



Our Services

If you are involved with land or development of any kind, edp offers the following services:

Arboriculture

Trees on development sites, BS5837 tree surveys, arboricultural impact statements, tree protection measures, valuations, subsidence assessments.

Access and Recreation

CROW issues and public rights of way, public open space design, sports fields, children's playgrounds, S106 negotiations.

Archaeology and Cultural Heritage

Archaeological assessment and evaluation, heritage management plans, archaeological mitigation strategies, project management, listed building and conservation area issues.

Agriculture and Rural Land Use

Detailed and semi-detailed agricultural land classification (ALC) surveys, agricultural and horticultural circumstances, farm and estate dwellings, rural enterprise diversification.

Ecology and Protected Species

Phase I and II habitat surveys, DEFRA licence applications, protected species' surveys and mitigation strategies, ecological management plans and clerk of works.

Landscape Planning and Management

Landscape and visual impact assessment, townscape assessment, landscape and woodland management plans, landscape maintenance schedules.

Landscape Design and Masterplanning

Landscape design for all aspects of the outdoor realm, garden design, masterplanning, space planning, land budgets, planting plans, detailed design and project management.

Environmental Impact Assessment (EIA) and Strategic Environmental Assessment (SEA)

Selected input or full co-ordination of screening, scoping and Environmental Statement (ES) production for development projects or strategies.

Expert Witness

Wide-ranging experience of all aspects of environmental planning, design and management at national, county and local levels.

Graphics and Promotional Material

Brochures, photomontages, community planning and project exhibition boards, multimedia presentations, education and interpretation.



The Environmental Dimension Partnership

14 Inner Courtyard, Whiteway Farmhouse, The Whiteway, Cirencester, Gloucestershire GL7 7BA

T 01285 640640 F 01285 652545 E info@edp-uk.co.uk

BS5837:2005 Trees in Relation to Construction – Recommendations How will this new British Standard affect your development proposals?

The new BS5837:2005 replaced the former BS5837:1991 on the 21st September 2005. The new standard represents a significant development in the recommendations set out in its predecessor in a number of important respects. The purpose of this briefing note is to set out these differences and to remind EDP clients and consultant colleagues of the provisions of the new standard.

BS5837:2005 - Genesis and Background

BS5837:1991 was a benchmark document for all those dealing with trees on development sites. The standard was frequently cited at Inquiry. Time after time, it was the determining document in disputes regarding development close to trees. After 14 years of complying to the 1991 standard, the new BS5837:2005 has been published and its implications, several months down the line, are beginning to be better understood.

Scope of the New Standard

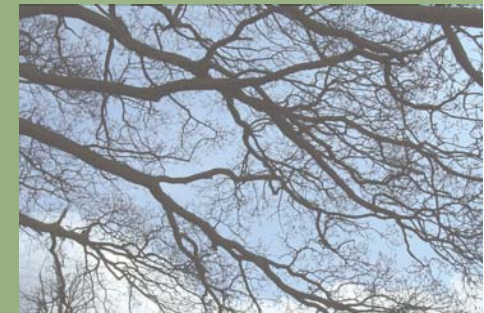
BS5837:2005 gives recommendations and guidance on principles to be applied to achieve a satisfactory juxtaposition of trees (including shrubs, hedges and hedgerows) and built structures, including service trenches.

How does the new BS5837 differ from its Predecessor?

The new standard differs from its predecessor in a number of important respects:

- (i) **Only arboriculturists need apply:** in contrast to almost all other British Standards, BS5837 is specific about who can and who cannot undertake tree surveys. To comply with the new standard, it is not sufficient that a competent person such as a landscape architect undertakes the survey. Paragraph 4.2.1 of BS5837 requires instead that an arboriculturist should "...record information about trees on the site independently of and prior to any specific design for development"¹. Under the previous standard, landscape architects and other competent persons may legitimately have undertaken tree surveys, the new British Standard requires specifically that only an 'arboriculturist' does so.
- (ii) **Cradle to Grave approach:** The new standard embodies five key stages in the process of assessment and implementation of developments in relation to trees. The five stages (outlined below) extend from pre-design survey and evaluation through to securing the discharge of planning permissions

¹ An arboriculturist is defined at para 2.1 of BS5837:2005 as "a person who has, through relevant education, training and experience, gained recognised qualifications and expertise in the field of trees in relation to construction".



and implementation on site. The standard recommends that an appropriately qualified arboriculturist will be a member of the design team throughout that process and makes provisions for the arboriculturist to provide advice and influence the development proposals from inception to completion. The five stages are:

