The Council actively sought to extend Norwich's retail offer, at the same time as re-integrating this extensive former industrial site into the city centre.

The team assembled by the City Council and English Heritage encouraged the developers (Lend Lease) to commission a study assessing the historical development of this sector of the city and the contribution made by the buildings on the site, with a view to preparing a written justification for demolition. This gave Lend Lease a much greater understanding of the site context and clarified which materials could be salvaged for re-use within the development.

Lengthy negotiations during the planning process included a visit from English Heritage's Urban Panel. As a direct result of this, new design approaches were introduced that have accommodated a range of other activities and helped to integrate the development with the historic city.

“Chapelfield is the successful result of a shared vision and an agreed strategy with all key stakeholder groups to achieving a quality product. With the support of English Heritage, CABE, the local authority and a range of architects and civic artists, early consultation and a masterplan approach helped to successfully integrate large scale development within a sensitive historic environment.”

**Duncan Bower, Development Director
Lend Lease, October 2005**



GRAINGER TOWN, NEWCASTLE UPON TYNE

Concentrated investment in the public realm and architectural conservation to emphasise urban quality

Newcastle upon Tyne grew rapidly after the Industrial Revolution, and the northern part of the city was substantially rebuilt in the first half of the nineteenth century. The outstanding classical townscape that resulted is on a par with the Georgian developments in Bath and Edinburgh, as well as the work of John Nash in London. Much of this was the achievement of Richard Grainger, an entrepreneur and speculative builder.

During the 1980s, the historic core entered a slow decline as the trend for out-of-town retailing grew. Upper floors were abandoned, leaving more than 100,000 sq m (1m sq ft) vacant, and there was little investment in the building fabric. The challenge faced by Newcastle City Council was to breathe new life into the area without sacrificing its historical and architectural interest.

In 1997 the City Council, supported by English Heritage and English Partnerships, began a £120 million, conservation-led regeneration programme. The key objectives were to revive the retail heart of the city, rebranded as Grainger Town, and to re-introduce housing and office uses into the vacant space. New retailing included a combination of national retailers and specialist units not represented in Newcastle. Drawing on the city centre's well established public transport network, a pedestrianisation programme combined with comprehensive public realm improvements was implemented. Detailed planning guidance was also published, including shopfront design. In addition, the central area is now intensively managed.

The result has been a sustained uplift in quality and trading performance, re-establishing the Grainger Town area as one of England's greatest civic achievements and a destination for shopping, business and urban living.

A Grey Street's outstanding composition of classical buildings is now enlivened by a mix of business, retail, restaurant and cultural activities

B Shopfronts and fascias have been designed to respect the architecture of the street



BOLD STREET, LIVERPOOL

Investment in existing buildings and enhanced public space to create a lively successful retail environment, contributing to the wider regeneration of the city

The regeneration of Bold Street in Liverpool demonstrates the influence that high quality streetscape and historic building conservation can have upon the retail environment.

Bold Street is a secondary shopping street, leading away from the retail heart of the city. The townscape is very diverse, reflecting piecemeal rebuilding after Second World War bomb damage. Many of the older buildings have been re-used for retailing, and more recently, for restaurant and leisure uses. This mix of uses, combined with the diversity of the building types and the fine urban grain, creates a very vibrant street scene. This environment has been enhanced by significant investment in the public realm which, through the use of well chosen paving materials, has transformed the appearance of the street.

Bold Street has managed to balance high quality independent retailers with national chains and to make a strong contribution to the retail offer of the city. Restaurants, cafés and bars ensure that the area has a strong evening economy.

Within Liverpool as a whole, Bold Street also provides a key link between the city's retail core and the recently regenerated Ropewalks district, and is a key element in the wider renaissance of the city. It will complement the forthcoming Paradise Street redevelopment project which, at 100,000 sq m (1.1m sq ft), will be one of the largest new retail schemes in Europe.



- A Public spaces in the Bold Street area now support a wide range of social and leisure activities as well as a thriving retail function
- B Older buildings in Bold Street have been successfully adapted to incorporate a broad mix of retail operators



DUKE OF YORK SQUARE, CHELSEA, LONDON

Skilled transformation of a former regimental headquarters and creation of a high quality public realm

The Duke of York's headquarters is a substantial complex of listed buildings, mostly of nineteenth century origin, and a former home to several army regiments. In 1999 the Ministry of Defence sold four hectares of the site adjoining the King's Road to Cadogan Estates, who were already major property owners in the area and who were committed to keeping the wider area in one ownership and under coordinated management.

The site is on the south side of the King's Road opposite the iconic Peter Jones department store on Sloane Square. Retail development was an obvious use, if the listed buildings could be adapted and good pedestrian links made with the existing shops. The Royal Borough of Kensington and Chelsea and English Heritage were closely involved from the outset, helping the project team to identify the planning and conservation opportunities.

Through a combination of refurbishment, conversion and judicious new build, the area has been given a new lease of life and for the first time is freely accessible to the public. A mix of 22 specialist shops, restaurants and flats animates the new streets. Retailers include high quality fashion stores such as Kate Kuba, Joseph and Agnes B.

Deliveries are made from the pavement, eliminating the need for service yards. Most strikingly, a public square on the King's Road offers a breathing space for shoppers and provides views southwards to Wren's Royal Hospital.



- A Public space and café culture within Duke of York Square
- B High quality contemporary architecture facing the square

“The aura of maturity with historic areas gives great potential over new purpose built ones. However, unless they are to become sterile museums, they must be given the opportunity of life. That only comes with the introduction of retail activity, whether of the day to day variety or more specialist occupiers, together with catering. Other activity, whether residential or offices, will depend on the location.”
Gerald Corbyn, Chief Executive, Cadogan, October 2005



FORMER COUNTY HOTEL, TAUNTON

Striking a balance between building preservation and contemporary retailing needs, at the heart of a historic town

The former County Hotel in Taunton demonstrates how the competing expectations of historic building conservation and contemporary retailing often have to be reconciled. This historic building, situated in the centre of Taunton, was recently redeveloped to provide retail space for Waterstone s and Marks & Spencer and now forms a key component of Taunton s retail offer. The challenge was to manage this redevelopment in a way that would provide sufficient viable trading space while maintaining a cherished town centre landmark.

The conversion of the former County Hotel building illustrates two quite different approaches to the incorporation of modern retailing space into historic buildings. The western section of the building, which includes the imposing hotel portico, is occupied by Waterstone s and has retained many of the interior features of the old hotel. This includes the former hotel 'Assembly Hall' and the original staircase. By contrast the eastern section of the building, now occupied by Marks & Spencer, has been substantially redeveloped, although the front elevation remains largely the same. This was prompted by the operator s trading needs, and in particular the requirement for a larger undivided floorplate than the historic building interior could provide. Marks & Spencer has created additional trading space by extending to the rear of the original building. The resulting block provides the necessary trading area, along with rear servicing and customer parking.



A The former County Hotel frontage onto East Street
 B The eastern wing of the former hotel
 C The scheme in context

VICAR LANE, CHESTERFIELD

Conservation-led retail development revives the heart of a historic town and sustains it

Chesterfield is Derbyshire's largest town, with a population of approximately 100,000. It has an important historic centre, famous for the twisted spire of St Mary's Church and for its open market, one of the largest in the country. Since the 1970s the Borough has been gradually transforming its town centre to compete as a sub-regional centre between the cities of Derby and Sheffield.

When Chesterfield needed more shopping floorspace and better facilities, including car parking and servicing, the early approved plans entailed the comprehensive redevelopment of the central area, replacing the Market Place and adjacent streets with a self-contained, enclosed shopping mall. This scheme eventually gave way to a conservation-led design that met operational and commercial demands whilst retaining as much of the historic fabric as possible. The scheme, The Pavements, won a Europa Nostra award in 1981.