- (a) Tree survey and preliminary constraints advice (prior to design proposals)
- (b) Design review: feedback from arboriculturist regarding emerging proposals
- (c) Tree integration and protection proposals (detailed design inputs)
- (d) Discharge of relevant planning conditions
- (e) On-site monitoring during construction (clerk of works role)

- (iii) **More information required:** It is no longer sufficient merely to submit factual information about each tree with a planning application. The presumption that an arboriculturist will be involved throughout the development process has resulted in a requirement to calculate the RPA (see below) and for the preparation of a number of additional documents, as follows :
- (a) **Root Protection Area (RPA):** For each tree considered worthy of retention, the RPA should be calculated using a formula given in BS5837. The RPA is the minimum area of land which can contain sufficient rooting volume to ensure the survival of the tree (shown in plan form in m²).
 - (b) **Tree Constraints Plan (TCP):** A plan prepared by an arboriculturist for the purposes of layout design, showing the RPA and representing the effect that the mature height and spread of retained trees will have on layout through shade, dominance etc.
 - (c) **The Tree Protection Plan (TPP):** A scale drawing prepared by the arboriculturist in finalised layout proposals, showing tree retention and tree and landscape protection measures, including the location of protective fencing and the Construction Exclusion Zone (CEZ).
 - (d) **An Arboricultural Method Statement (AMS):** The methodology for implementing aspects of the development that have potential to result in the loss of or damage to a tree, including details of an on-site protection monitoring regime.
 - (e) **An Arboricultural Implications Assessment (AIA)** may be required in more complex cases to identify and evaluate the extent of impacts of implementing the development on trees.
- (iv) **The former Quality Class System of tree assessment has been replaced :** The simple A, B, C, D Quality Class classification has been replaced by a process of tree assessment which begins with the presumption that all trees are Category A unless proved otherwise. The standard includes a cascade chart for tree quality assessment as Table 1. Arborists are requested first to identify Category R trees for removal. They then assess each and every tree against the provisions of Category A, turning to examine the trees against the Category B description only if it fails to meet a standard required for a Category A tree and so on.
- (v) **Tree lifespan is critical to retaining a tree :** Central to the assessment of which Category any given tree falls into is an assessment of its useful lifespan. A tree can only be Category A if it can have a safe, useful lifespan of greater than 40 years, irrespective of its arboricultural or landscape qualities. Category B trees should be capable of making a significant contribution for a minimum of 20 years.
- (vi) **Additional sub-categories are included :** The new standard includes sub-categories in which each tree is defined as being of primarily arboricultural, landscape or cultural importance.

Clearly the new standard is much more demanding in terms of the information required to be submitted with a planning application and demonstrating that trees have informed the design and can be suitably protected during and after development.

Implications of the new BS5837

Several months after its publication, BS5837 is already having a significant effect on the way in which trees are assessed and retained on development sites.

Local planning authority tree officers are increasingly aware of the provisions of BS5837:2005 through courses run by the Arboricultural Association and local authority tree officer groups. There have been cases of applications being refused to be registered because the arboricultural information did not comply with the new standard.

Broad implications of the new standard are considered to be as follows:

For trees on development sites: Fewer trees are likely to be retained but

- They will be trees of better quality;
- They will be better protected;
- As a result, the retained trees are likely to be resented less than in the past;
- These trees are more likely to be retained beyond ten years after development has been completed.

For developers and consultants

- Developers will be required to commission tree specialists rather than simply a competent person;
- BS5837:2005 recommends that the arboriculturist be appointed early, then retained throughout the design and development process;
- There will be a greater number of advisory and supporting documents in support of a planning application and discharge of planning conditions;
- This is likely to result in potentially more complex and expensive appointments but (we hope) in a more favourable outcome for the client if fewer but better trees are retained.

Looking Ahead ...

Unlike its predecessor, the Technical Committee V/213 which prepared the standard, is due to meet on an annual basis to take account of comments received and, where necessary, issue revisions.

In particular, the issue of the Root Protection Area (RPA), its extent and layout is expected to be tested at Inquiry, as are some of the other more substantial departures from the original standard.

Further information about BS5837 and its detailed implications can be obtained by contacting:

Duncan McInerney BSc(Hons) MLD MLI M.Arbor.A
Office: 01285 640640
Mobile: 07831 118758
Email: duncanm@edp-uk.co.uk

Note: If you would like your colleagues to learn more about the content and implications of BS5837:2005, we can visit clients and provide a powerpoint presentation.