At that date the extension of the shopping centre to the Vicar Lane area was being planned as a multi-level, cruciform plan, covered shopping development. The tough retail market of the early 1990s put paid to those proposals. In 1998 developers Centros Miller joined with Chesterfield Borough Council in formulating new proposals. In the years since the opening of The Pavements, the design of retail developments has moved away from covered malls towards creating new streets and spaces fronted by a variety of buildings containing shops.

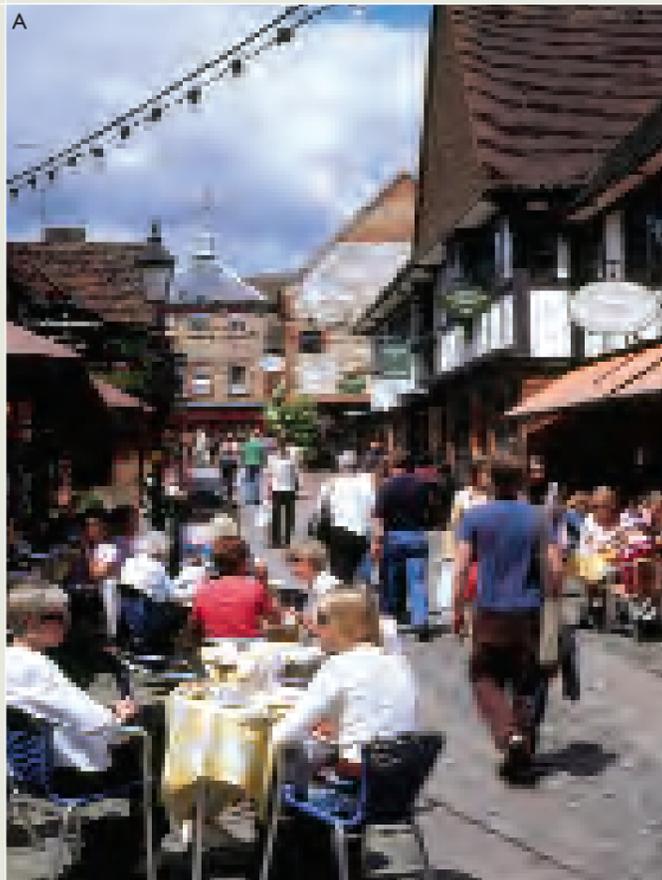
The Vicar Lane development is now a substantial 12,600 sq m (136,000 sq ft) scheme to the east of the Shambles and the Market Place, which opened in 2000. The Council used its compulsory purchase powers to assemble the site in partnership with Centros Miller as a new shopping quarter for Chesterfield, designed by Chapman Taylor architects. The new scheme fully integrates with the adjacent streets, and new streets and spaces are aligned to highlight views of historic landmarks, including the crooked spire. The steep slope of the site is exploited to allow rooftop servicing. All 30 units are let, and the development successfully complements the other town centre facilities. Immediately south of the churchyard, an open space houses a visitor information centre that acts as an entrance to the new shopping quarter, whilst a new junction on Burlington Street marks the start of Steeplegate, which winds down across the site, drawing in shoppers.



A New public space, highlighting views of historic landmarks, has been created as part of the Vicar Lane development in Chesterfield



B The Vicar Lane development is fully integrated with adjacent streets, improving pedestrian accessibility



LION AND LAMB YARD, FARNHAM

The careful positioning of a large anchor store, use of high quality materials and respect for the historic grain of the town has created an enduring and successful development

Farnham is an historic market town in Surrey, close to the Hampshire border and well within the London commuter belt. The town has a prosperous rural hinterland and is economically buoyant.

Plans for a large supermarket to the rear of West Street could have resulted in a functional box away from Farnham's other shops. Instead, skillful positioning of the supermarket now ensures that Waitrose works well as an anchor to a cluster of 25 much smaller shops in Lion and Lamb Yard, a paved passageway leading into West Street itself.

The development is a 6,600 sq m (71,000 sq ft) shopping centre, comprising the supermarket, 25 retail units and five upper floor offices, with parking for 250 cars at the rear. Deliveries are made off-street, using side roads and an entrance next to the car park.

Through a combination of infill and conversion, the development has enhanced the grain of the historic town and substantially improved the local shopping offer. Historic buildings to the rear of West Street have been put to new use, integrating seamlessly with new buildings which, whilst architecturally conservative, deploy local materials with skill and imagination. The Yard is paved in high quality natural materials and the overall organic quality is very positive.

The Lion and Lamb Yard scheme won a British Council of Shopping Centres Gold Award for a new centre. The scheme is fully let to a mix of local businesses and national 'blue chip' franchises. The buildings and public spaces are well maintained and the scheme has stood the test of time and remains popular with local shoppers since it opened to shoppers in the 1980s.



A Pedestrian access route created as part of the Lion and Lamb Yard scheme
 B Integration of Lion and Lamb Yard into the urban grain of Farnham
 C West Street entrance



TESCO SUPERMARKET, LUDLOW

Integrating a large supermarket in the heart of a historic town

Ludlow, with its castle, hilltop position and fine parish church, is one of England's most celebrated historic towns. The centre is well preserved, and most of its shops trade successfully, but until recently there had been no large supermarket to complement the specialist and small scale operators who were losing trade to nearby centres.

The challenge of accommodating a supermarket and a 180 space car park into the townscape was considerable. Planning permission was finally granted, and a new 2,787 sq m (30,000 sq ft) Tesco store opened in 2000 on the site of the former cattle market.

The project shows that with flair and ingenuity, even large floorplate retailers can be accommodated in historic small towns. After a careful study of the urban grain and topography of the town, a scheme was designed that makes a transition between the domestic scale of Corve Street and the bulk of the supermarket to the rear. As well as incorporating an innovative heating and lighting system, the large, undulating roof softens the mass of the building and responds to the contours of the hills around the town.

The scheme now acts as a magnet for trade to Ludlow which helps to re-inforce the economic vitality of the town.

A Corve Street entrance: the night time illumination enhances the crisp, stylish form of the building
 B The undulating form of the supermarket roof respects the profile of the Shropshire landscape



NEW RETAIL DEVELOPMENT IN HISTORIC AREAS

Drawing on the case studies illustrated in this document, together with the trends in retail development, guidelines for new development are set out as follows:

- 1: Planning process and consultation guidelines
- 2: Design guidelines
- 3: Guidelines for new retail development in historic buildings

These guidelines are followed by a summary of English Heritage's position and a checklist for success.

1: PLANNING PROCESS AND CONSULTATION GUIDELINES

The following guidelines have been prepared in the context of PPS12 *Local Development Frameworks*, which promotes continuous community engagement, PPS6: *Planning for Town Centres*, paragraphs 2.26 to 2.40 and the accompanying guidance note *Planning for Town Centres: Guidance on Design and Implementation Tools* (ODPM, 2005). Proposals for new retailing in historic areas will be sensitive and require a complex approach.

The following steps will help to ensure the early stages of the planning process proceed in the most effective way:

- **Preparation of a Planning and Design Brief**
A detailed brief prepared by the local planning authority should be the first step in informing the development of a new retail scheme. The brief should highlight the local issues and site constraints, and provide a guide for the scale and form of the development. Guidance on writing planning and design briefs can be found in government publications *Planning and Development briefs - a guide to better practice*, (DETR 1998) and *By Design - Urban Design in the Planning System: towards better practice* (CABE/DETR, 2000). The brief should include provisions for site analysis and consultation.
- **Identification of interest groups**
Details of relevant community associations, adjacent landowners, Chambers of Trade, public bodies (including statutory consultees), user groups or voluntary organisations need to be assembled.

- **Scheme working group**
A working group should be set up with representatives from the local authority, English Heritage, CABE and the development partner. The group should meet regularly to help steer the development and work positively to achieve imaginative solutions.
- **Site analysis and policy research**
A full analysis of the site and its context is a prerequisite, to ensure that all local issues are addressed at the outset. This may call for area characterisation, and an archaeological, building and conservation area appraisal of the site and its surroundings. Statutory planning policies as set out in Regional Plan and the Local Development Framework should be carefully considered, including a review of supplementary guidance and any retail capacity studies.
- **Masterplanning and developer's position statement - scheme rationale**
Large or complex developments call for a comprehensive masterplan, providing the framework for the subsequent design.

The operational needs of contemporary retailing can challenge historic areas in a variety of ways. The issues should be acknowledged in the brief, with a view to establishing areas for negotiation and, in the case of prospective loss of historic fabric, developing a mitigation strategy. Some of the challenges may include:

- risk to archaeological deposits or historic building fabric;
- loss of the integrity of historic buildings through alteration, extension and amalgamation;
- reduction of the number of shops through the loss of small units, or the need to accommodate traders needing large, undivided floorplates;
- erosion of historic grain (including medieval burgage plots behind frontages) through rear extensions, car parking and the amalgamation of adjacent properties;
- roofscape;
- loss of local identity through over-dominance of national and international branding;
- traffic impact of trade and visitors; and
- servicing requirements.

A position statement should be prepared setting out these issues and potential solutions in the form of a scheme rationale.

Once the principles of the development have been established, it is essential that a clear structure is adopted for the planning process. The participation of key players and other interested parties should be sought at the earliest opportunity. This will reduce the risk of later clashes or unexpected issues coming to light when to resolve them would be expensive and time consuming. A number of initiatives can ensure that this process is carried out effectively.

- **Constant dialogue**
A regular programme of meetings involving project partners and stakeholders is essential. This provides a recognised forum for issues to be raised and actions to be determined, which will benefit all those involved. For bigger projects, a task force might be set up for this purpose. Within the planning authority, historic environment specialists, as well as their development control colleagues, should be fully involved from the outset.
- **Public consultation**
Public participation is essential for any major scheme and a prerequisite of the Local Development Framework through the Statement of Community Involvement. Community engagement can work particularly well in historic places, where there is often a greater depth of understanding and sense of responsibility for the urban fabric. Additionally local amenity societies will have a wealth of local knowledge. The retail industry is now much more attuned to public involvement at all stages, from the first seeds of a scheme through to post-completion. Early participation in the design of the scheme, including open space or pedestrianised areas, can be particularly fruitful.
- **Communication**
Most commercial developments will have certain aspects which need to be kept confidential, but where possible, information should be freely available from the very start. Information about the implications for the historic environment will always be of interest to members of the public. Newsletters, exhibitions and websites are all useful ways of keeping people in touch and stimulating feedback on emerging proposals. Hoardings around the site can be a large noticeboard for information display and temporary public art and can soften the harsh appearance of a site during construction.



A Involvement in the early stage of a planning and design brief
B Examples of development scheme newsletters for Whitefriars, Canterbury and Chapelfield, Norwich

DESIGN GUIDELINES

New retail development in historic areas should always seek to preserve and enhance its surroundings. In most cases, the historic environment itself will set a benchmark for quality, whether for building design, ground plan or surface treatments.

English Heritage's publication with CABE, *Building in Context* (2002), suggests principles for new development in historic places and supports these through a sequence of case studies. Planning Policy Statement 1: *Delivering Sustainable Development* (ODPM, 2005) states that design which is inappropriate in its context, or which fails to take the opportunities available for improving the character and quality of an area and the way it functions, should not be accepted.

Many historic centres have a centuries-old street pattern, long pre-dating most or even all of their present day buildings. Tangible evidence for this, and a powerful contributor to local identity, is the survival of narrow plots and modestly scaled buildings, which have often been built over a long period in different forms and materials. New retail developments in such places frequently face the challenge of fitting larger shop units within this historic grain and preserving its unique character. There are a number of broad design guidelines which can be adopted for all retail schemes in historic areas:

- **Appropriate form**

Retail developments in historic areas should demonstrate the highest quality architecture and urban design. The key objective should be the ability to respond creatively to the challenges of a historic context and to follow through with well detailed, distinctive buildings of integrity, where, as a general rule, modern design is preferred.



- **Scale and massing**

The height of the development should relate to that of the adjacent buildings. If the area is characterised by buildings of varying height, the roofline should be varied to assist the assimilation of the new buildings with their surroundings. This must form part of a considered architectural response. Large expanses of flat roofs or surface car parks that are visible from public vantage points are not appropriate.

- **Response to context**

New development should respond to the character of the whole area, as well as adjacent buildings. In addition, major new development should provide public spaces and new linkages. The layout and circulation should also reflect the growing expectations for town centres to be accessible to all, 24 hours a day, preserving traditional thoroughfares wherever possible.

- **Materials**

Consider drawing out local distinctiveness by using materials or details evident in the area.

- **Historic street patterns**

The street pattern in historic areas is often very fine-grained, and it may not always be possible to preserve or replicate it in a new retail development. Where this is the case, the priority should be to identify the most significant routes and to incorporate these within a scheme, making good the connections with the surrounding area. The routes should be inviting to pedestrians, and there should be active frontages onto all existing or new routes.

- **Flexibility for future needs**

Our surroundings, whether urban or rural, are in a state of flux. The current resurgence in city centre living, for example, is encouraging the market for night-time and leisure uses in some historic areas. It is recognised that if major retail schemes are to make a lasting contribution to their historic surroundings, they should be designed in such a way as to allow future changes of use or even piecemeal redevelopment.

GUIDELINES FOR NEW RETAIL DEVELOPMENT IN HISTORIC BUILDINGS

The successful integration of new retail development in historic areas requires careful planning, management and design. The primary issue to be resolved relates to context and the need for such development to respect the scale, massing and character of the existing urban environment.

However, where retail development includes accommodation of new units within existing historic buildings, the special interest of the individual buildings must be evaluated as a starting point for the design.

There are a number of overriding principles which should be adopted in all new retail development schemes in existing buildings:

- **Site analysis**

For those schemes involving groups of historic buildings and areas, a site analysis should be undertaken to determine the area's capacity to accommodate change, to identify those attributes, features and fittings that may warrant retention and measures that have been taken to avoid or minimise adverse impacts. The presence of below-ground archaeological remains may also be an important factor. Advice from the local authority should always be sought, especially before detailed proposals have been drawn up. For those buildings that are of particular significance, are large in scale or present complex design issues, consideration should be given to the preparation of a Conservation Plan leading to a Management Strategy or Framework.

- **Research the significance of the buildings**

A thorough appreciation of the special interest of the buildings is the starting point to any design. It will help to identify the scope for changes and improvements, as well as to show what should be preserved.

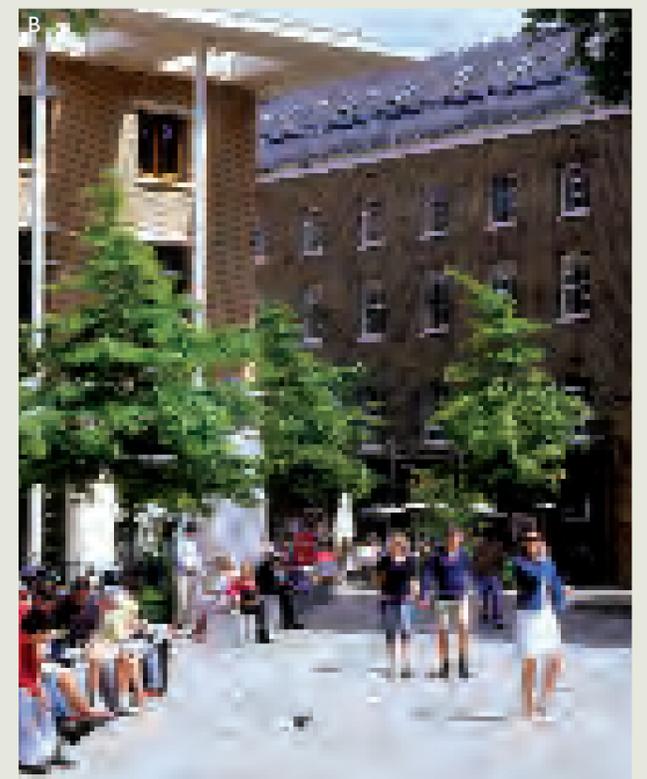
- **Preserve the architectural and historic integrity of the buildings**

New retail development which adjoins historic buildings should respond to the scale, massing and use of materials in the most sympathetic way possible. Buildings of historic interest should be retained and modified. Facadism should be avoided. However, where parties agree that the overall benefits of a scheme outweigh the loss of part of a building of lesser interest and where its facade is a significant part of the street scene, the retention of this alone may be acceptable, subject to the sensitive joining of old and new.

- **Invest in the design of signs and fascias**

The quality of the historic environment can be enhanced by carefully sited and appropriately designed signage. This is particularly relevant for retailing where the intensely competitive nature of the industry requires individual traders to advertise as much as possible. This objective can be at odds with the preservation of the historic environment, however, and so fascia designs and street signs should respect the appearance and scale of their host buildings.

Many local authorities have policies or guidance on the use of advertising and signage, particularly within conservation areas.



A Grainger Town, Newcastle

B Successful insertion of a modern retail unit within an historic building: Duke of York Square, London

ENGLISH HERITAGE'S POSITION

Where decisions are being made about the future of historic buildings, areas or landscapes as part of a retail development scheme, English Heritage will seek to ensure that their historical, architectural and archaeological significance has been properly assessed. In places where the historic environment is distinctive, retains its coherence and is valued by the local community, English Heritage will favour an approach which promotes incremental change as an alternative to comprehensive redevelopment.

It is essential that decisions about future retail development are based on an informed understanding of the historic environment. This should form part of the masterplanning and design process. An assessment of the historic environment should be undertaken at the earliest opportunity, and certainly before detailed proposals are drawn up. As well as identifying assets which are protected through listing, scheduling or conservation area designation, assessments should always take into account the value of the wider historic environment. A range of techniques such as characterisation, impact assessment, conservation planning and archaeological evaluation exist to help with this process. These may contribute to the wider considerations in planning and designing for retail development.



A Lion and Lamb Yard, Farnham

A checklist for success

1. Robust research
2. Contextual perspective
3. Stakeholder participation
4. Conforming to policy
5. A responsive brief
6. Commitment to good design
7. Integrating built form and public realm
8. Promoting activity and vitality
9. Responding to customer needs
10. Re-inforcing distinctiveness

“Sustainable development in any town, especially those of historical importance, is a balance between the future needs of the community and the legacy of their past. We believe that consultation with all stakeholders is the key to achieving this balance, and we are demonstrating real regeneration using this approach at Canterbury, Exeter and Cambridge”.

Peter Cleary, Head of Retail Development, Land Securities, February 2005

CHECKLIST FOR SUCCESSFUL RETAIL DEVELOPMENT IN HISTORIC AREAS

C1

ACHIEVE EARLY AND CONTINUOUS CONSULTATION

The **Norwich Chapelfield** scheme demonstrates the value of close dialogue and communication with local people, consultees and interest groups.



C1a

identify stakeholders and conservation groups at the outset

C1b

prepare a consultation strategy and budget

C1c

build in time for design review, revisions and additional consultation

C2

APPRECIATE AND RESPOND TO THE CONTEXT

At **Canterbury** the design was informed by a comprehensive analysis of the city and its historic quarters, informing a strategy that integrates the development with the historic centre.



C2a

commission a characterisation study of the historic environment and exploit local history and identity including street names

C2b

look well beyond the boundaries of the site to ensure integration with the surrounding streets or the underlying pattern of the area

C2c

ensure that views of historic local landmarks are protected

C3

PROMOTE SUSTAINABLE DEVELOPMENT AND ADAPTABLE BUILT FORM

Duke of York Square, Chelsea: a balance was struck between redevelopment and conversion, creating new public thoroughfares and re-using historic buildings.



C3a

assess overall retail needs

C3b

assess whole life costs of the scheme and long term economic interests of the wider area

C3c

ensure the masterplan is sufficiently flexible to allow for future changes

C4

ACHIEVE ARCHITECTURAL AND URBAN DESIGN INTEGRITY IN RELATION TO HISTORIC TOWNSCAPE

At **Ludlow** the sensitivity of the site called for a strong design solution that related to the historic context.



C4a

prepare a design statement, including a three-dimensional masterplan

C4b

produce a three-dimensional model to test and develop the grain, massing and scale of the scheme

C4a

ensure the scheme respects the historic street pattern

<p>C5</p> <p>BALANCE TRAFFIC REQUIREMENTS AND PUBLIC TRANSPORT ACCESSIBILITY</p>	<p>Grainger Town at the heart of Newcastle upon Tyne is well served by public transport, and there are public car parks on the periphery of the historic core.</p> 	<p>C5a prepare a comprehensive parking and transport strategy <input type="checkbox"/></p> <p>C5b work with public transport providers to ensure its delivery <input type="checkbox"/></p> <p>C5c make provision for the needs of people with disabilities and those with children <input type="checkbox"/></p>
<p>C6</p> <p>ACKNOWLEDGE OPERATIONAL REQUIREMENTS INCLUDING SERVICING ARRANGEMENTS</p>	<p>Farnham, a fine-grained historic town, has preserved the intimacy of the Lion and Lamb Yard by ensuring that all servicing takes place off-street, to the rear of the development.</p> 	<p>C6a prepare a servicing strategy that balances operational efficiency with safe and easy access for shoppers in peak hours <input type="checkbox"/></p> <p>C6b ensure that all pedestrian and vehicular routes are clearly signposted <input type="checkbox"/></p>
<p>C7</p> <p>STRIVE FOR HIGH QUALITY DESIGN</p>	<p>The N1 centre at Islington, London introduces contemporary architectural forms and materials that respect the scale and character of Upper Street.</p> 	<p>C7a prepare a planning and design brief <input type="checkbox"/></p> <p>C7b commission an architect or hold a design competition for all sites <input type="checkbox"/></p> <p>C7c plan for the design input of present and future tenants, including guidelines for signs and fascias <input type="checkbox"/></p> <p>C7d invest in quality of detailing and materials including landscape and public art <input type="checkbox"/></p>
<p>C8</p> <p>ENCOURAGE A MIX OF USES TO SUSTAIN THE VITALITY OF THE AREA</p>	<p>Bold Street Liverpool and Taunton have been revived through the conversion and re-use of old buildings to accommodate a new mix of uses.</p> 	<p>C8a design buildings and spaces to encourage a mix of uses <input type="checkbox"/></p> <p>C8b be flexible in the approach to historic buildings to encourage their re-use <input type="checkbox"/></p> <p>C8c retain internal staircases and separate entrances to allow independent use of upper floors <input type="checkbox"/></p> <p>C8d use Section 106 Agreements to support a mix of tenancies <input type="checkbox"/></p>



A N1 Centre, Islington

SOURCES OF FURTHER INFORMATION

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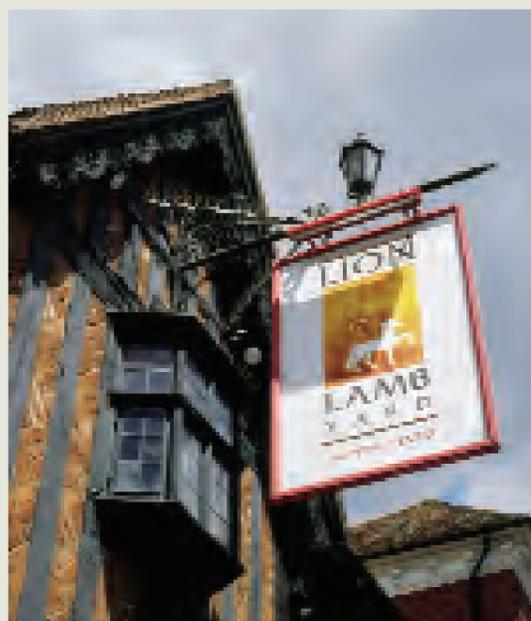
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also welcome the opportunity to work co-operatively with other organisations which share our aims and objectives. We are therefore pleased to partner this publication exploring a subject of great interest to our membership.

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